

# 3 WORKFLOW REQUIREMENTS FOR YOUR NEXT HOA MANAGEMENT SOFTWARE

**Switching HOA management software providers is no easy task.** It's critical to make the right choice the first time as this isn't something you'll want to repeat again in a couple years if you select the wrong tool. Conduct proper research, schedule demos, perform on-site visits, and ask the right questions to ensure you end up with a provider that meets all the needs of your business.

You likely already have a list of questions in mind that you plan to ask the provider involving specific features and processes. But what about those trickier situations that only become evident after you've started using the software? Here are 3 workflow requirements to validate when speaking with potential providers that will save your team time and your company money.

# 1 Stop wasting hours handling unique community processes.

Manage everything in one place. Even your most complex workflows. If your boards can dream it up, find a software solution that can handle it.

- Stuck tracking down the dizzying number of architectural request approvals from one community to another? Notify the right people with the right information, whether it's a minor mailbox repair or a major home remodel.
- Do some communities have unique billing processes, such as extra assessments for certain lots? Set the right rules per community once, and let software do the rest.
- Spending hours following different violation notification policies after a site visit? When violations get recorded, your software should inform the right people without you lifting a finger.

Don't settle for a system that manages 80% of your community's requirements. Choose the most flexible and complete platform in the industry.



## 2

## Don't just minimize financial errors. Eliminate them.

Find end-to-end financial automation that puts you a step ahead of your competitors.

- Homeowner payments post immediately to their account, eliminating concerns and preventing errors in delinquencies. A customer can complete a payment on the day the assessment is due, and everyone sees it instantly.
- Manage all inflows and outflows of cash, for all communities, in one platform, through tight integration with leading banks and accounts payable solutions.
- Don't become dependent on a third party to process payments and send the data file. Everything should happen in one platform and payments should generally post in seconds.




## 3

## Reduce risk and prevent inbox fatigue with one command center for homeowner communications.

Managing homeowner requests is the #1 concern for community managers, according to a recent study. You can't afford to compromise on communication tools when you are growing your business and asking your team to provide superior service to demanding clients.

- Generate letter templates and emails for any circumstance, for any recipient, in minutes.
- Reach homeowners faster by sending alerts and actions directly through a mobile app. Giving residents the information they need boosts satisfaction and elevates your brand.
- Eliminate steps by processing all assessments, violations, work orders, and architectural request communications from one spot.



Interested in learning more about what the right HOA accounting and community management software platform can do for your company?

**Schedule your free  
FRONTSTEPS Caliber  
demo today!**



# FRONTSTEPS

FRONTSTEPS provides the most complete, connected, and homeowner-friendly technology solution for association management. The FRONTSTEPS suite improves efficiency for property management teams, increases security for homeowner's associations, and delivers superior service for homeowners. The platform is trusted by more than 1,400 property management companies and 34,000 communities, representing 5,700,000 homeowners. Visit [frontsteps.com](https://frontsteps.com) for more information.

**GROW WITH FRONTSTEPS.**