

GENERAL MANAGER UPDATE: MEMBER PORTAL

May 28, 2021



THE NEED FOR A MEMBER PORTAL

- The Board, Committees and several members expressed the desire for a secured Member Portal and a better way to access account and Association information.
- Staff and consultants reviewed over 12 different software options, including three "best in class" products to see which would meet the needs of the Association best.
- Member Portal software is also to replace the current no-longer-supported accounting software as well as Architectural Standards and Covenants software.
- After months of research, staff and consultants selected eUnify as the new Member Portal software.





HOW DOES eUNIFY BENEFIT THE MEMBERSHIP?

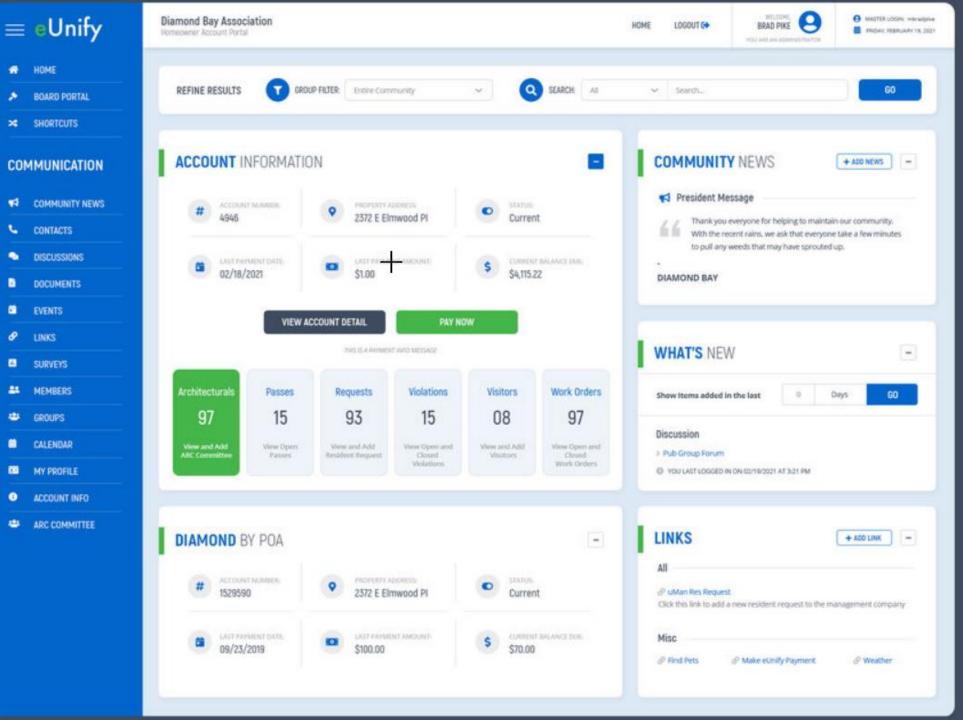
- Easy, convenient web access 24/7 via the website or a mobile app
- Online payment for Annual Assessments, fees and fines
- Update your profile directly including contact information and mailing address
- See a complete history of your payments, permits and violations
- Access Association documents securely and keep Association documents within the membership
- Convenient same login as your ShopTD account



SAMPLE MEMBER PORTAL HOMEPAGE

- Current balance
- Last payment
- Pay Now button
- Robust left navigation
- Streamlined user experience

Note: not all fields shown in this sample will apply to Tahoe Donner



SAMPLE MEMBER PORTAL CONTACT PAGE

- Easily view current information on record
- Easily edit mailing address and contact info
- Upload photo
- Change personal preferences
- Change login and password

Note: not all fields shown in this sample will apply to Tahoe Donner

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Diamond Bay As Homeowner Acco					Log Out 🗭 🤱
Members - Adam J	ones				
Done					
General				Spouse	My Picture
			Edit General	Ed	it Spouse Edit
Name:	Adam Jones			Name:	
Site Admin:				Employer:	
Account Id:	905262			Email:	
Address:	Mailing Address	Unit Address		Alt Email:	
	Adam Jones 2618 E Virgo Pl Test	2618 E Virgo Pl		Home Phone:	No Picture Avail
	Chandler, AZ 85249 US	Chandler, AZ 85249 US		Mobile Phone:	
				work Phone:	Settings
Email Address:	tester@eunify.net	SMS Email:			Preferences
Alt Email:				Children	Datas as Carting
Home Phone:		Home Fax:			Add Child
Mobile Phone:	123-045-6789 Verizon	Pager:		Action Name Birthday School Grade Pic	Change Login/Pass
Business Phone:		Business Fax:		No items!	

SAMPLE MEMBER PORTAL ACCOUNT DETAIL PAGE

- Easily view current balance and utilize pay now button
- See payment/account history
- Sort by fee/payment type

Note: not all fields shown in this sample will apply to Tahoe Donner

Arrow Reversion Introduction Introduction <	
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Ledgers	
Transactions Fines Assessments Statements	
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Tran Date Tran Type Description Tran Amount Reference 11/18/2020 Bal Fwd \$0.00	
12/16/2020 Admin Fee HOA Arc Fee \$50.00	
12/24/2020 Admin Fee HOA Arc Fee \$50.00	
12/29/2020 Miscellaneous Credit Transfer Payment (\$15.00) 12/18 from Acct: 12/18 from Acct:	

MEMBER SERVICES ENHANCEMENT

- eUnify will allow Member Services staff to access your account information (not previously available) to support the vast majority of membership needs, reducing the need to transfer to another department.
- Member Services will now have access to all point-of-sale records and member account records, truly advancing the department to be a one-stop shop for the membership.



ACCOUNTING EFFICIENCIES

- Reduce Annual Assessment billing process from multiple days to a few clicks of the mouse
- Pay within the Member Portal with payments automatically posting to member accounts (currently manual and not real time)
- Members can easily select to go paperless
- Fulfillment of paper account mailing/statements automated through print house at a cost
- Full banking integration, reducing the number of places needed to log in to view banking records including viewing check images or deposit data
- Vendor Portal allows for electronic submission, and paperless accounting including coding and approving
- Vendor checks can be e-signed, eliminating potential delay and simply less paper handling
- Simplify customized reporting process
- Simplify journal entry creation
- Budget and forecast modules with integrated notations to each account

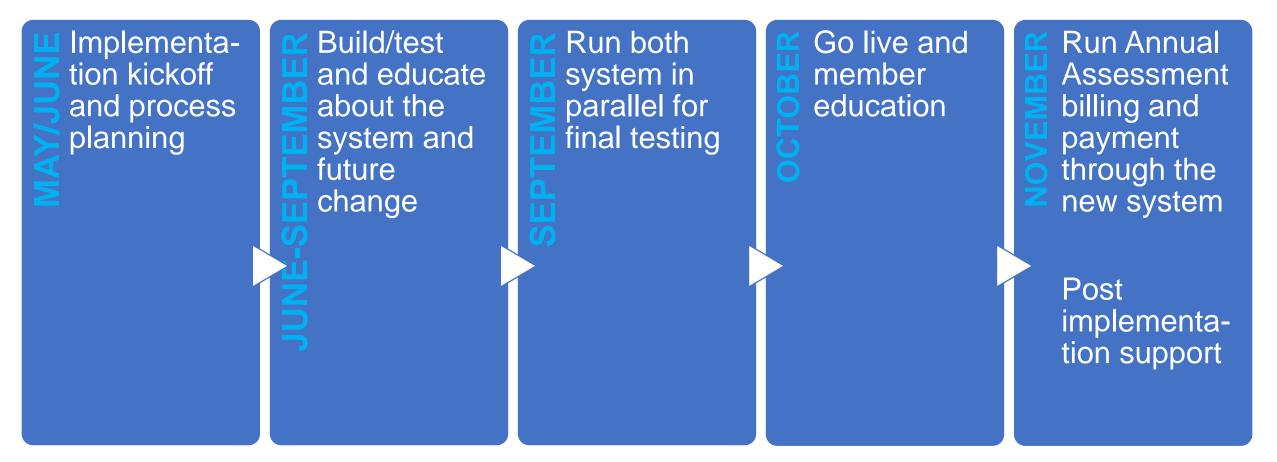


ASO/COVENANTS EFFICIENCIES

- Consolidated member info to limit discrepancies
- Ability to access "good standing" status from Accounting
- Cloud software, includes heat mapping
- Portal offers:
 - Online payments of assessment, permits, fines benefit both member and ASO to see current status
 - Members can submit documents and requests through portal
 - Board and Committee can access meeting documents for prep/review
 - Ability to post neighbor notification docs onto portal to view
- Ease of creating letters, PDF to emails, mailing and do mass notifications
- Build reports on any data field
- Track items on each property home screen (registered STR, ADU, Held in Abeyance, etc)



eUNIFY ROLLOUT TIMELINE





QUESTIONS?

THANK YOU

