

Instructions for LVHA homeowners to view directory

Vail Briggs <vail.briggs@willismg.com>
To: Sharon Borglin <sborglin@gmail.com>, Don Yeaman <don.yeaman@hdrinc.com>
Cc: Don Talley <dtalley@mk1creative.com>

Fri, Apr 22, 2022 at 3:32 P

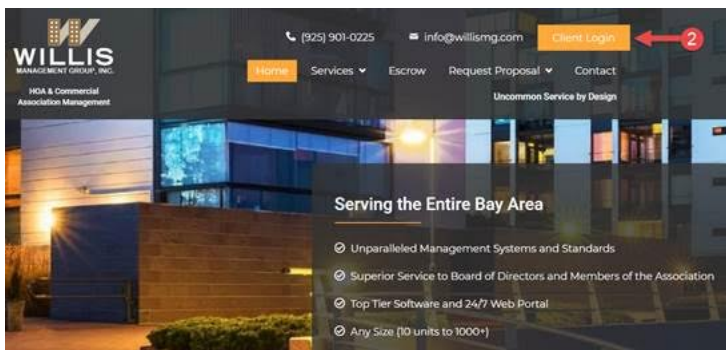
Hi Sharon,

I did misread you email! Below are the Web Portal Instructions.

Hello,

Please follow the instructions below to create your username and password. If you require payment set-up assistance, please refer to the details noted at the bottom of this email.

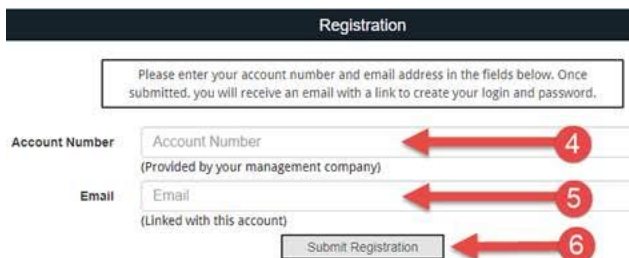
1. Log-onto www.willismg.com
2. Access the *Client Login* tab



3. Select the *Create Login* option

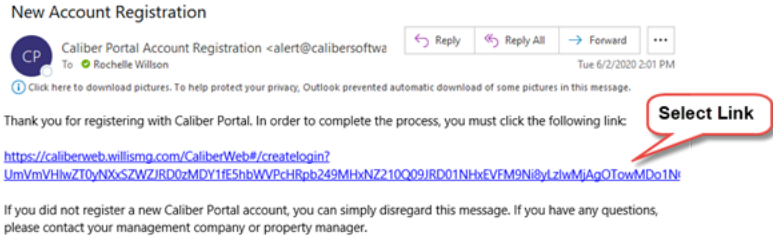


4. Enter your Account Number: **00000000**
5. Enter your email address
6. Select *Submit Registration*



7. You will receive an email from alert@calibersoftware.com titled New Account Registration, select the link as instructed.

*Please note, this link does expire if you do not complete registration in a timely manner simply start the process over to submit a new registration link.



8. You will be prompted to the *Create Login Credentials* screen, please enter a valid username and password, and **submit**.

The screenshot shows a form titled "Create login credentials". At the top, it says "Please enter your new username and password for your account." Below that, there are three input fields: "Username" (with a note: "(Username must have at least six(6) characters)"), "Password" (with a note: "(Password must have at least eight(8) characters, including one(1) uppercase, one(1) lowercase and one(1) number. These special characters !@#\$%^&*+=- may also be used.)"), and "Confirm Password" (with a note: "Re-enter Password"). Below the fields is a "Submit" button, which is highlighted with a red arrow.

9. Go back to the Willis Management Client Login Screen: <https://caliberweb.willismg.com/CaliberWeb#/> and enter your recently created username and password and select *Login*

The screenshot shows a login screen with three input fields: "Username", "Password", and "Login". Below the fields is a "Select Login" button, which is highlighted with a red arrow. There are also links for "Create login", "Forgot Username/Password", and "Still having trouble? Please contact your management company."

If you experience any issues, please clear your cache, and ensure the browser is up-to-date and try again.

How to clear cache; <https://kb.iu.edu/d/ahic>

How to update browser: <https://www.computerhope.com/issues/ch001388.htm>

NEED HELP SETTING UP AUTOMATIC PAYMENTS?

AUTOMATIC PAYMENTS (ACH): Please refer to the ACH instructions posted to the Assessment folder under Document or reach out to the Accounting Department at accounting@willismg.com or 925-901-0225 (option 4).

Document Folders

- Agendas
- Architectural Forms & Policies
- Assessments **2**

Available Documents

Document Name	Size	Upload Date	View Options
ACH Set Up using Web Portal.pdf 3	264.0 KB	02/28/2022	PDF

If you are unable to find the 'assessment' folder, your community's accounting may be outsourced (not Willis Management Group). Please reach out to your respective accounting department representative. Contact information can be found under the Directory option on the Portal.

Filters and Controls

- Owner Directory
- Board of Directors
- Management
- Accounting **2**

Directory

Name	Title	Address	Phone	Email
Condominium Financial Management 3	Accounting Department		(925) 566-6800	

Show items per page
 Clear column sorting

Thank you,

[Quoted text hidden]