appfolio PROPERTY MANAGER

Resident Portal

Resources for Homeowners
(2019-04)

FAQs Here are some "Frequently Asked Questions" prepared by Appfolio.

What type of bank account can I use to pay by eCheck? (eCheck and ACH are handled the same in Appfolio.) You can use a personal or business checking or savings account. Make sure to enter the routing and account number exactly as they appear on your checks and confirm the account has sufficient funds before payment is due; else a NSF and late fee may be changed.

Who can help me setting up my Resident Portal? The Appfolio Implementation Team is planning on a number of ways to assist you in setting up your Portal. Training at the Clubhouse where you can use a computer there or bring your laptop, tablet or phone, depending how you plan to access your Portal.

Once I have set up my Resident Portal, I can too set up payment reminders like 2 days ahead of the due date? Yes, and this reminder can be a text or email. Once your Resident Portal Profile is activated, you can determine how to get info. from the portal and/or Tamarack Office. You can add your email address here and a cell phone (as Appfolio can send you text messages or alerts IF you chose this route for communication).

What will an online payment look like on my bank statement? eCheck payments appear as "[association management company]". Credit or debit card payments plus the online portal convenience fee appear as "AF* [association management company]."

What type of credit or debit card can I use?

Credit or debit card payments can be made from a Visa, Mastercard, JCB, Diners Club or Discover branded card from any country. American Express, gift cards, or prepaid cards are not accepted.

When will I get trained to use portions of this software?

The Implementation team is setting up a schedule for overviews to present to Committees and the Board. Next, we plan training sessions and invite committee members and then residents, maybe first by those who currently use email; and then hands on for those without computer access.

Here are some questions we received since the first article on the Good Life on the Resident Portal.

Thank you for getting back to us about the upcoming way to have your assessment payments made and your interest in this new HOA software.

So, how is my payment information protected? (response by Appfolio)

We take privacy and security seriously and invest in state-of-the-art systems to protect payment information.

·A dedicated team monitors the security of our platform and infrastructure 24/7, 365 days a year.

·All sensitive data is encrypted both in transit and at rest.

·Bank-grade security. (You may be familiar with MFA, multifactor authorization such as needing to type in a code sent to you as a text or to your email.)

·Our security is regularly audited by third-party reviews.

·Security is baked into our software development lifecycle.

What other processes will Appfolio help Tamarack?

Receiving and Paying an Invoice— Once requested work is done by staff and you are to be billed through Appfolio and you'd get an invoice via email or text, depending how you set up your payments. Staff billing for such Invoicing, will include labor time and materials (and possibly the account number for accounting).

Communications— Emails or texts could be created to one or many, or all residents to facilitate communications. Documents and even photos can be sent in this manner. We're hoping we can test sending the Good Life via these new means.

What has the Implementation Team done since the software was approved? The Team meets weekly as a group and has been collecting data from the various sources that Tamarack now holds data. To date, the resident information* and chart of accounts as well as vendor information has been 'cleaned' and sent to Appfolio to populate our software. *The resident information includes the unit address, building, owner(s) name, email (if available), monthly assessment amount, and Phase. Already a brief overview has been given to the Maintenance Committee and their comments have been shared with the Team. The chart of accounts, too, has been reviewed by the Finance Committee. A roll-out plan is in draft form and updated as various benchmarks are being met.