Brightstar MANAGEMENT GROUP

Board Portal Guide

Powered by AppFolio

https://brightstarmanagementgroup.appfolio.com/connect/users/sign_in



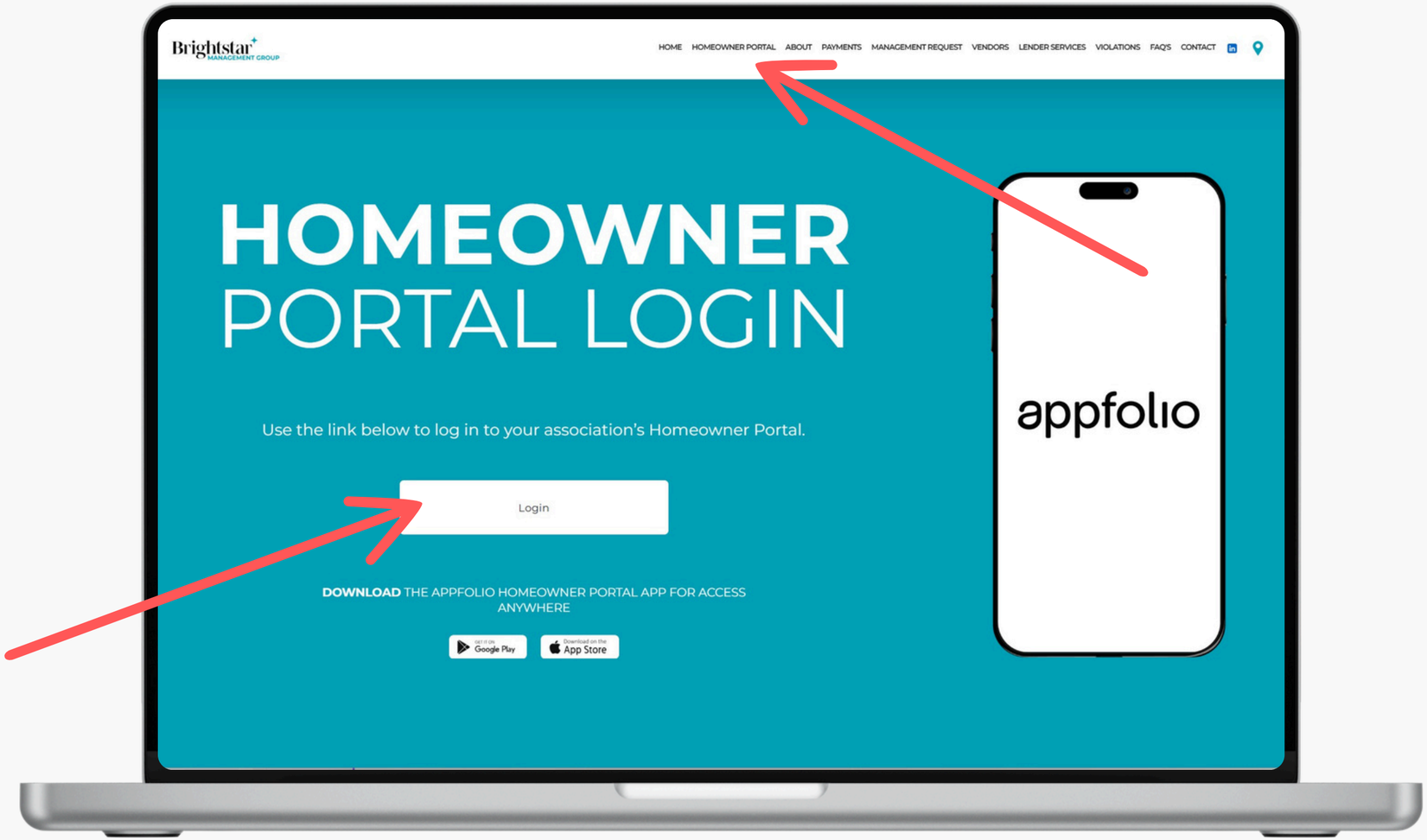
Contact Us
(303) 952-4004

www.brightstarhoa.com
hello@brightstarcolorado.com

Access the Portal Online

Access Anywhere, From Any Device

Visit www.brightstarhoa.com and click “**Homeowner Portal**” in the top, search bar. Click the “**Login**” button to access your Portal.



Download the App

Access your Portal on the Go

Download the Online Portal by AppFolio to access your Homeowner's Portal on your phone.



GET IT ON Google Play

Download on the App Store

Welcome

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Logging In

What's in the Board Member Portal

01 Logging into your Board Portal

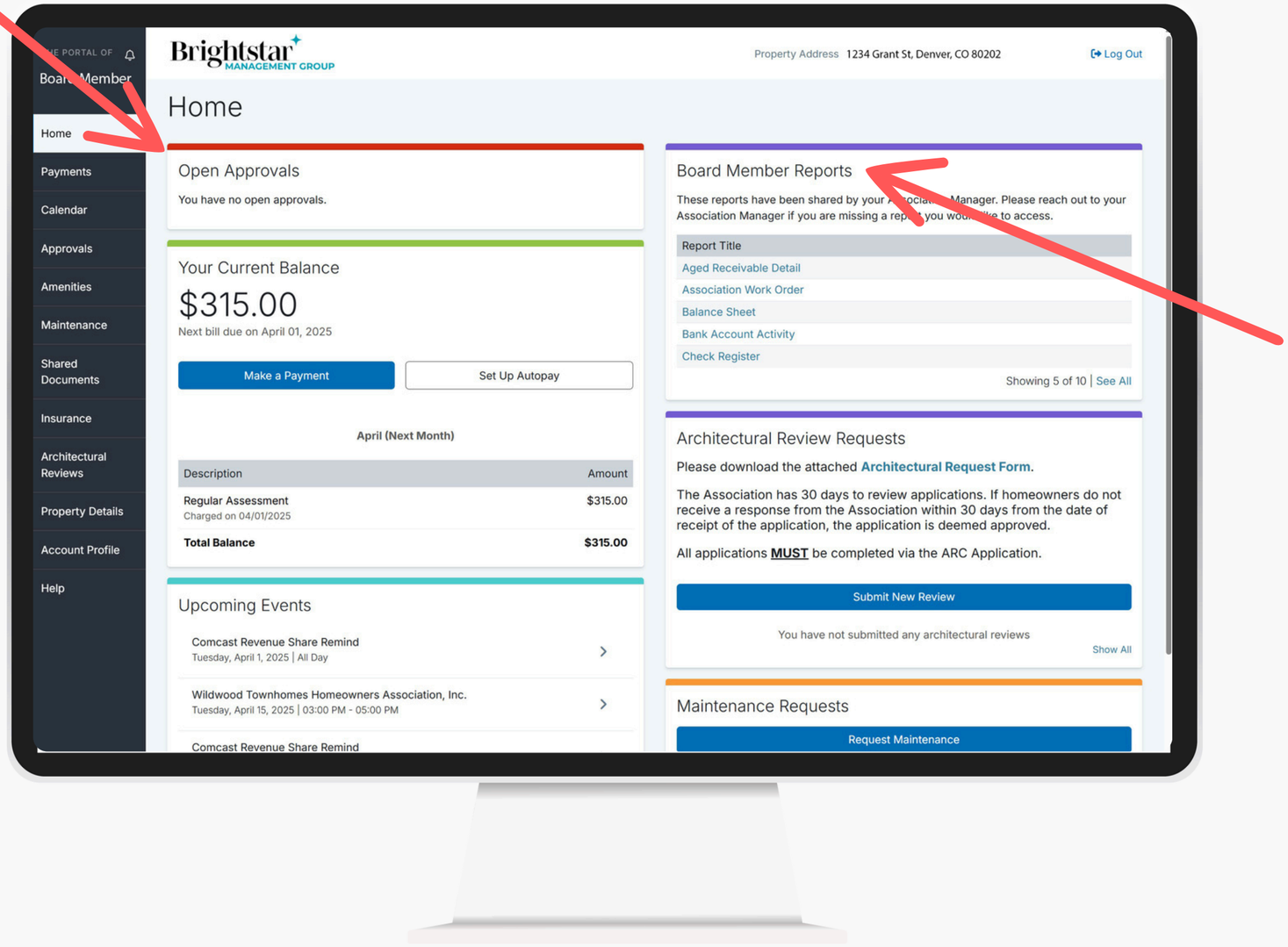
The Board Portal uses the same login as your Homeowner Portal

Initial Setup:

- Brightstar will add your Board Member status to your homeowner account.
- You will use the same login credentials as your Homeowner Portal.
- When Brightstar adds your Board Member status, additional features will populate in your Portal.

Access Your Portal:

https://brightstarmanagementgroup.appfolio.com/connect/users/sign_in



Invoice Approvals

Stay on Top of Association Bills

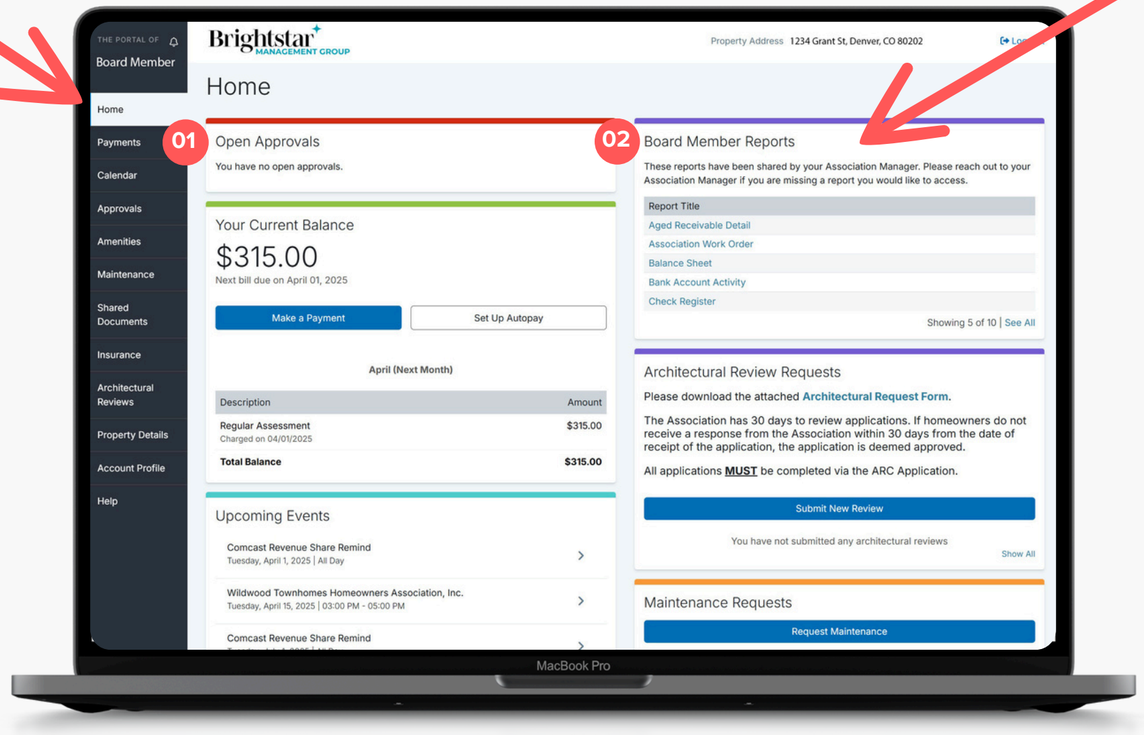
When a **new invoice** is uploaded to the Board Portal, you will receive an **email** to the email address on file with Brightstar.



Home Page

Board Member Functions

The Board Member Portal and the Homeowner Portal share the same basic features, just with additional functionality for Board Members.



01 Open Approvals

Open **Invoices and Architectural Requests** will populate in this section. If there are no current approvals, you'll see the message, "**You have no open approvals**".

02 Board Member Reports

Access a multitude of Reports such as:

- General Ledger Reports
- Balance Sheet Reports
- Work Orders
- Violations
- Delinquencies
- Etc.

Ask your manager to customize the reports the Board would like instant access to, through their Portals.

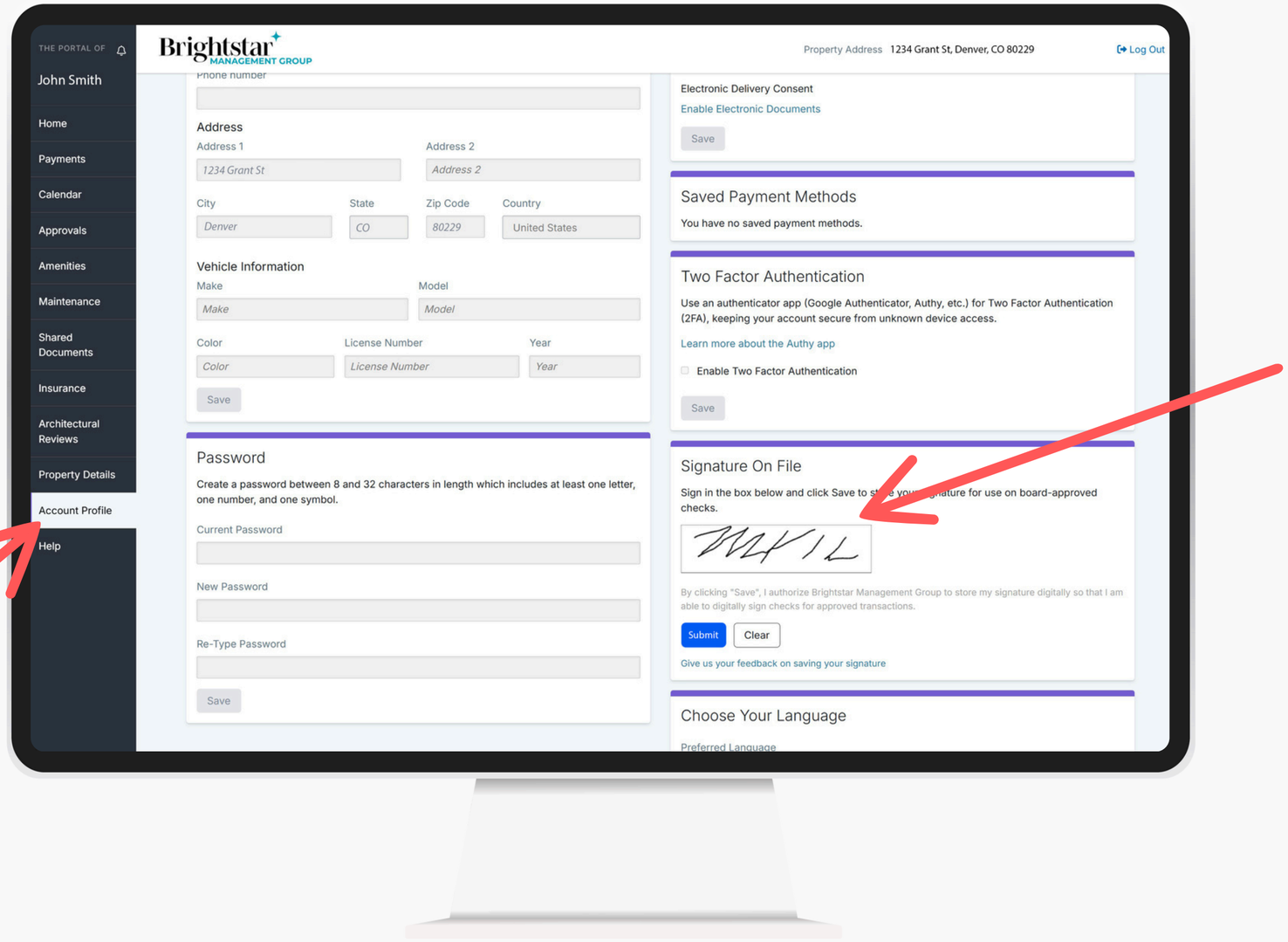
Signing Invoices

Setting up Your Signature

02 Set up Your Signature for Invoices

Your signature in the Portal is used to sign invoices processed through the Portal. This is how AppFolio signs the checks when processed through our system.

- Go to the "**Account Profile**" tab on the left-hand navigation.
- On the Account Profile page, go to the "**Signature On File**" box.
- Sign your name in the blank box.
  - **Computer:** Sign with your mouse or trackpad
  - **Mobile Device:** Sign with your finger
- Click "**Submit**".



Paying Vendors

Invoice Approval Process

03 Board Portal Home Screen

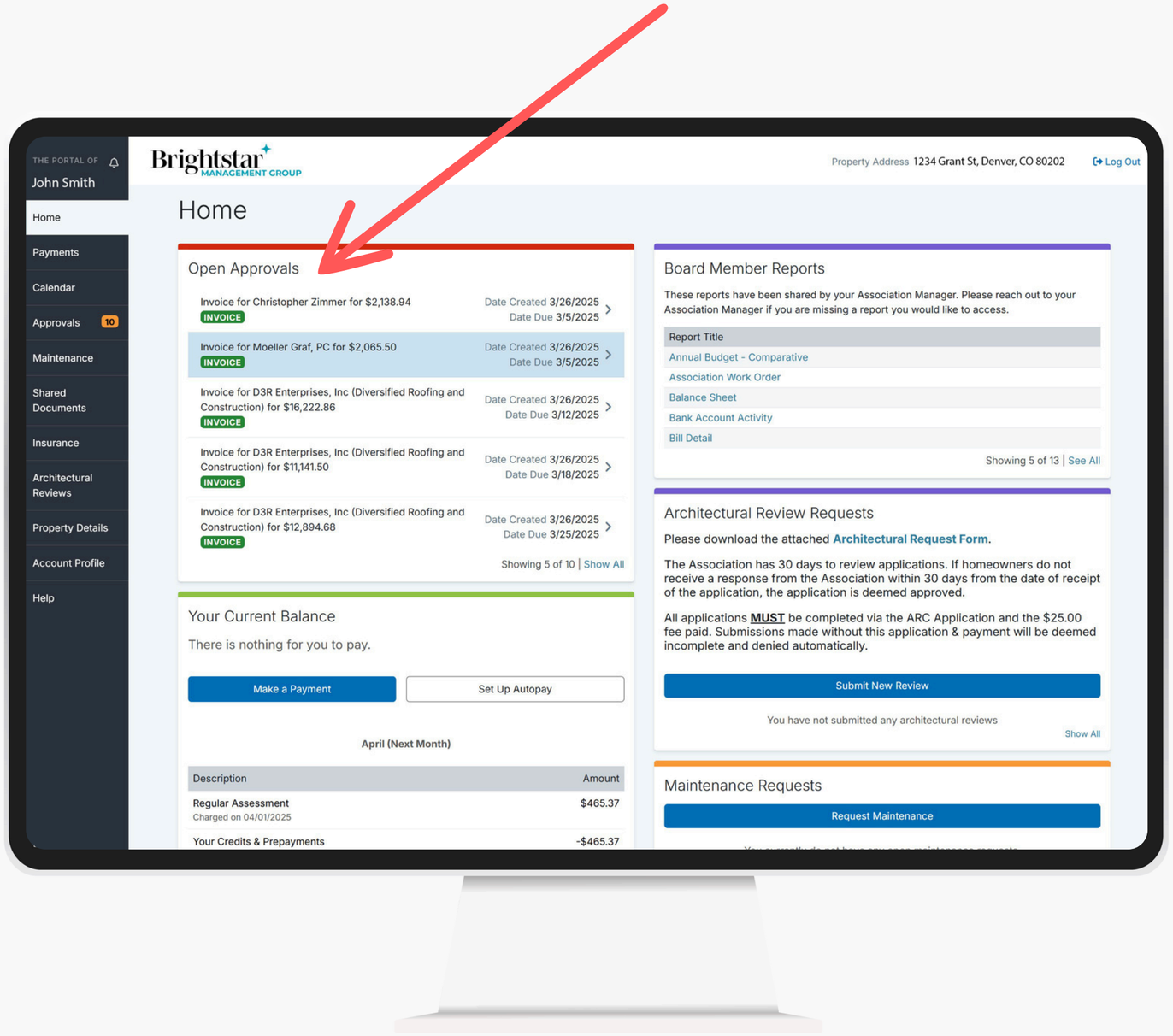
- When you log into your Board Member portal, you'll land on the Home Page. One of the most important sections is the **Open Approvals** box located at the **top left** and marked with a **red** bar.

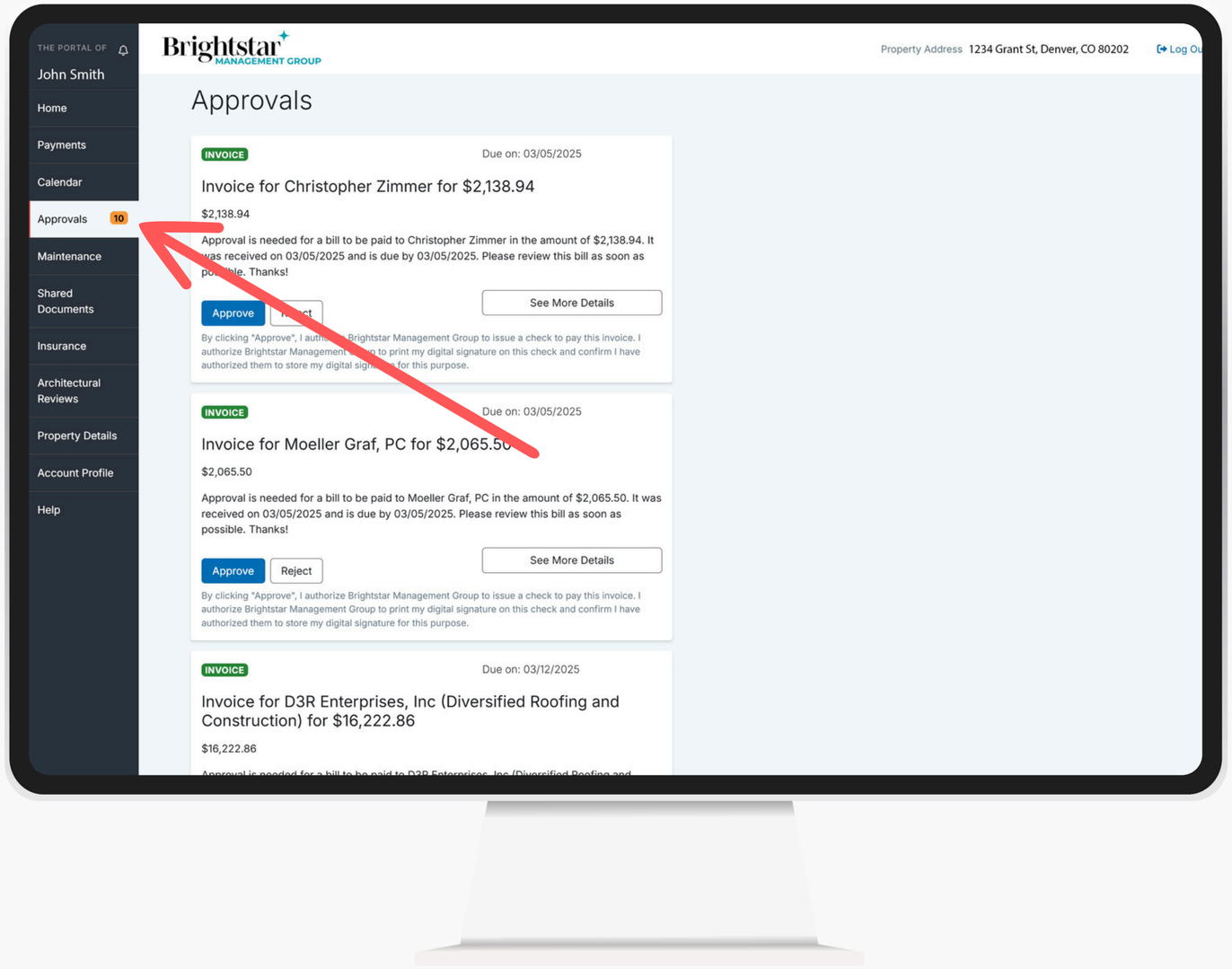
What You'll See:

- A list of invoices waiting for your approval

Each Invoice Includes:

- Vendor name
- Amount
- Date Created
- Due Date





Approvals Page

Invoice Approval Process

04 Invoice Approvals Page

To see all open invoices needing your vote, click the “**Approvals**” tab in the left-hand menu. This page shows every invoice that’s currently waiting for Board approval — even ones not shown on the **Home** screen.

What You’ll See:

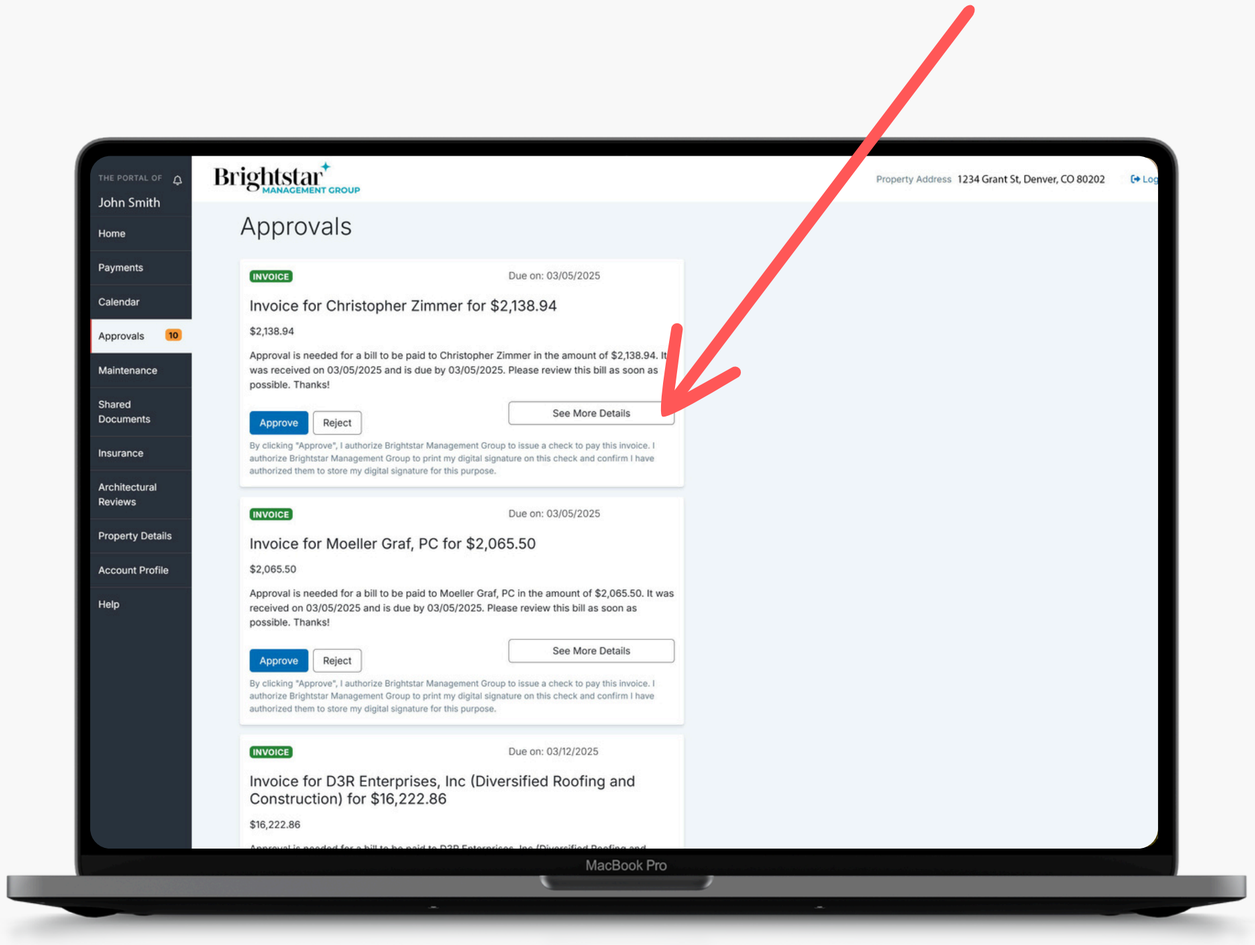
- Vendor name and invoice amount.
- A short message explaining the invoice and why it needs approval.
- The due date.
- Buttons to **Approve**, **Reject**, or click **See More Details** if you want to review attachments and comments first.

Note: This page is especially helpful if you want to go back and review old invoices. Once you **approve** or **reject** an invoice, it will still show for **1 month** on this page.

See More Details

Invoice Details

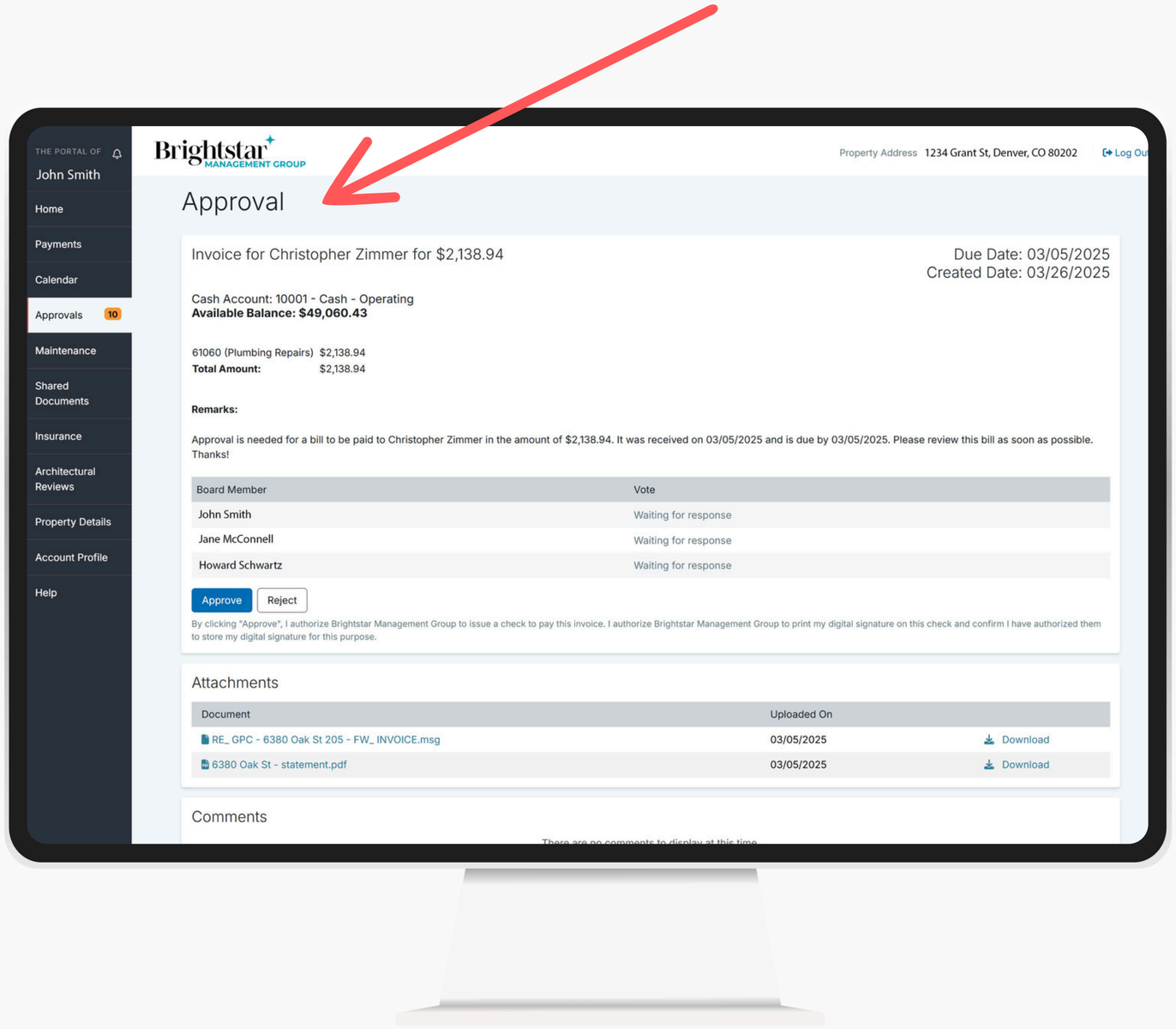
From the **Home** or **Approvals** Page, you can click on any invoice to see more information.



05 Click the Invoice

You'll be taken to a detailed invoice screen showing:

- The total amount and description of the invoice
- The account it's being paid from
- Who else needs to approve it
- Attached documents (*like statements or receipts*)
- Your options to **Approve** or **Reject**



Invoice Details

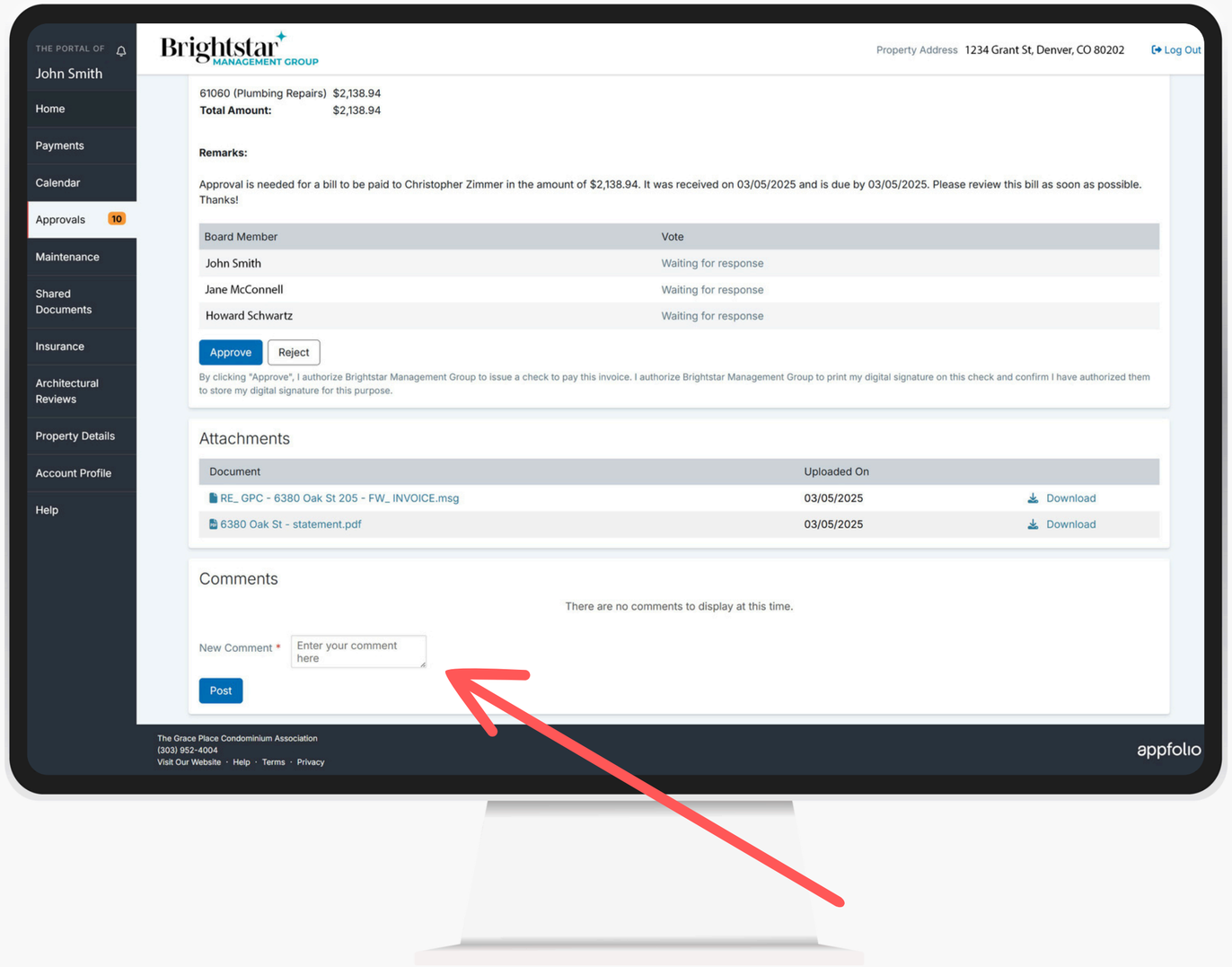
Invoice Approval Process

06 Invoice Details Page

The invoice Details Page contains information related to the invoice, along with a copy of the actual invoice that you can view.

What's on the Page:

- The total amount and description of the invoice.
- The account it's being paid from.
- Who else needs to approve it.
- Attached documents (*The Invoice, Statements, Supporting Documents*).
- Your options to **Approve** or **Reject.**
- Comments section.



Comments Section

Invoice Approval Process

07 Adding Comments to the Invoice

At the bottom of the Invoice Details screen, you'll see the Comments section. This is where Board members can leave notes for the manager or other Board members about the invoice.

How to Leave a Comment:

1. Type your message in the box that says "**Enter your comment here**"
2. Click **Post**

Please Note: If you reject the invoice, please leave a comment so the manager can work with the Vendor & Board to correct any issues.

Final Approval

Invoice Approval Process

08 Approving or Rejecting an Invoice

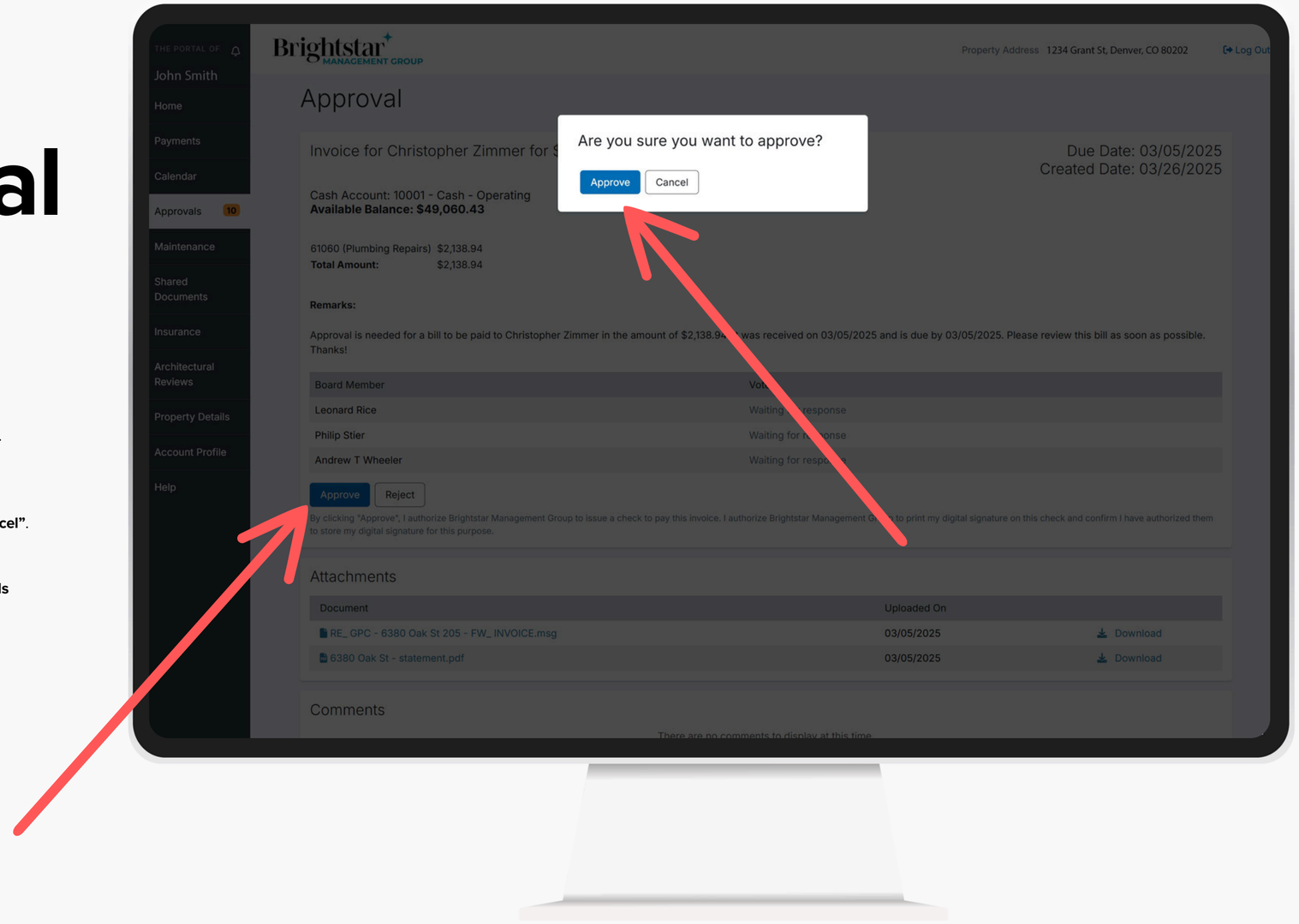
After reviewing the invoice, you can take action by clicking either **Approve** or **Reject**.

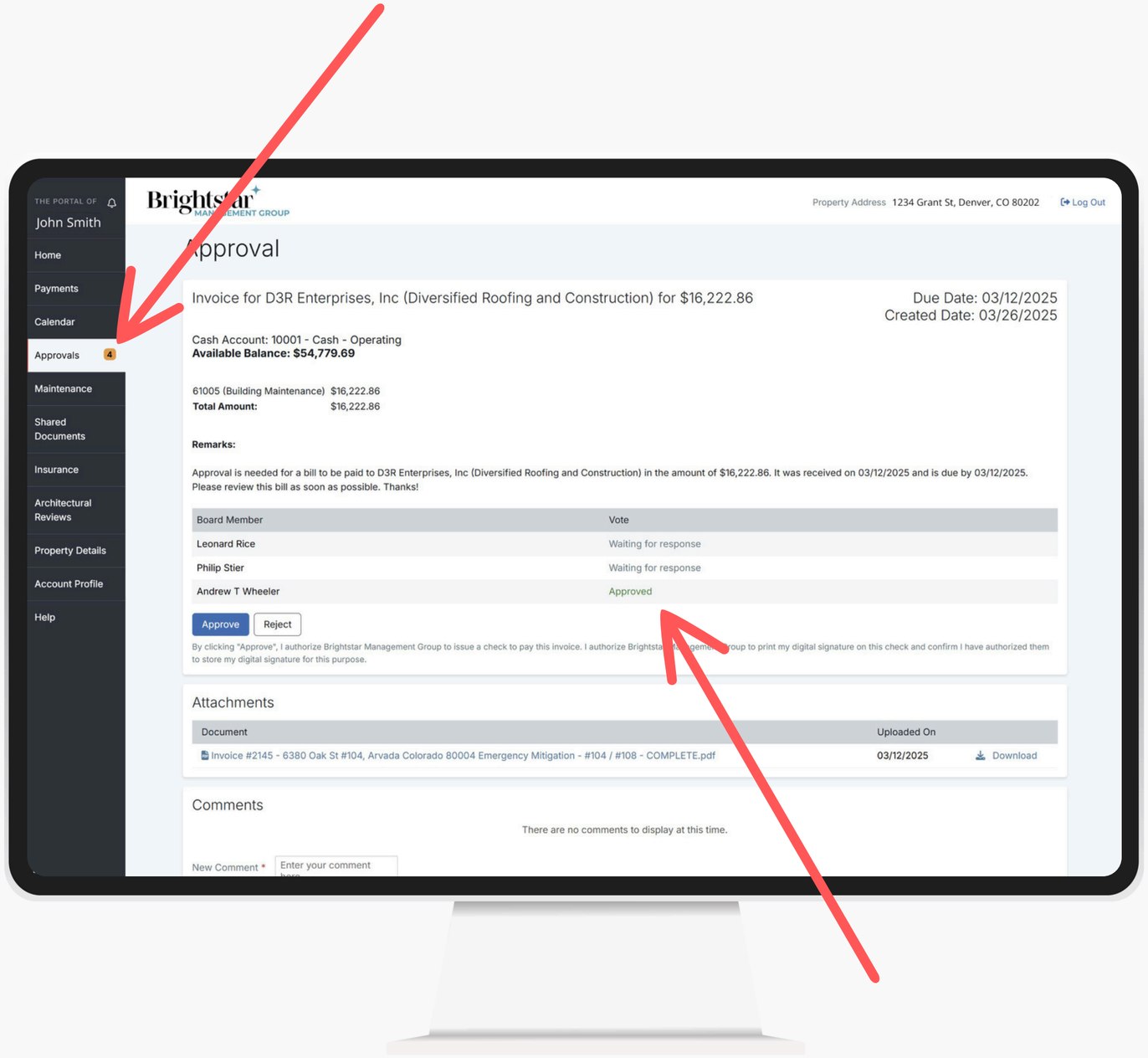
How it Works:

- Click the “**Approve**” or **Reject**” button.
- When you click the button, a popup will appear asking you to “**Confirm”** or “**Cancel”**.

What’s Next:

- Once you Approve or Reject the invoice, your voting status on the **Invoice Details** page will update to show your vote.
- Other Board members can still vote until all required responses are in.
- Once your voting threshold is met, the invoice will automatically be sent to the Accounting Department, who will send the check to the vendor.





Tracking Approvals

Invoice Approval Process

09 Tracking Your Invoice Approvals

Board members can track the status of invoices they've already approved by going to the **Approvals** page in their portal.

How to View Approved Invoices:

1. Log into your Portal.
2. Click "**Approvals**" from the left-hand menu.
3. Scroll to find the invoice you want to view and click on "**See More Details**"

Here you can view the Board Members assigned to approving invoices and their **Voting Status** on the invoice.

Once you approve an invoice and all required votes are received, the invoice will:

- No longer show as active.
- Be greyed out.
- Still be clickable for 30 days to view details.

Architectural Requests

Review Changes in Your Community

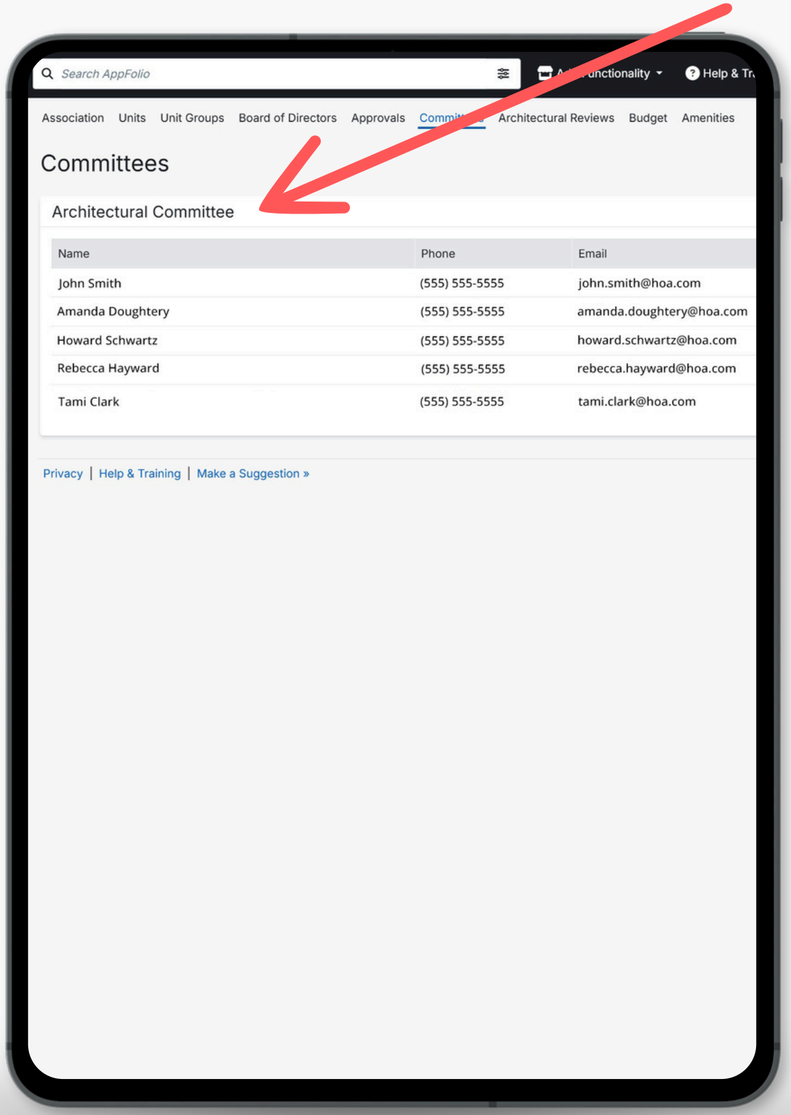
When a new **Architectural Request** is uploaded to the Board Portal, you will receive an **email** to the email address on file with Brightstar.



Architectural Committee

Initial Setup

Brightstar will assist the Board in setting up the Architectural Committee. You do not need to be a Board Member to be a part of the Architectural Committee and see incoming requests.



01

Setup Your Architectural Committee

Let Brightstar know which homeowners are on the Architectural Committee at your association.

Note: If a committee member is not a Board member, they'll only have access to Architectural Request approvals. They will not have access to invoices and Board documents.

Home Page

Architectural Approvals

02 Architectural Request Home Page

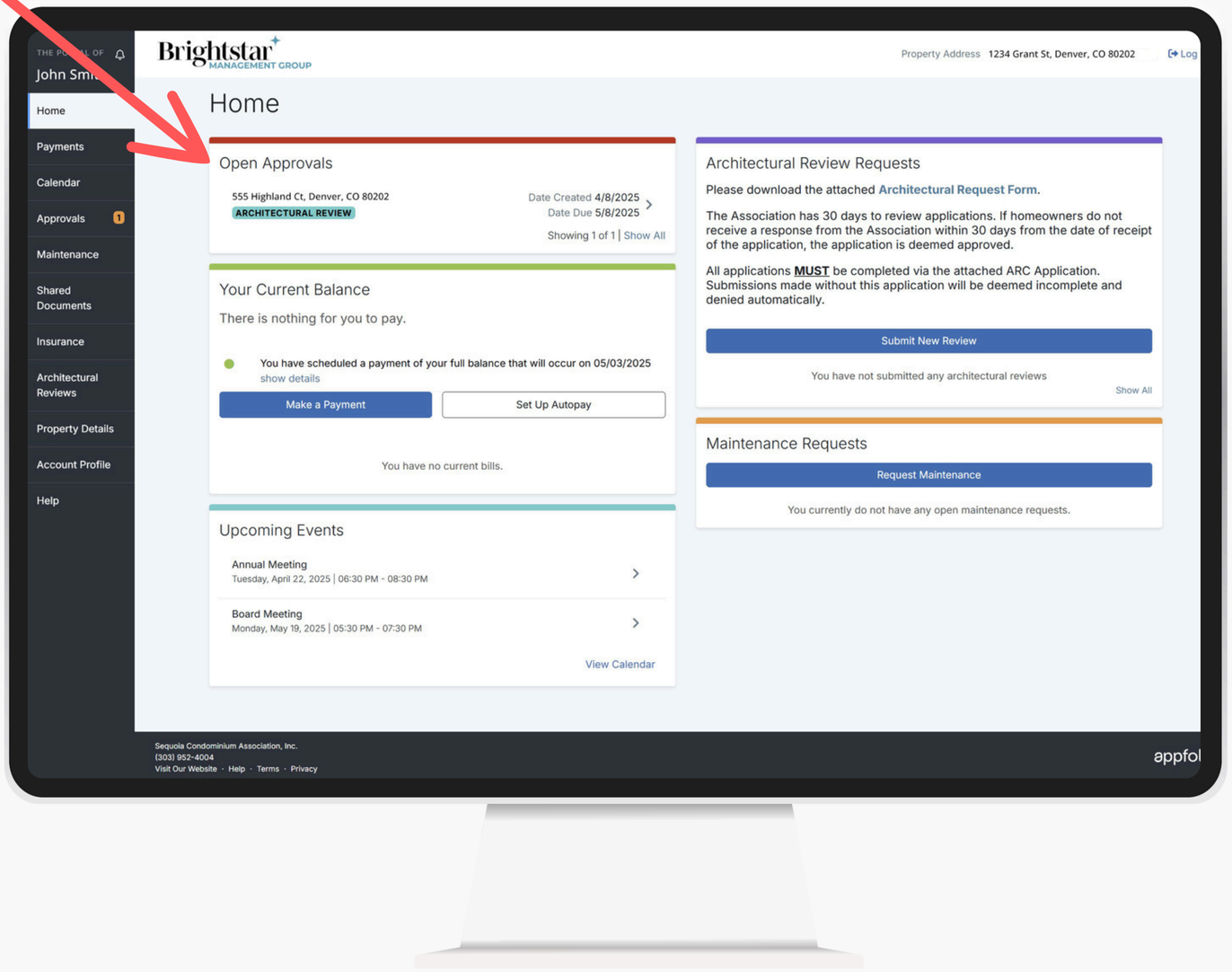
When a new Architectural Request is received, you will receive an email notification to the email you have on file with Brightstar. Click the link in the email to be directed to the new request.

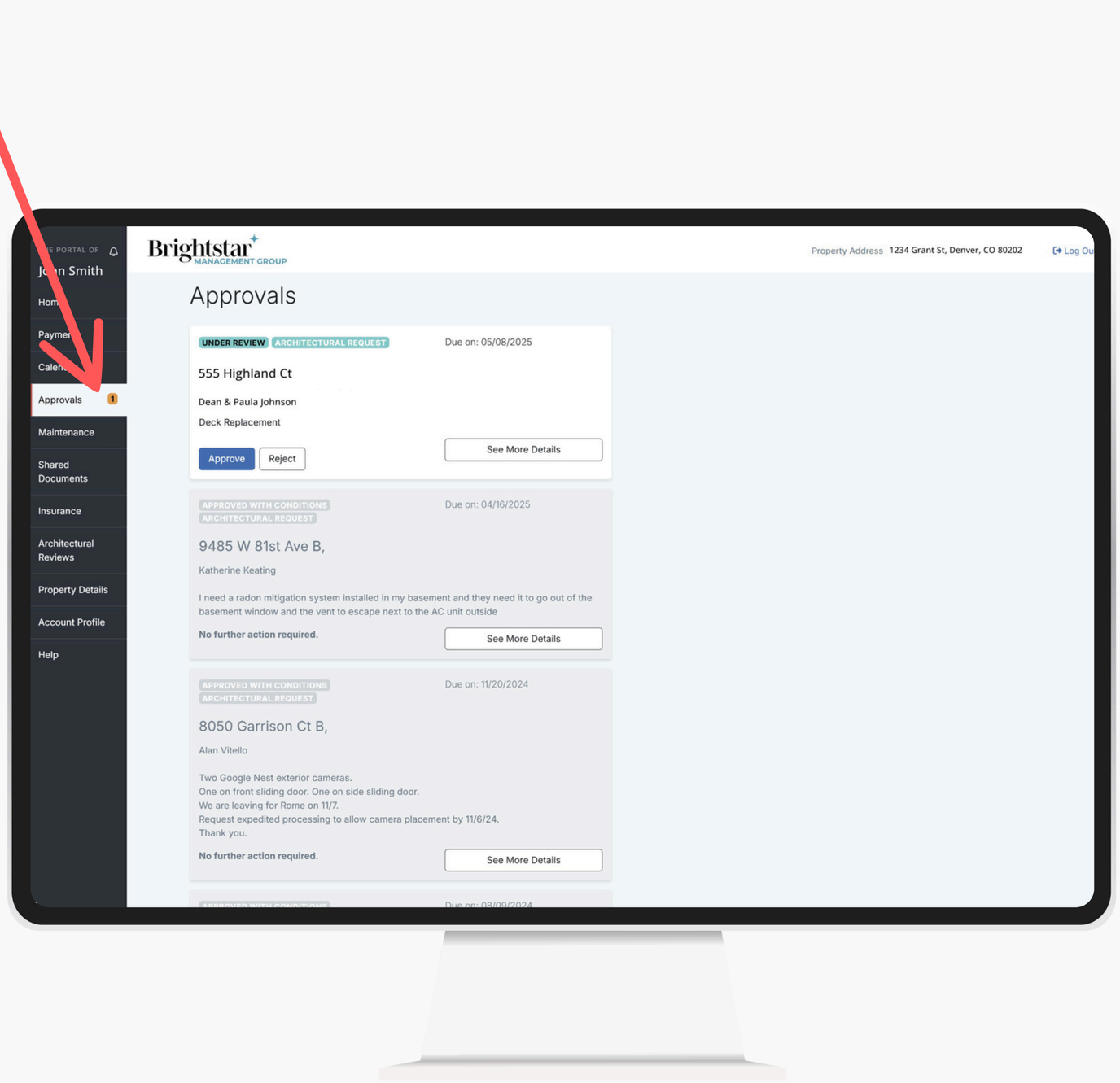
Portal Home Page:

- When a new Architectural Request is received, you will see it populate in the "**Open Approvals**" section on your Portal **Home Page**.

Access Your Portal:

https://brightstarmanagementgroup.appfolio.com/connect/users/sign_in





Approvals Page

Architectural Approvals

03 Architectural Approvals Page

To see all open Architectural Requests needing your vote, click the “**Approvals**” tab in the left-hand menu. This page shows every request that’s currently waiting for Committee’s approval — even ones not shown on the **Home** screen.

What You’ll See:

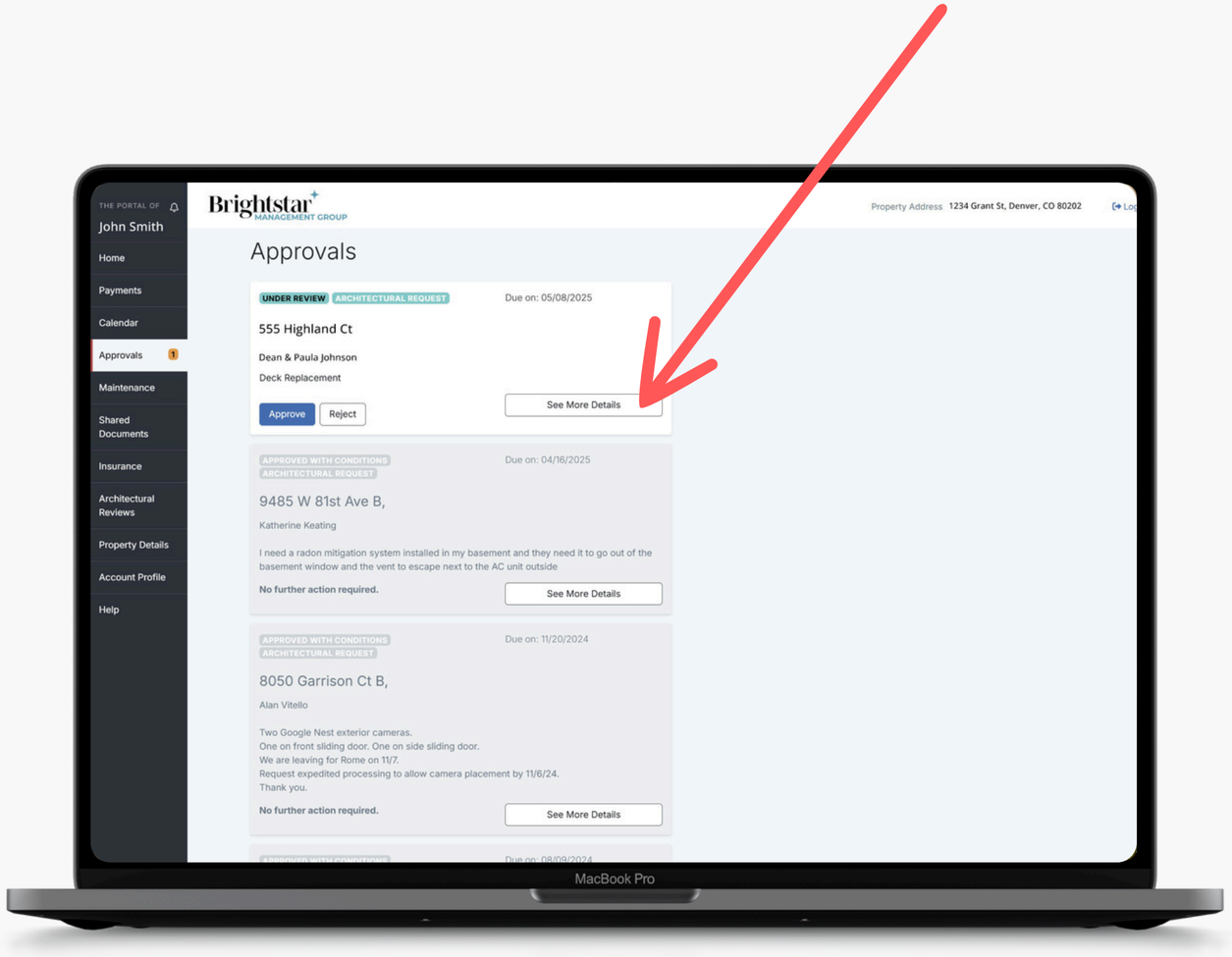
- Status of the Architectural Request
- Homeowner’s Name & Address
- An Approve or Reject button
- A “See More Details” button with more information on the request
- The date the approval needs to be completed by

Note: This page is especially helpful if you want to go back and review old requests. Once you **approve** or **reject** an invoice, it will still show for **1 month** on this page.

See More Details

Approval Details

From the **Home** or **Approvals** Page, you can click on any Architectural Approval to see more information.



04 Click the Request

You'll be taken to a detailed request screen showing:

- The Due Date of the Architectural Request.
- The Current Voting Results of the Approval.
- Attachments such as the Request Form, Blueprints, Drawings, etc.
- A Message Thread Where Committee Members can Post Comments to the other Committee Members and Brightstar.

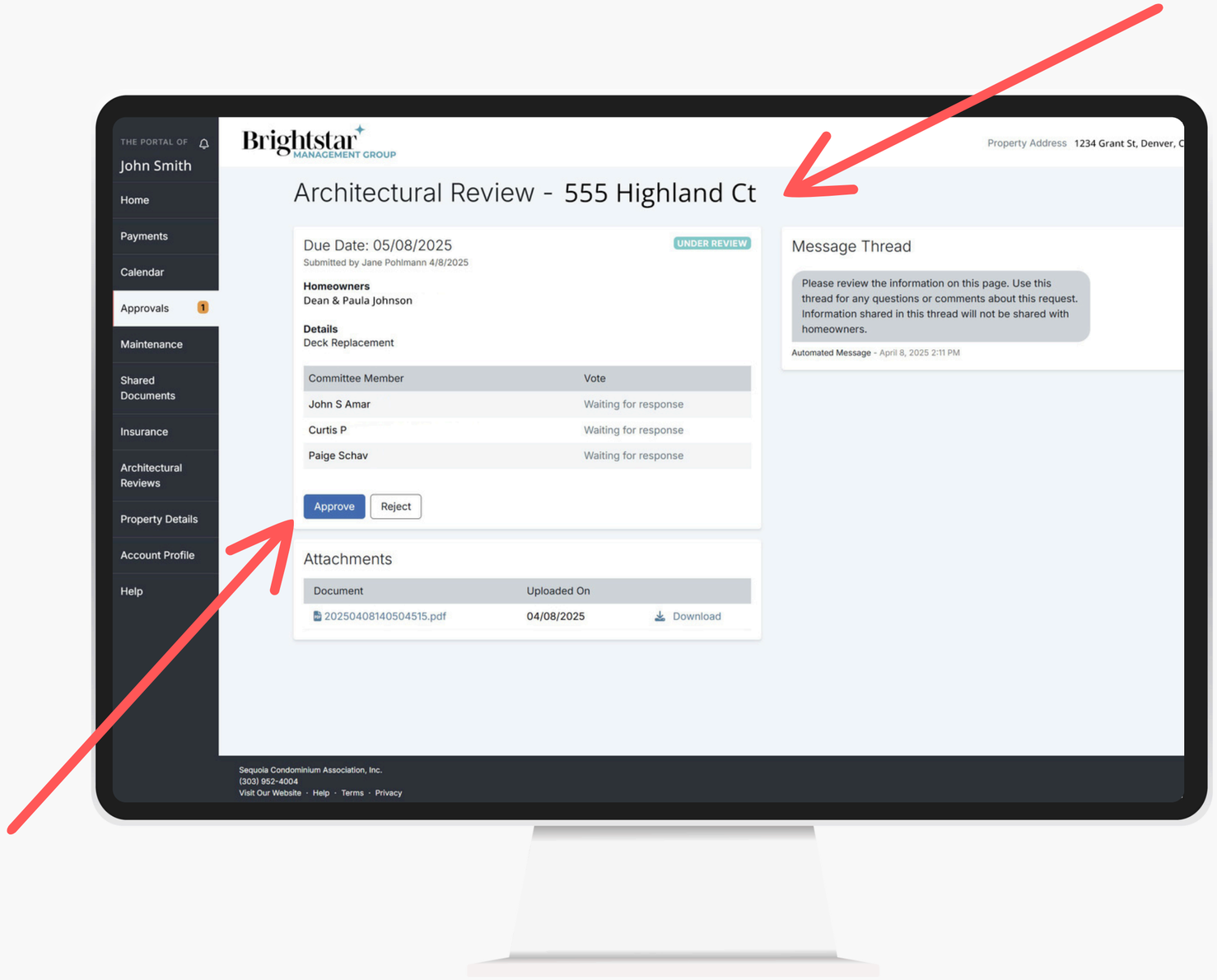
Approval Details Page

Architectural Approvals

05 Architectural Request Details Page

On the Details Page you'll be presented with the following information:

- Homeowner Name & Address.
- The Due Date for Approval or Denial.
- Details of the Request such as the Requested Project & Notes from the Homeowner.
- Attachments such as the Architectural Request Form, Blueprints, Drawings, Product Brochures, etc.
- A Message Thread Where you can Message the Committee and Brightstar for More Information or Opinions About the Request.
- An Approve or Reject Button to Decision the Request.



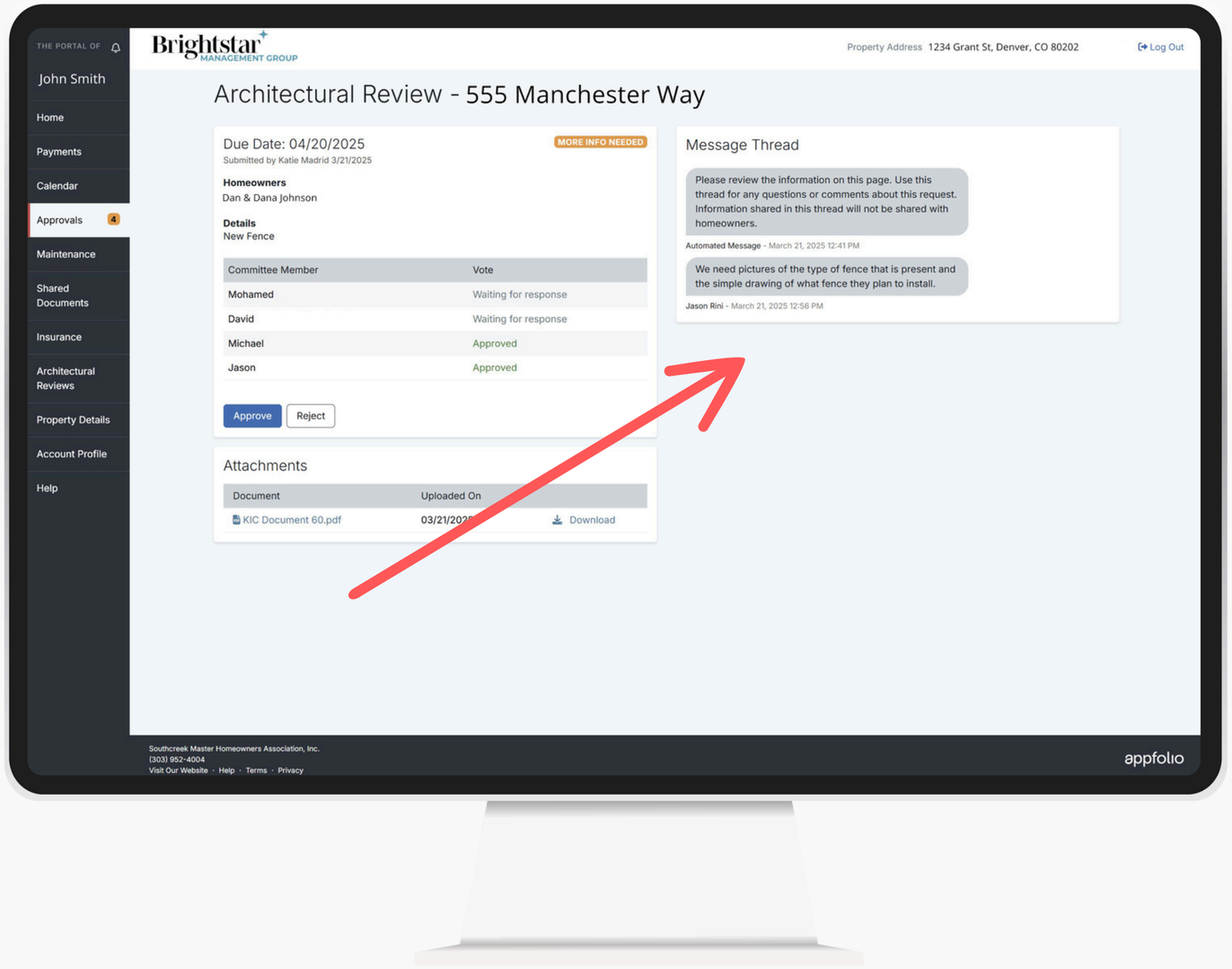
Message Thread

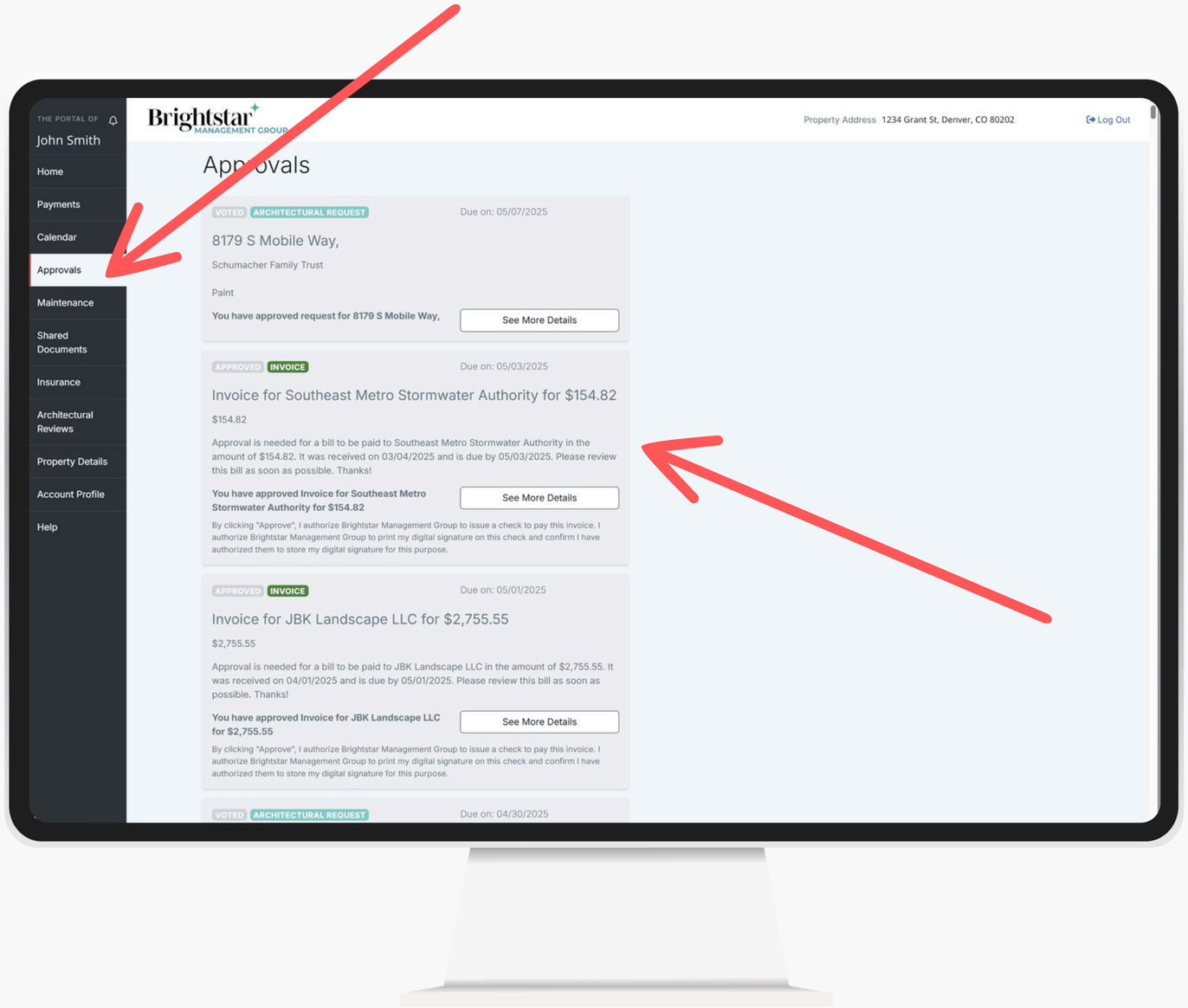
Architectural Approvals

06 Add Comments and Messages

- The **Message Thread** is where you can add comments or request additional information from the homeowners so you can complete your review.
- Adding a message is an easy way to communicate your thoughts on a particular request with other Committee members.

Please Note: Homeowners do not have access to the Message Thread. Messages are only shared between the Architectural Committee and Brightstar.





Follow Up

Architectural Approvals

07 Follow Up on Past Requests

Once you've voted on an Architectural Request, you can follow up and see where the request is in the process.

Where to Go:

- Log back into your Portal and click on the "**Approvals**" tab.
- Completed approvals will be **Greyed** out.
- In the top left of each approval, you can see the **status** of the approval:
  - Voted
  - Approved
  - Denied
  - More Information Needed

Note: Once you have voted on an approval, it will be greyed out in your Portal. You can click "**See More Details**" to view the Voting Details of the Committee.

Board Member Documents

Review Contracts, Financials, Tax Returns, & More

Board Members have access to additional, sensitive association documents that are not shared with the homeowners.



Shared Documents

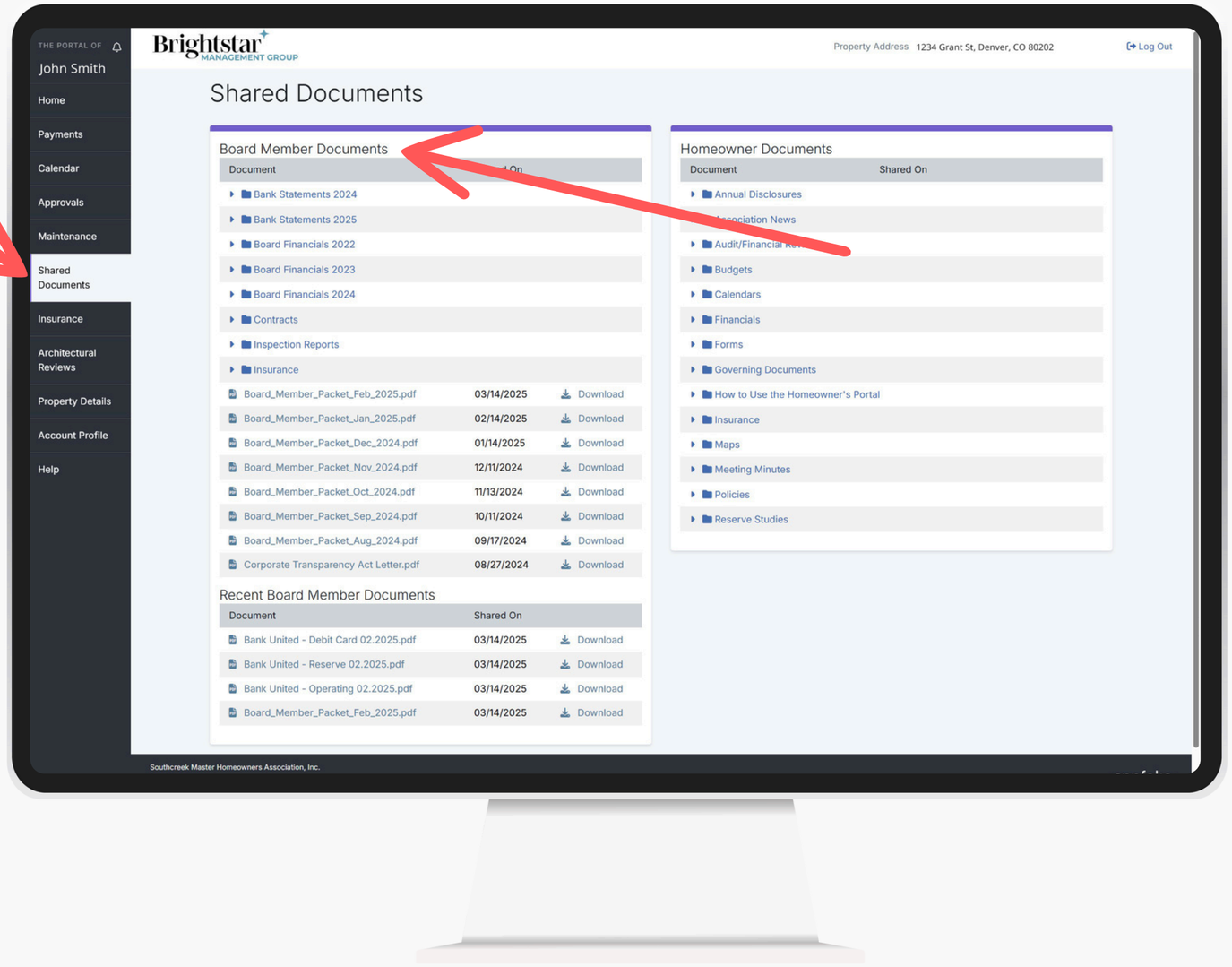
Board Documents

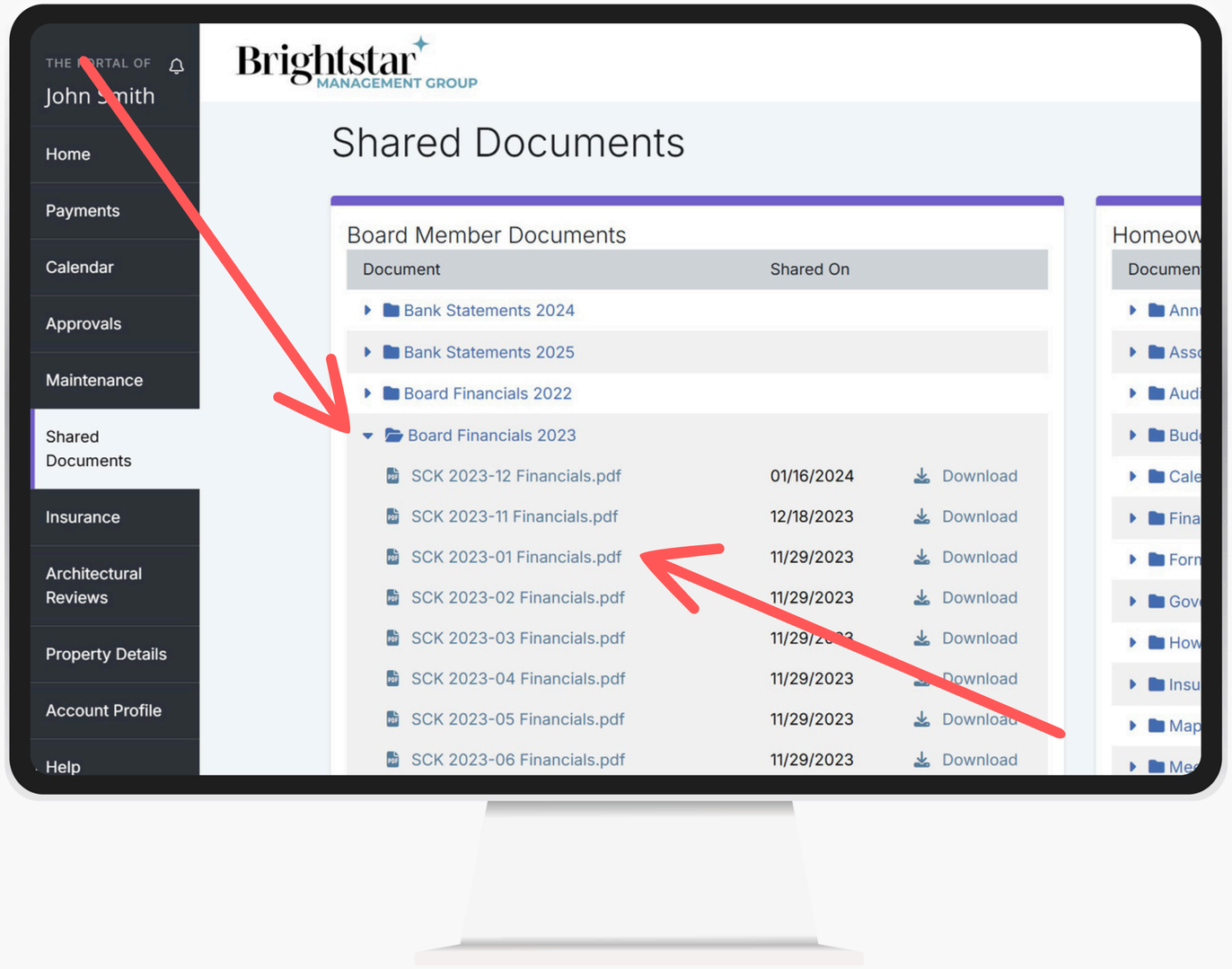
01 View Board Member Only Documents

- Once you log into your Portal, click “**Shared Documents**” in the left-hand navigation bar.
- You’ll be taken to the Shared Documents page with two Columns:
  - Board Member Documents
  - Homeowner Documents

Board Member Documents:
The Board Member Documents section contains documents such as full financials, association contracts, tax returns, and other documents with sensitive information that cannot be shared with the homeowners.

Homeowner Documents:
The Homeowner Documents section contains all the required documents that need to be made available to homeowners in your association. Financials in this section have been edited to remove bank account information and other information that cannot be publicly shared with homeowners.





View Individual Files

Board Documents

02 View or Download Documents

Brightstar organizes your documents in folders to make them easier to find. If you want to make changes to how the documents are organized, email your manager to make the changes.

Click the Folder:

- Click on a folder to expand the folder and show the documents contained inside.

View or Download the Document:

- Click on the **blue** **"File Name"** to open the document in your internet browser.
- You can also download the document to your device by clicking "**Download**".

Board Calendar

Add events, meetings, or announcements for Board Members

Brightstar has the ability to add calendar events that are only viewable by the Board.



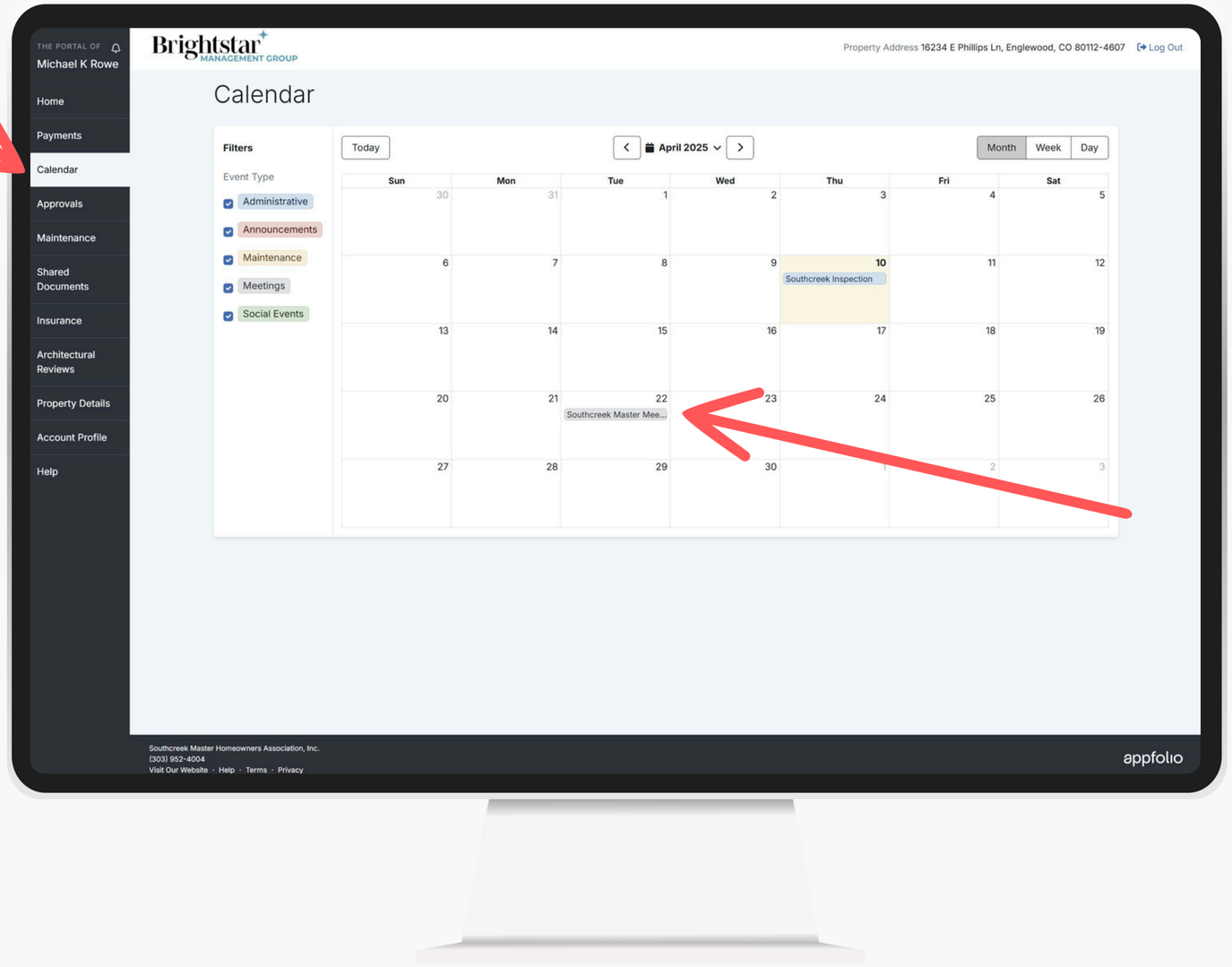
Calendar

Board Calendar

01 Board Member Calendar

Board Member Notices, Events, & Meetings:
Brightstar has the ability to create calendar events that are only viewable by the Board of Directors. These events will show up with the community calendar events but will only populate on Board Member Portals.

Note: Ask your manager to add events for Board Members only. This is a great way to share meeting invites and announcements that do not need to be shared with homeowners.



Help

Get the Help You Need

If you need assistance, please don't hesitate to call, email, or stop by our office.



Thank You