



TAHOE DONNER<sup>SM</sup>

# GENERAL MANAGER

# UPDATE: MEMBER PORTAL

May 28, 2021



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# 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

# 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 key details for 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 Community News section features a 'President Message' and a 'WHAT'S NEW' section with a search filter. The Diamond by POA section provides similar account information for a different property. The left navigation menu includes options for HOME, BOARD PORTAL, SHORTCUTS, COMMUNICATION, COMMUNITY NEWS, CONTACTS, DISCUSSIONS, DOCUMENTS, EVENTS, LINKS, SURVEYS, MEMBERS, GROUPS, CALENDAR, MY PROFILE, ACCOUNT INFO, and ARC COMMITTEE. The top right corner shows the user's name (BRAD PIKE), a WELCOME message, and a LOGOUT button. The bottom right corner features a 'LINKS' section with various utility links like 'uMan Res Request', 'Find Pets', 'Make eUnify Payment', and 'Weather'.

**Navigation Menu:**

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

**Account Information (Top):**

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

**Community 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.

**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

**Account Information (Bottom):**

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

**Summary Cards:**

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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**Links:**

- 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 text for: Home, COMMUNICATION (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) containing fields for Name (Adam Jones), Site Admin, Account Id (905262), Address (split into Mailing Address: Adam Jones, 2618 E Virgo Pl Test, Chandler, AZ 85249 US; and Unit Address: 2618 E Virgo Pl, Chandler, AZ 85249 US), Email Address (tester@eunify.net), SMS Email, Alt Email, Home Phone, Mobile Phone (123-045-6789 Verizon), Business Phone, Home Fax, Pager, and Business Fax; "Spouse" (with an "Edit Spouse" button) containing fields for Name, Employer, Email, Alt Email, Home Phone, Mobile Phone, and Work Phone; "My Picture" (with an "Edit Picture" button) showing a silhouette and "No Picture Available"; and "Settings" (with buttons for "Preferences", "Privacy Settings", and "Change Login/Password"). At the bottom, a "Children" section (with an "Add Child" button) shows a table with columns: Action, Name, Birthday, School, Grade, Pic, and a "No items!" message.

# 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

