

FRONTSTEPS TOOLKIT

PREPARE FOR PAYMENTS

Utilize the following checklist to ensure your team is prepared and communities are ready for the high-volume payment season.

1

CALIBER ACCOUNT READINESS

- **Valid Emails on All Unit Owner Accounts.** Make sure each account includes a current, unique email address. Each email address needs to be assigned to the correct person. Ensure emails are receiving individual correspondence. One email per person — no shared or group emails.
- **Change of Ownership.** Always process ownership transfers using the Change of Ownership Wizard in Caliber.

2

COMMUNITY PORTAL SETUP & RULES

- **No Manual Owner Adds.** All owners must be added in Caliber and synced overnight to the portal.
- **Ownership Changes.** For new owners, use the Change of Ownership Wizard in Caliber - not manual portal edits or name changes in Caliber.
- **Unit or Owner Updates.** Make changes (names, addresses, contact details) in Caliber only; the portal will update via sync.

Please keep in mind that if a homeowner has a scheduled payment/autopay set up, edits to the name in Caliber will disable their scheduled payment/autopay.

3

OWNER SELF-SERVICE ENABLEMENT

- **Enable “Payments Quick Action.”** This allows owners to access printable statements and payment history directly in the portal. More importantly it helps reduce PMC support calls.

HOW TO...

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1

ADD QUICK PAY LINKS

- Place Quick Pay access on community sites for one-time, no-login payments. They increase payment convenience for homeowners.
- Setup QR Codes on Statements!

2

PAYMENT MONITORING DURING PEAK SEASON

- Assign staff to check the FSPay Dashboard daily for disputes, failed payments, or refunds.
- Confirm payouts/deposits are posting as expected.
- Perform all FS Payment refunds in the FSPay Dashboard

3

SUPPORT & ESCALATION READINESS

- Payment Support: If your team needs any assistance with the FSPay Dashboard, Reporting, Refunds, Deposits, Payouts, etc. Please contact:
 - Email: fspay@frontsteps.com
 - Phone: (800) 992-4384

Setting Homeowners Up for Success This Payments Season with **FRONTSTEPS**

Management companies can support homeowners with timely reminders that make year-end payments stress-free. Share the following guidance to help residents stay on track.

ACCOUNT SETUP & ACCESS

- Encourage owners to register for the portal as soon as possible.
- Remind them to save login credentials securely.
- Instruct them to log in early to confirm access.
- Suggest bookmarking the portal login and Quick Pay link.
- Ask them to keep their account number handy.

PAYMENT PREPARATION

- Remind owners of their assessment due dates.
- Encourage them to add payment methods in advance.
- Recommend setting up scheduled/recurring payments to avoid missed deadlines.
- Suggest reviewing homeowner statements regularly for accuracy.