



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

The screenshot displays the Diamond Bay Association Homeowner Account Portal. The interface is clean and modern, with a blue header and a prominent left navigation menu. The main content area is divided into several sections: Account Information, Community News, What's New, and Diamond by POA. The Account Information section provides a quick overview of the user's account, including account number, property address, status, last payment date, last payment amount, and current balance due. Below this, there are buttons for 'View Account Detail' and 'Pay Now'. The 'What's New' section features a 'Show Items added in the last' filter set to 0 days. The 'Diamond by POA' section shows account details for a different property. The right sidebar contains 'Community News' with a 'President Message' and 'Links' with various utility links.

Navigation Menu:

- HOME
- BOARD PORTAL
- SHORTCUTS
- COMMUNICATION
 - COMMUNITY NEWS
 - CONTACTS
 - DISCUSSIONS
 - DOCUMENTS
 - EVENTS
 - LINKS
 - SURVEYS
- MEMBERS
- GROUPS
- CALENDAR
- MY PROFILE
- ACCOUNT INFO
- ARC COMMITTEE

Header: Diamond Bay Association Homeowner Account Portal | HOME | LOGOUT | WELCOME BRAD PIKE | MASTER LOGIN | FRIDAY, FEBRUARY 19, 2021

REFINE RESULTS | GROUP FILTER: Entire Community | SEARCH: All | Search... | GO

ACCOUNT INFORMATION

ACCOUNT NUMBER: 4946	PROPERTY ADDRESS: 2372 E Elmwood Pl	STATUS: Current
LAST PAYMENT DATE: 02/18/2021	LAST PAYMENT AMOUNT: \$1.00	CURRENT BALANCE DUE: \$4,115.22

VIEW ACCOUNT DETAIL | PAY NOW

THIS IS A PAYMENT INFO MESSAGE

Architecturals: 97 (View and Add ARC Committee)	Passes: 15 (View Open Passes)	Requests: 93 (View and Add Resident Request)	Violations: 15 (View Open and Closed Violations)	Visitors: 08 (View and Add Visitors)	Work Orders: 97 (View Open and Closed Work Orders)
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COMMUNITY NEWS | + ADD NEWS

President Message

Thank you everyone for helping to maintain our community. With the recent rains, we ask that everyone take a few minutes to pull any weeds that may have sprouted up.

DIAMOND BAY

WHAT'S NEW

Show Items added in the last: 0 Days | GO

Discussion

- Pub Group Forum

YOU LAST LOGGED IN ON 02/19/2021 AT 3:21 PM

DIAMOND BY POA

ACCOUNT NUMBER: 1529590	PROPERTY ADDRESS: 2372 E Elmwood Pl	STATUS: Current
LAST PAYMENT DATE: 09/23/2019	LAST PAYMENT AMOUNT: \$100.00	CURRENT BALANCE DUE: \$70.00

LINKS | + ADD LINK

- uMan Res Request: Click this link to add a new resident request to the management company
- Misc
 - Find Pets
 - Make eUnify Payment
 - Weather

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

The screenshot displays the member portal interface for Adam Jones. On the left is a blue navigation sidebar with icons and labels for Home, Community News, Classifieds, Contacts, Discussions, Documents, eForms, Events, Links, Surveys, Members, Groups, Calendar, My Profile, and Account Info. The main content area is titled "Members - Adam Jones" and features a green "Done" button. It is divided into several sections: "General" (with an "Edit General" button), "Spouse" (with an "Edit Spouse" button), "My Picture" (with an "Edit Picture" button and a silhouette placeholder labeled "No Picture Available"), and "Settings" (with buttons for "Preferences", "Privacy Settings", and "Change Login/Password"). A "Children" section at the bottom has an "Add Child" button and a table with columns for Action, Name, Birthday, School, Grade, and Pic, currently showing "No items!". The top right corner includes a "Log Out" link and a user profile for Adam Jones.

Diamond Bay Association
Homeowner Account Portal

Log Out **Adam Jones**
u: AdamJones

Members - Adam Jones

Done

General [Edit General](#)

Name: Adam Jones
Site Admin:
Account Id: 905262
Address: **Mailing Address** **Unit Address**
Adam Jones 2618 E Virgo Pl
2618 E Virgo Pl Chandler, AZ 85249
Chandler, AZ 85249 US
Email Address: tester@eunify.net SMS Email:
Alt Email:
Home Phone: Home Fax:
Mobile Phone: 123-045-6789 Verizon Pager:
Business Phone: Business Fax:

Spouse [Edit Spouse](#)

Name:
Employer:
Email:
Alt Email:
Home Phone:
Mobile Phone:
Work Phone:

My Picture [Edit Picture](#)

No Picture Available

Settings

[Preferences](#)
[Privacy Settings](#)
[Change Login/Password](#)

Children [Add Child](#)

Action	Name	Birthday	School	Grade	Pic
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

Diamond Bay Association
Homeowner Account Portal

View Account

Adam Jones

Community Address: 2618 E Virgo Pl
Chandler, AZ 85249

Mailing Address: 2618 E Virgo Pl Test
Chandler, AZ 85249

Account: **905262**

Status: Current

Last Payment Date: 12/29/2020

Last Payment Amount: \$15.00

Current Balance: \$200,775.27

[Pay Now](#)

Vio: 63 ARC: 35 Passes: 21 Requests: 48

Ledgers

Transactions Fines Assessments Statements

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 12/18 from Acct:	(\$15.00)	

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

MAY/JUNE

Implementation kickoff and process planning

JUNE-SEPTEMBER

Build/test and educate about the system and future change

SEPTEMBER

Run both system in parallel for final testing

OCTOBER

Go live and member education

NOVEMBER

Run Annual Assessment billing and payment through the new system

Post implementation support



QUESTIONS?

THANK YOU

