



CSI COMMUNITY MANAGEMENT

APPFOLIO BOARD TRAINING FAQ

What accounting software will you be using with AppFolio and how does it work?

AppFolio has everything. They will be housing all of the accounting side as well

Are the instructions going to be ARC instructions going to be customized for each neighborhood?

Yes, each HOA can change the verbiage and add their own rules

Can this feature omit the need for coupons?

In the next year we will be pushing electronic statements and trying to move to one statement a year.

Can sub-associations also have customized instructions/contacts for ARC.

If the sub is set in the system it looks like we can edit it.

Will this mean dropping alliance?

No they are our banking partner

Will we be able to add comments to approvals?

Yes. There will be a comments section viewable to CSI and fellow board members.

Does CSI have to wait until all board members approve an item before it is considered approved?

Yes. We have to have unanimous approval.

Is there a message thread between the board/ARC committee and the homeowner?

Not at this time. However, CSI has a message thread with the homeowner portal and can relay anything from the board.

Can the board upload documents.

Not at this time.

Can you have varying permissions on documents to view them?

i.e. committees within a Board? CSI can share directly with specific individuals if needed, but there is currently not specific viewing permissions.

Are board members able to upload in the documents section?

(i.e. meeting minutes, agendas) Not currently.

Will HOA data and docs in current system port over to the new system?

Yes. We have been moving everything over since July

Will the Master Policy be posted in the insurance tab?

The master policy can be put under Shared Documents. AppFolio has noted our need to include that on the Insurance tab. Instructions to obtain the policy is also in the portal.

What about multi unit owners?

Can they have multiple in one account? Multi-unit owners will have one portal login where they can toggle between units.

Can we run reports from this system to pull renter info?

CSI can pull renter reports if needed.

Does CSI upload the homeowner information?

Yes, and the homeowner can add information as well

Will there be a directory?

CSI can pull a homeowner directory and share if needed.

Will other people in the neighborhood be able to see my contact information?

The directory can be customized to show or not show this information as each association needs.

Who updates calendar information for each community?

At this time CSI, it has been

What happens to coupon books and auto draft?

We will be moving to statement and we will still offer AAB e-checks (auto -draft) and CC payments.

Can homeowner/home lot accounts be linked to a map or community plat references?

i.e. our community has different CCRs depending on home location/section.

We are still working on this one.

Will payments update with dues increase?

Autopayments will not automatically increase. The homeowner needs to edit their current auto payment amount. This can be added in the dues increase letter to inform the homeowner.

Does that mean you remain with alliance operating system?

AAB will still be our banking partner and has integrations with AppFolio

Does this system generate out of compliance notices?

AppFolio allows for compliance tracking and communication. All compliance notices will be sent through AppFolio.

Can committee members who might not be board members get extra permission sets to their homeowner login to post events?

At this time events can only be posted by CSI employees.

Will a single approval from one board member be the final approval? so if we need full approval, can that be set or is that to be discussed in the message thread and then approved one time?

All board members will vote and the vote will need to be unanimous in order to be fully approved.

Will the HOA be able to see the message thread being communicated on between the homeowner and CSI?

Board Members will not be able to see the thread between homeowners and CSI.

How does the new system impact legality issues of how the board conducts business.

For instance, I have heard that email votes are valid only if unanimous. Appfolio's system tracks the vote. It has to be unanimous at this time.

I do not see anything that about reports such as balance sheets, income statements, vendors.

At this time, we will be emailing reporting to all boards. Managers will be reaching out to board members regarding reporting and how to make sure you have what you need. Appfolio will be rolling out soon the reporting side on the portal.

I see that we can approve invoices, but can we see invoices that we do not have to approve?

Yes, ALL invoices will now be in the packet

Homeowner input on a violation?

They will do this on the CSI website and we will log it.

Is there a limit on the number of photos per violation?

No there is not

Our compliance reports are currently 200+ pages. Will we be able to create filters on the compliance reports to only see open items?

This was a big reason for the move. The reporting is much simpler and we will be able to customize it all

Will board be able to see a history of the violations of a property?

Yes, there is a report for each violation.

How are property owners advised of out of compliance issues? is it us postal?

Email and USPS

When does this go live?

10/1 for board members, 10/4 for homeowners.

What about the Board Reports that we could go in VMS to review – budget – directory list?

We will be posting the Board reports on the portal just like we did in VMS

Can we subscribe to the calendar or add to my outlook?

Currently the calendar is only in the portal.

Can homeowner sign up for event on calendar.

Not at this time

Can external links like Google Drive or YouTube etc. be linked to a record ARC request or violation log?

Yes, CSI or a homeowner could include a link if needed.

Will compliance still be mailed in addition to the app and website?

Yes

Will the outstanding ARC request be moved over to the new system?

Yes

Are we not using Strongroom anymore for our invoices?

No we will be using the Appfolio service

Where are all the monthly budget reports?

From Tina Crockett : will the app log on be the same as the portal log on? Yes – your login you use on the desktop portal will be the same login you use on the app portal.

Will we be able to see our Monthly Budget reports?

Yes they will be posted and emailed

Will historical ledgers be moved over? Or just starting new on Oct launch?

Outstanding balances will be transferred over, but historical ledgers will not. CSI will have access to all history

With a tight deployment calendar, how do we get this info out to the community?

A mass email was already sent out to all community members and another email will be sent on Monday.

Will CSI be providing tech support or Appfolio?

CSI will provide support to Homeowners and Board Members, but CSI can loop in AppFolio if needed.