



Pay Online Guide

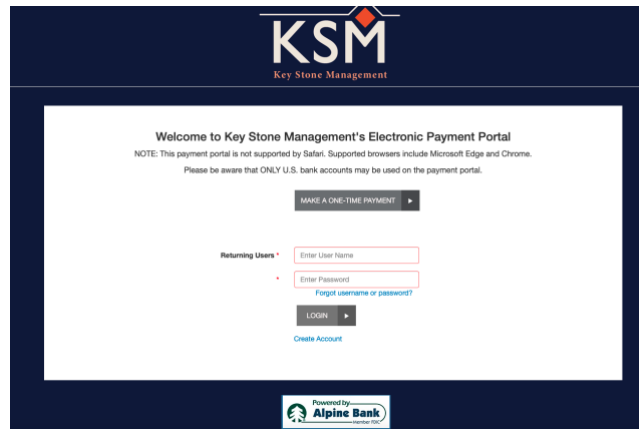
Welcome to the Pay Online guide for Key Stone Management, here we will walk you through creating an account and setting your payment options.

To get started, you need to create your account with a username and password.

How to create an account:

1. Please log onto Key Stone Managements pay online portal page at:
<https://smartpay.profitstars.com/express/Key%20Stone>

The below screen will appear.



2. Click on "Create Account" link and the below screen will appear:

Is Business Account: ☐

Username:

First Name:

Last Name:

Secret Question:

Secret Answer:

Confirm Secret Answer:

Address:

Suite/APT#:

City:

State/Region:

Postal Code:

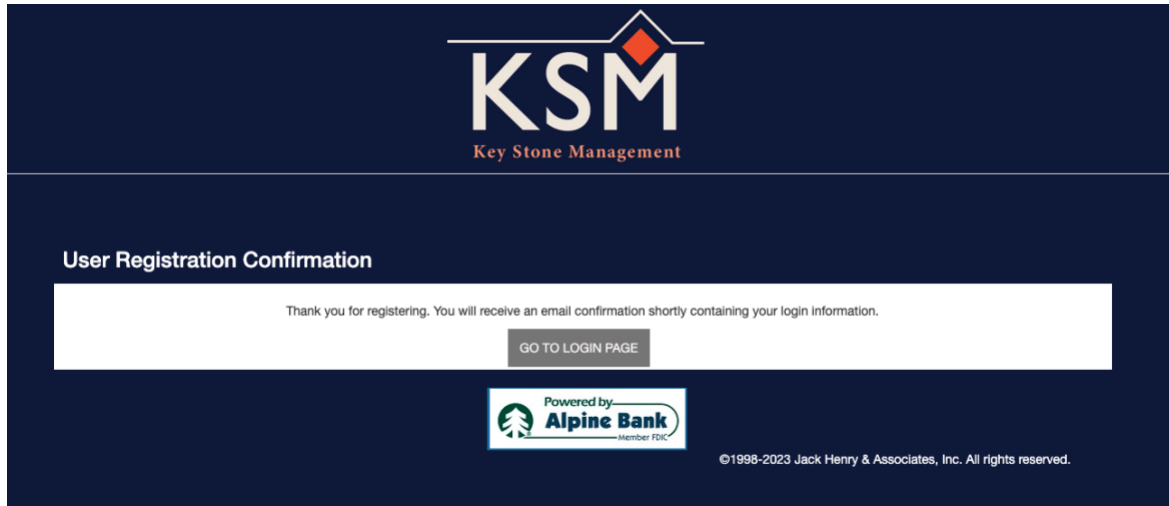
Country:

Phone:

Email Address:

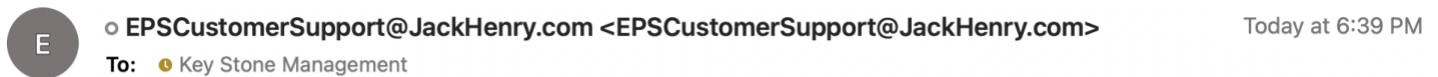
Confirm Email Address:

3. Complete all fields (note down your username and secret answer) and click “I’m not a robot” then “REGISTER.” You will see the “User Registration Confirmation” message as below.



Check your email – You will receive an email from **EPSCustomerSupport@JackHenry as exempld below.

4. Click on the link provided in your email to create your personal password.



Your registered user account has been established. To complete account setup, you must create a password.

Click the link below to create your password. Because this link will expire in 24 hours, you should create your new password immediately.

<https://smartpay.profitstars.com/auth/PasswordReset?id=cb66ad42-a6e3-4b6b-8485-ed7af5e6d972>

5. The following page will open in your browser:

The image shows a 'Security Challenge' form. It has a title bar 'Security Challenge'. Below it is the instruction: 'Answer the security question below to reset your password.' The question is 'Son's name'. There is a text input field with the placeholder 'Enter Answer'. At the bottom is a green button labeled 'Submit Answer'.

6. Enter your secret Answer and click “Submit Answer”.
7. Create your password, confirm it, and click “Update Password.”

Update Password

Please enter and confirm a new password.

New Password

Confirm Password

Update Password

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8. The below screen will appear, close this page down and return to the login screen.

Password Update Complete

Your password has been updated. Close this browser tab and return to the login page.

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9. Click on “GO TO LOGIN PAGE”

KSM

Key Stone Management

User Registration Confirmation

Thank you for registering. You will receive an email confirmation shortly containing your login information.

GO TO LOGIN PAGE

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Congratulations, your account has now been created!

Let's go ahead and set your account up for payments.

1. If your browser is still open you simply click on the "GO TO LOGIN PAGE", if you closed your browser then you need to go back to <https://smartpay.profitstars.com/express/Key%20Stone>
2. Now enter your username and password and click "LOGIN", the following screen will appear:

The screenshot shows a user dashboard with a dark blue header. The header includes a welcome message "Welcome, [redacted]" with links "Not You?" and "Logout". To the right are buttons for "MAKE A PAYMENT", "EDIT PAYMENT OPTIONS", and "EDIT PROFILE". Below the header, there are two main sections: "Scheduled Transactions" and "Transaction History". Both sections have a table with columns for transaction details. The "Scheduled Transactions" table has columns: Edit, Next Payment Date, Amount, Location, and # of Payments. The "Transaction History" table has columns: Transaction D..., Amount, Payment Type, Status, Location, and Description. Both tables show "No records found". At the bottom of the dashboard, there is a "FULL TRANSACTION HISTORY" button and a logo for "Powered by Alpine Bank - Member FDIC". The footer text reads "©1998-2023 Jack Henry & Associates, Inc. All rights reserved."

3. Click on the "EDIT PROFILE" tab to add your banking details, scroll down to the bottom of the page and click on "+ Add Payment Option" tab.

The screenshot shows the "Payment Options" section of the dashboard. It features a large button labeled "+ Add Payment Option". Below this button, there is a logo for "Powered by Alpine Bank - Member FDIC".

Once clicked, the area will expand to the below. Enter your banking details according to the account you want the dues payments to be paid from. Once done click "ADD PAYMENT".

A confirmation will now be seen, Checking: xxxxxxxxxxx1234 – Checking Account ending in 1234

4. Go back to the top of the page and click the "BACK" button.
You should now be on the Welcome page.
5. Now you're ready to make your payment and set up a recurring payment if you wish to.

*******Scroll down to follow a step-by-step guide to make your payments.**

Let's make your first payment!

1. If you closed your browser, you need to open the online payment link again and enter your newly created username and password and click "LOGIN"
2. Once logged in you will be on the Welcome (your Name) page. Click "MAKE A PAYMENT" and the below screen will open.

The screenshot shows a 'Make Payment' form with the following fields and options:

- Pay This Amount ***: A text input field with the value 'Required'.
- Pay to ***: A dropdown menu with the value '-- Select --'. To its right is a checkbox labeled 'Remember this selection'.
- Pay From Account ***: A dropdown menu with the value '-- Select --'. To its right is a button labeled 'ADD PAYMENT OPTION'.
- Payment Date**: A date input field with the value '3/30/2023' and a calendar icon.
- Below the date field is a link: 'Click here if you would like to make this a recurring payment'.
- At the bottom are two buttons: 'CANCEL' and 'CONTINUE'.

3. "Pay This Amount", enter the selected amount to pay.
4. **Pay To**: There is a dropdown menu with various associations to choose from, please choose your relevant association name to ensure your payment goes directly into your associations Bank Account.
5. The next line says "Customer Account #" please enter your physical HOA address. Key Stone Management may allocate a unique customer number account number that be reflected on your statement which you can enter if you wish to. **Once you receive this account number you can edit your payment profile by including the unique customer account # moving forward.
6. **NOTE**: The next line is "Payment Date", if you **do not** want a recurring payment plan then click on the small calendar tab. The recurring payment option will disappear. You can now choose the date you wish to pay and proceed to click "CONTINUE".
7. If you want to establish a recurring payment, then click "Click here if you want to make this a recurring payment" straight away after selecting "Pay From Account". The following screen will appear:

The screenshot shows a form for setting up a recurring payment with the following fields and options:

- At the top is a link: 'Click here if you would like to make this a recurring payment'.
- Frequency ***: A dropdown menu with the value 'Once a Month'.
- Payment Day**: A dropdown menu with the value 'Last Day'.
- Start Date**: A date input field with the value '4/30/2023' and a calendar icon.
- # Of Payments ***: A text input field with the value '12'.
- Next Payment Date**: A date input field with the value '4/30/2023' and a calendar icon.
- Infinite Payment**: A checkbox that is currently unchecked.
- Include a Single Payment Now**: A checkbox that is currently unchecked.
- At the bottom right is a question mark icon.

8. “Frequency” select “Once a Month”
9. “Payment Day” select the day of the month that you want to make payment. You can select any day of the month, however, the specific day may affect whether you need to select the “Include a single Payment Now” block or not.
10. The “Start Date” will automatically update to the day you selected above it.
11. In the “# of Payments” space, enter the number of months remaining for this year if you want to only pay for that year. The onus will be on you to update this at the beginning of each year. To avoid remembering to do this we would suggest you tick the “Infinite” option which will ensure that your payments always continue and will only discontinue upon you not been a member of the association.
12. Verify the “Next Payment Date” to ensure when the payment is scheduled for.
13. When do you need to select the “Include a single Payment Now” tab? See examples below.

EXAMPLES

In the 2 examples below we will assume the following information:

Current date is March 29th, 2023, and I have not paid my April dues yet.

Example 1:

I want to pay dues monthly on the 5th day of each month for that given month. i.e., I’m paying on the 5th of April for April’s dues and so on.

Do the following: Select once a month frequency, payment day will be 5, start date will be 4/05/2023, make 9 recurring payments on April 5, May 5, June 5, July 5, August 5, September 5, October 5, November 5, and December 5. This will make sure I’ll be paid up until the end of December 2023 without the need to select “Include a single Payment Now”.

** Your scheduled payments will be as below:

Click here if you would like to make this a recurring payment

Frequency *	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">Once a Month▼</div>
Payment Day	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">5▼</div>
Start Date	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">4/5/2023📅</div>
# Of Payments *	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">9▼</div>
Next Payment Date	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">4/5/2023📅</div>
Infinite Payment	<input type="checkbox"/>
Include a Single Payment Now	<input type="checkbox"/> ?




Example 2

I want to pay dues monthly on the 26th day of each month for the next month. i.e., I want to pay 4 to 5 days before the 1st of the month when my assessment is due as invoiced.

Do the following: Select once a month frequency, payment day will be 26, start date will be 4/26/2023, make 8 recurring payments on April 26, May 26, June 26, July 26, August 26, September 26, October 26, and November 26. This will make sure I'll be paid up until the end of December 2023, however, I still need to pay for April. You **must** select "Include a single Payment Now" for April 2023.

** Your scheduled payments will be as below:

Click here if you would like to make this a recurring payment

Frequency *	Once a Month ▼
Payment Day	26 ▼
Start Date	4/26/2023 
# Of Payments *	8
Next Payment Date	4/26/2023 
Infinite Payment	<input type="checkbox"/>
Include a Single Payment Now	<input checked="" type="checkbox"/> 

NOTE: Dues are payable in full on or before the 1st day of each month. Please refer to your associations Collection Policy to determine when assessments are due and by which date they will be regarded as late.

14. Once done, click "CONTINUE" to review your payment t before submitting.
15. Review your choices and if satisfied, click "AGREE AND SUBMIT", if not, go back and make adjust your choices.
16. Both you and the management company will be notified via email that payment was made.

**If you need further assistance, please email us at office@keystoneman.com

Congratulations are now setup for online payments!