



HOA Manager

User manual for HOA management companies

Version October 2026 · Online edition: <http://localhost:8001/manual>

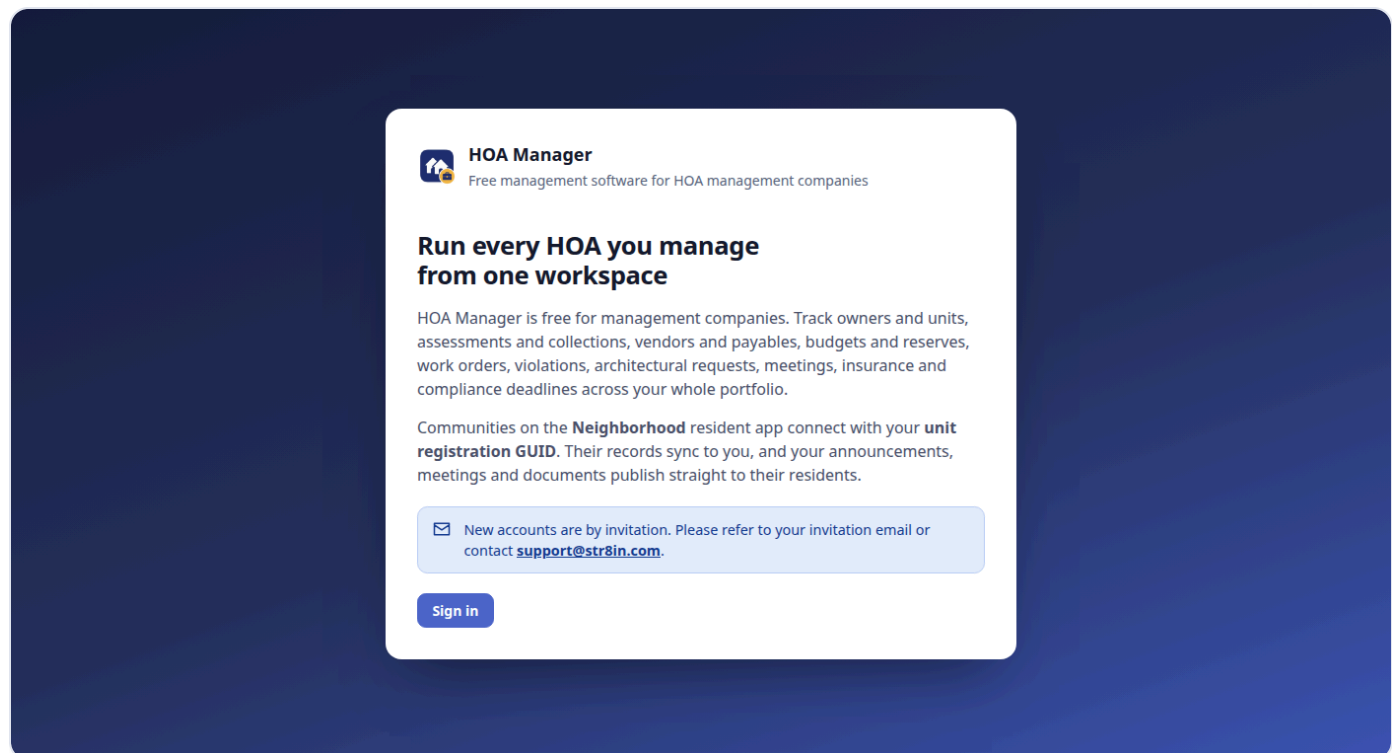
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1. **Getting started** — What HOA Manager is, how to sign in safely, finding your way around, roles, and the dashboard.
2. **Company setup** — Your company profile and registration GUID, security and AI policies, staff and roles, email sending, and the activity log.
3. **Associations** — Adding and maintaining the HOAs, condo and townhome associations you manage, and reading an association's overview page.
4. **Connecting the Neighborhood app** — Linking each HOA's Neighborhood resident app to your company, what syncs in each direction, and keeping connections healthy.
5. **Community records** — Keep each association's units, owners and board of directors up to date, by hand, by CSV import or through the Neighborhood app.
6. **Operations** — Run day-to-day community operations — work orders, covenant violations, architectural review requests and board meetings — and keep the HOA's Neighborhood app in step.
7. **Financials** — Fund accounting for every association — bank accounts and the chart of accounts, budgets, assessment billing, late fees, owner receivables, collections, payables and board-ready reports.
8. **Records** — Keep vendors, contracts, insurance, reserve studies, resale certificates and documents current for every association.
9. **Governance** — Store each association's bylaws, CC&Rs, articles and rules with full version history, and run amendments from draft through votes, recording and adoption.
10. **Communication and deadlines** — Post announcements to your HOAs' Neighborhood portals and keep every filing, renewal and meeting on the compliance calendar.
11. **AI assistants** — Connect Claude, ChatGPT, Copilot or another AI assistant to HOA Manager so it can look things up and help with routine updates, safely and as you.
12. **Platform administration** — For the operator who runs this HOA Manager installation; covers platform admins, inviting and suspending management companies, controlling registration, demo data and rebuilding this manual.
13. **Troubleshooting and FAQ** — Answers to common problems with signing in, HOA connections, email, billing and access, plus a glossary of HOA and HOA Manager terms.

Getting started

HOA Manager is free software for **community association management companies**. One workspace holds every association your company manages: HOAs, condominium associations, townhome communities and master associations. From it you run owner records, maintenance, violations, architectural review, meetings, assessments and collections, vendor payables, budgets, reserves, insurance, governing documents and compliance deadlines.

Many communities also use the **Neighborhood app**, the resident portal where owners pay dues, submit maintenance requests and read announcements. When an HOA's Neighborhood app is connected to your company, its records flow into HOA Manager automatically, and your updates (announcements, meetings, documents, work-order progress) flow back to residents. Chapter 4, *Connecting the Neighborhood app*, explains how.

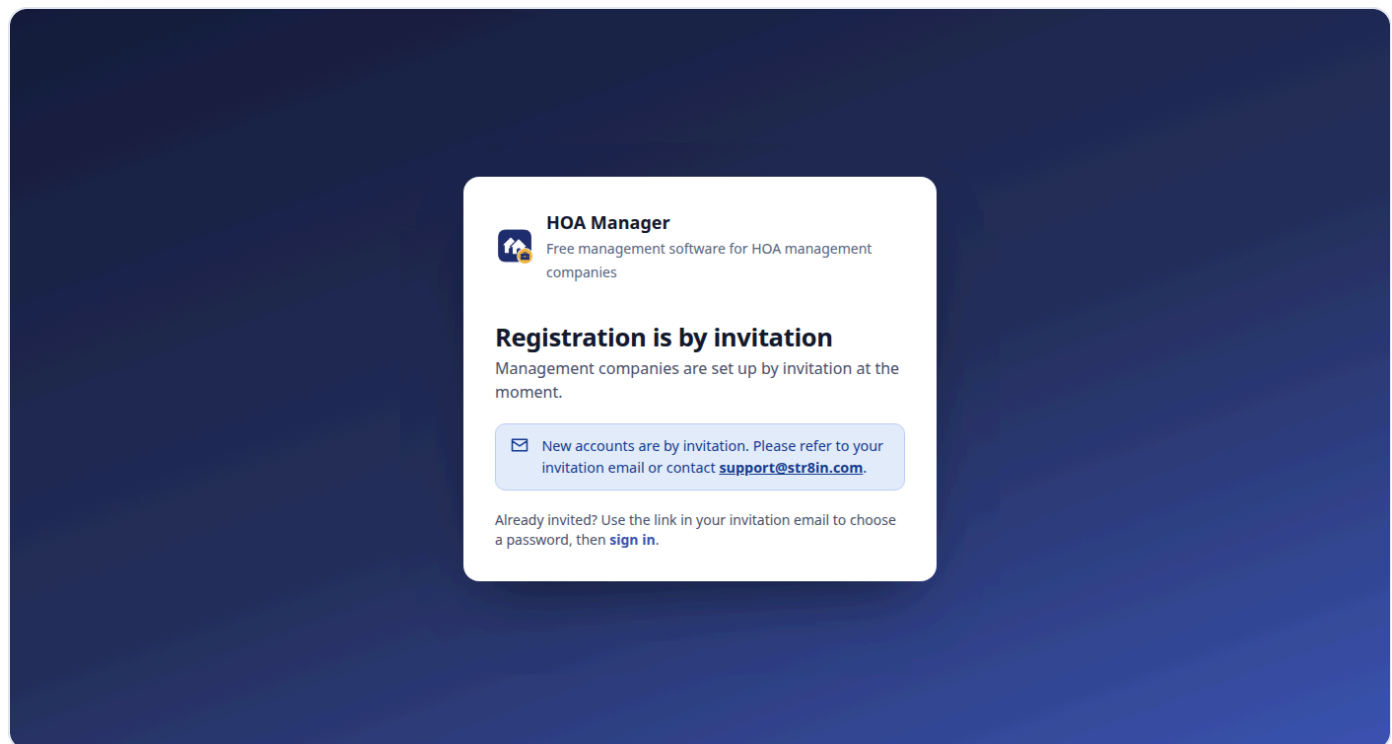


The public home page of HOA Manager

How to get an account

There are two ways in.

Situation	What to do
Your company is new to HOA Manager	Registration is by invitation. Use the link in your invitation email, or contact support (the address is shown on the sign-in and registration pages). When public registration is open, a Register your company, free button on the home page creates your company and makes you its owner.
Your company already uses HOA Manager	Ask your company's owner or an administrator to add you under Staff . You receive an invitation email titled <i>You're invited to ... on HOA Manager</i> .



When registration is by invitation, the sign-up page explains how to get access

Accept an invitation

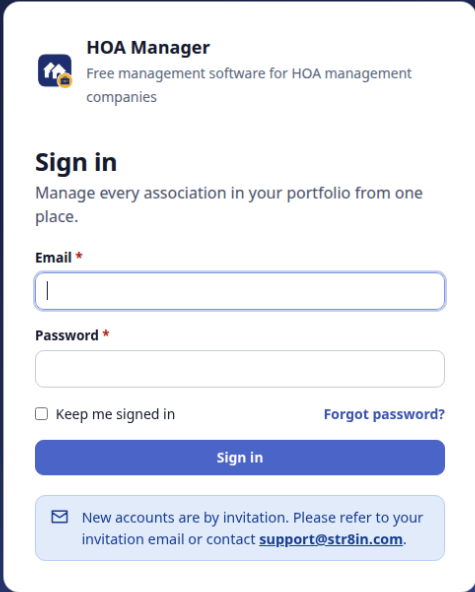
1. Open the invitation email and click **Accept invitation and set password**.
2. Your email address is filled in. Enter a new password (at least 10 characters, with letters and numbers) and confirm it.
3. Click **Save password**, then sign in with your email and new password.

Tip: Invitation links expire after a short time. If yours has expired, use **Forgot password?** on the sign-in page; it sends the same kind of link. Or ask your administrator to click **Resend**

invitation on the Staff page.

How to sign in

1. Go to your HOA Manager address and click **Sign in** (or open `/login`).
2. Enter your **Email** and **Password**.
3. Tick **Keep me signed in** only on a device that you alone use.
4. Click **Sign in**.



HOA Manager
Free management software for HOA management companies

Sign in
Manage every association in your portfolio from one place.

Email *

Password *

☐ Keep me signed in [Forgot password?](#)

Sign in

✉ New accounts are by invitation. Please refer to your invitation email or contact support@str8in.com.

The sign-in page

If you enter the wrong password several times in a row, sign-in pauses briefly. Wait a minute and try again.

Reset a forgotten password

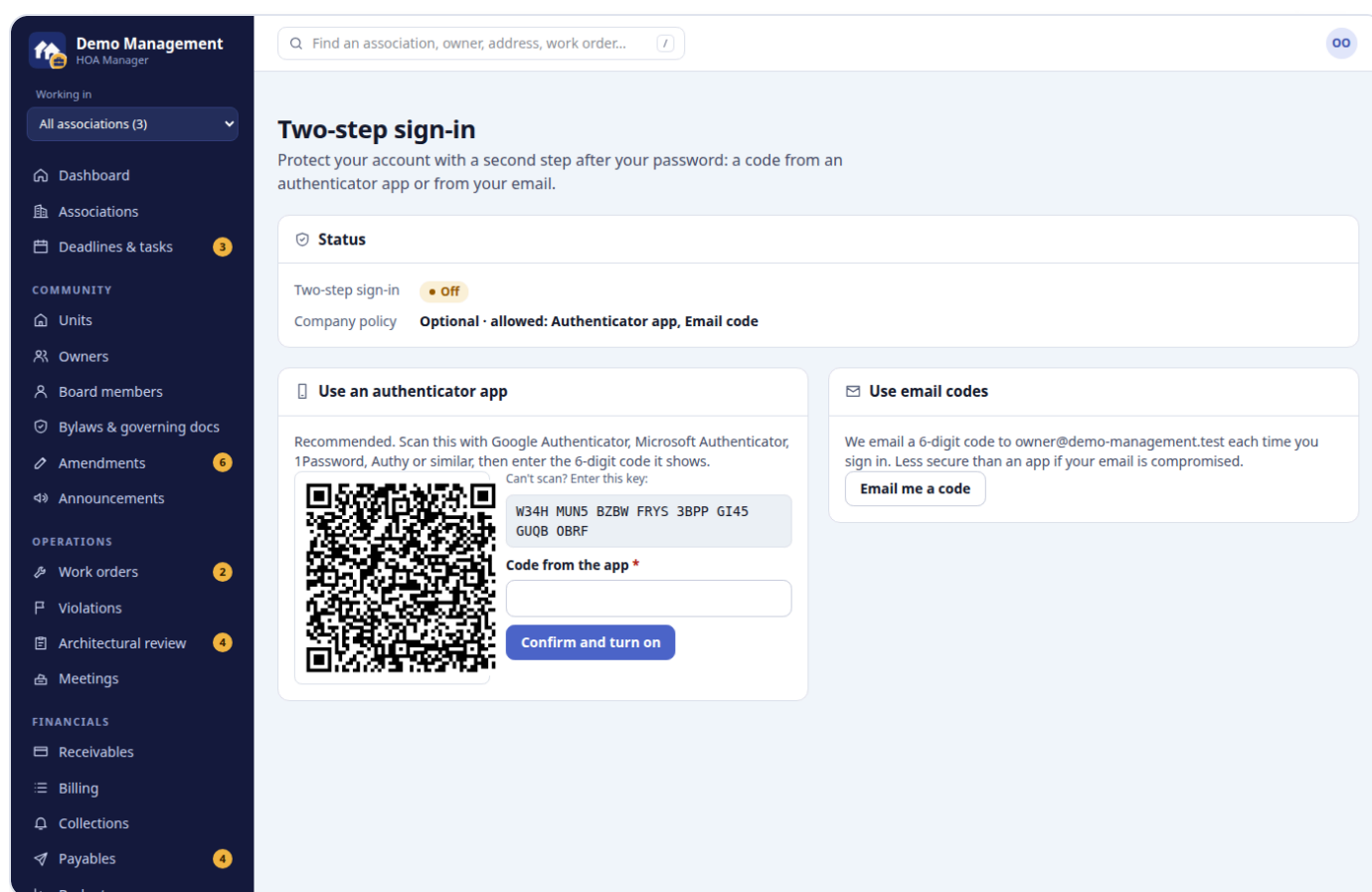
1. On the sign-in page, click **Forgot password?**
2. Enter your email and click **Email reset link**.
3. Open the email, click the link, choose a new password and click **Save password**.

For privacy, the page says a link is on its way whether or not that address has an account.

How to set up two-step sign-in

Two-step sign-in (also called MFA) asks for a short code after your password, so a stolen password alone can't open your account. Your company decides whether it is **optional** or **required** for your role. If it's required, HOA Manager takes you to the setup page the first time you sign in and won't let you continue until it's done.

Open it any time from the account menu (your initials, top right) → **Two-step sign-in**.



The two-step sign-in page, with a QR code for an authenticator app and the email option

The **Status** card shows whether two-step sign-in is on, which method you use, your company's policy and how many recovery codes you have left.

Use an authenticator app (recommended)

1. Install an authenticator app on your phone, such as Google Authenticator, Microsoft Authenticator, 1Password or Authy.
2. Under **Use an authenticator app**, scan the QR code with the app. If you can't scan, type the key shown under *Can't scan? Enter this key*.
3. Type the 6-digit code the app shows into **Code from the app** and click **Confirm and turn on**.

Use email codes

1. Under **Use email codes**, click **Email me a code**.
2. Enter the 6-digit code from the email in **Code from the email** and click **Confirm and turn on**.

Email codes expire after 10 minutes and work once.

Save your recovery codes

As soon as two-step sign-in is on, HOA Manager shows **8 recovery codes**, once. Each code works one time if you lose your phone or can't get to your email. Click **Copy all** or **Print** and keep them somewhere safe, such as a password manager.

Important: The codes are not shown again. If you lose them, go to **Recovery codes**, confirm your password and click **Make new recovery codes**. The old codes stop working.

Signing in with two-step sign-in

After your password, the **Two-step verification** page asks for your code:

- **Authenticator app:** type the current code from the app.
- **Email codes:** HOA Manager emails a code as soon as you sign in. Use **Send a new code** if it doesn't arrive.
- **Lost your device?** Enter one of your recovery codes instead.

Tick **Don't ask again on this device for N days** to skip the code on that computer. Your company sets how many days, or turns this option off. After five wrong codes you must wait five minutes.

If you have no device and no recovery codes left, ask your company administrator to **Reset two-step** for you (see chapter 2).

Finding your way around

The screenshot displays the 'Portfolio dashboard' for 'Demo Management HOA Manager'. The interface includes a sidebar on the left with categories like COMMUNITY, OPERATIONS, FINANCIALS, and RECORDS. The main content area features a top search bar, a 'Portfolio dashboard' title, and a summary of key metrics: 3 Associations, 88 Units, \$11,135 in Owner balances due, 7 Open work orders, 5 Open violations, and 6 ARC requests pending. Below these are sections for 'Coming due (next 60 days)' and 'Upcoming meetings', each with a list of tasks and dates. A 'Quick actions' section at the bottom right offers buttons for 'New work order' and 'Record a payment'.

The dashboard for the whole portfolio

The sidebar on the left groups everything you can open:

Group	Contains
(top)	Dashboard, Associations, Deadlines & tasks
Community	Units, Owners, Board members, Bylaws & governing docs, Amendments, Announcements
Operations	Work orders, Violations, Architectural review, Meetings
Financials	Receivables, Billing, Collections, Payables, Budgets, Banking & GL, Reports
Records	Vendors, Contracts, Insurance, Reserve studies, Resale & estoppel, Documents

Group	Contains
Company	Neighborhood links, Staff, Company settings, Email sending, Activity log

Yellow numbers next to an item show what needs attention, for example new work orders or invoices waiting for approval. Items you don't have permission to use are hidden.

Work in one association at a time

The **Working in** menu at the top of the sidebar sets which association you're looking at.

- **All associations** shows your whole portfolio in every list and on the dashboard.
- **Pick one association** and every list, report and form defaults to it until you change it again.

Demo Management
HOA Manager

Working in
Oak Ridge HOA

Dashboard

- Associations
- Deadlines & tasks **3**

COMMUNITY

- Units
- Owners
- Board members
- Bylaws & governing docs
- Amendments **5**
- Announcements

OPERATIONS

- Work orders **2**
- Violations
- Architectural review **4**
- Meetings

FINANCIALS

- Receivables
- Billing
- Collections
- Payables **4**
- Budgets
- Banking & GL
- Reports

Find an association, owner, address, work order... **7**

Oak Ridge HOA

Showing this association only. Pick "All associations" in the sidebar for the full portfolio.

1 neighborhood instance asked to connect: Maple Grove HOA. [Review requests](#)

Units 48	Owner balances due \$3,280 9 units with a balance	Open work orders 4 1 new, not yet assigned	Open violations 2	ARC requests pending 3	Invoices to approve 2 \$4,840.00
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Coming due (next 60 days) [View all](#)

- OCT 9** Fidelity / crime bond policy expires
Insurance · Oak Ridge HOA · 15 days overdue **Overdue**
- OCT 21** Walk-through inspection for violations
Task · Oak Ridge HOA · 3 days overdue **Overdue**
- OCT 21** ARC ARC-00005 decision due
ARC · Oak Ridge HOA · 3 days overdue **Overdue**
- NOV 1** Prepare and adopt next year's budget
Task · Oak Ridge HOA · in 8 days
- NOV 11** Renew pool operating permit with county
Task · Oak Ridge HOA · in 18 days
- NOV 11** ARC ARC-00003 decision due
ARC · Oak Ridge HOA · in 18 days
- NOV 16** Monthly financial package to the board
Task · Oak Ridge HOA · in 23 days
- NOV 18** Pool service & chemicals (BlueWave Pool Service) ends
Contract · Oak Ridge HOA · in 25 days
- NOV** ARC ARC-00006 decision due

Upcoming meetings [View all](#)

- NOV 2** Fall social committee planning
Oak Ridge HOA · 7:00 PM · Clubhouse
- NOV 5** November board meeting
Oak Ridge HOA · 6:30 PM · Clubhouse
- NOV 19** Budget workshop for 2027
Oak Ridge HOA · 6:00 PM · Clubhouse
- DEC 24** Annual owners meeting and election
Oak Ridge HOA · 7:00 PM · Community center

Quick actions

- [New work order](#)
- [Record a payment](#)
- [Enter a vendor invoice](#)
- [Send an announcement](#)
- [Schedule a meeting](#)

The dashboard while working in Oak Ridge HOA

Tip: Most list pages also have their own association filter, which overrides the sidebar choice for that page.

Search

The search box at the top of every page finds associations, units (by address, unit or lot number, or tenant), owners (by name, email or phone), work orders and violations (by number or title) and vendors. Press **/** on your keyboard to jump to it.

The screenshot shows the 'Demo Management HOA Manager' interface. On the left is a dark sidebar with a navigation menu. The main content area has a search bar at the top with the text 'oak' and a magnifying glass icon. Below the search bar, the title 'Search' is followed by 'Results for "oak"'. There are two sections: 'Associations' and 'Units'. The 'Associations' section lists 'Oak Ridge HOA' with the subtitle 'Homeowners Association'. The 'Units' section lists seven units, all associated with 'Oak Ridge HOA': '124 Oak Ln', '148 Oak Ln', '172 Oak Ln', '196 Oak Ln', '220 Oak Ln', '244 Oak Ln', and '268 Oak Ln'. The sidebar menu includes categories like 'Working in', 'COMMUNITY', 'OPERATIONS', and 'FINANCIALS' with various sub-items and notification counts.

Associations
Oak Ridge HOA Homeowners Association

Units
124 Oak Ln Oak Ridge HOA
148 Oak Ln Oak Ridge HOA
172 Oak Ln Oak Ridge HOA
196 Oak Ln Oak Ridge HOA
220 Oak Ln Oak Ridge HOA
244 Oak Ln Oak Ridge HOA
268 Oak Ln Oak Ridge HOA
292 Oak Ln Oak Ridge HOA

Search results for "oak"

The account menu

Click your initials in the top-right corner for:

- **My profile:** your name, email, phone, job title and password.
- **Two-step sign-in:** described above.
- **AI assistants:** connect an AI assistant to HOA Manager (chapter 11).
- **Sign out.**

Roles: who can do what

Every staff member has one role. Owners, administrators and accountants see **every** association. Community managers, staff and read-only users see **only the associations assigned to them**.

Role	Sees	Can do
Owner	All associations	Everything, including company settings, staff, email settings and creating other owners
Administrator	All associations	Everything except creating or promoting owners
Community Manager	Assigned associations	Run records, work orders, violations, meetings, Neighborhood links; approve invoices
Accountant	All associations	Financials for every association: billing, receivables, collections, payables, budgets, reports
Staff	Assigned associations	Day-to-day records; no financial posting
Read-only	Assigned associations	View only; cannot change anything

 Demo Management
HOA Manager

Working in

All associations (2) ▾

Dashboard

Associations

Deadlines & tasks 2

COMMUNITY

Units

Owners

Board members

Bylaws & governing docs

Amendments 3

Announcements

OPERATIONS

Work orders 1

Violations

Architectural review 2

Find an association, owner, address, work order... 7

MM

Associations

Every community in your portfolio, with its connection status and headline numbers.

+ Add association

Search by name

Any status ▾

Filter

ASSOCIATION	STATUS	NEIGHBORHOOD APP	UNITS	OPEN WORK ORDERS	OWNER BALANCE DUE	MANAGER
Cedar Point Townhomes Townhome Association · Perry, GA	Onboarding	Not connected	16	0	\$0.00	Marcus Manager
Oak Ridge HOA Homeowners Association · Macon, GA	Active	Connected	48	4	\$3,280.00	Marcus Manager

A community manager sees only the associations assigned to them

To assign associations to someone, see *How to add a staff member* in chapter 2, or use **Management team** on the association's page (chapter 3).

The dashboard

The dashboard is your morning check-in. It covers the whole portfolio, or one association if you've chosen one in **Working in**.

Headline numbers. Each card opens the matching list:

- **Associations**, and how many are connected to the Neighborhood app (portfolio view only).
- **Units**.
- **Owner balances due**, and how many units have a balance.
- **Open work orders**, including how many are new and not yet assigned.
- **Open violations**.
- **ARC requests pending**.
- **Invoices to approve**, with their total.

Coming due (next 60 days) combines deadlines from across the system: compliance tasks, insurance renewals, contract renewals, architectural review decisions and vendor insurance certificates. Overdue items are marked **Overdue**.

Work orders needing attention lists open jobs, most urgent first, and flags those that came from the HOA portal.

Upcoming meetings shows the next board, budget and annual meetings.

Quick actions are shortcuts to everyday tasks: *New work order*, *Record a payment*, *Enter a vendor invoice*, *Send an announcement*, *Schedule a meeting* and *Log an estoppel request*.

When a Neighborhood app asks to connect to your company, a blue banner at the top of the dashboard says so, with a **Review requests** link.

Getting started checklist

A new company's first screen (also at `/welcome`) walks you through four steps:

1. **Add your associations.** Each gets a standard HOA chart of accounts and a compliance calendar (chapter 3).
2. **Connect Neighborhood apps.** Share your unit registration GUID, or create invite codes (chapter 4).
3. **Invite your team.** Add community managers, accountants and staff (chapter 2).
4. **Complete your company profile.** Your address, license number and contact details appear on statements and estoppel certificates (chapter 2).

Company setup

This chapter covers the settings that apply to your whole management company. Most of them are available only to the company **Owner** and **Administrators**. They appear in the sidebar under **Company: Staff, Company settings, Email sending** and **Activity log**.

How to complete your company profile

1. In the sidebar, click **Company settings**.
2. In **Company profile**, fill in the **Company name**, **Legal name**, **Email**, **Phone**, **Website**, **Management license #** (your state CAM or management company license, if required), address and **Time zone**.
3. Click **Save settings** at the bottom of the page.

Your company name, contact details and license number appear on owner statements, estoppel certificates and email sent on your behalf.

**Demo Management**
HOA Manager

Working in

All associations (3) ▾

Dashboard

Associations

Deadlines & tasks 3

COMMUNITY

Units

Owners

Board members

Bylaws & governing docs

Amendments 6

Announcements

OPERATIONS

Work orders 2

Violations

Architectural review 4

Meetings

FINANCIALS

Receivables

Billing

Collections

Payables 4

Budgets

Banking & GL

Reports

RECORDS

Vendors

Contracts

Insurance

Reserve studies

Resale & estoppel

Documents

COMPANY

Neighborhood links 1

Staff

Company settings

Email sending

Activity log

Find an association, owner, address, work order... 7

oo

Company settings

Your company profile, unit registration GUID and how neighborhood connection requests are handled.

Unit registration GUID

HOAs running the Neighborhood app use this GUID, with this server's address, to ask to connect to Demo Management. It only lets them *request* a connection; each request still needs approval unless auto-approve is on.

12d55a35-d05d-4675-9a69-0746d242732e Copy Issue a new GUID

Server address:

Company profile

Company name *	Legal name	Email *	Phone
Demo Management	Demo Management Group, LLC	office@demo-management.test	(478) 555-0100
Website	Management license #	Address	Address line 2
https://demo-management.test	CAM-GA-004512 State CAM or management company license, if required.	400 Cherry St, Suite 210	
City	State	ZIP	Time zone *
Macon	GA	31201	America/New York

Neighborhood connection requests

☐ Approve requests automatically and create a new association for each
Leave this off if you want to check each HOA before it connects. Invite codes are always approved automatically.

Security: two-step sign-in (MFA)

Applies to everyone who signs in to Demo Management. Staff set up their own second step under [Two-step sign-in](#); anyone covered by a requirement is asked to set it up at their next page load.

Policy *

Remember a verified device for (days) *

0 asks for a code at every sign-in.

Allowed methods

☒ Authenticator app ☒ Email code

When required, require it for

☐ Owner ☐ Administrator ☐ Community Manager ☐ Accountant ☐ Staff ☐ Read-only

Leave all unticked to require it for everyone.

AI assistants (MCP)

Staff can connect AI assistants to HOA Manager with personal tokens from [AI assistants](#). Assistants act as the person: same associations, same role.

Allow AI assistants *

Active AI access tokens (0)

No one has connected an AI assistant

Save settings

Company settings: registration GUID, profile, security and AI policies

Your unit registration GUID

At the top of **Company settings**, the **Unit registration GUID** card shows a long code such as `12d55a35-d05d-4675-9a69-0746d242732e`, together with this server's address. HOAs running the Neighborhood app use the GUID and address to **ask** to connect to your company. A request still needs your approval unless you turn on auto-approval (below).

- Click **Copy** to copy the GUID.
- Share it, with the server address, with each HOA's administrator. Chapter 4 explains what they do with it.

Issue a new GUID

If the GUID has been shared more widely than you'd like, click **Issue a new GUID** and confirm.

- HOAs that are already connected keep working.
- Anyone who hasn't connected yet will need the new GUID.
- The card shows when it was last rotated.

How to handle connection requests automatically

In **Neighborhood connection requests**, tick **Approve requests automatically and create a new association for each** and click **Save settings**.

Leave it off if you want to check each HOA before it connects. **Invite codes** (chapter 4) are always approved automatically, whatever this setting says.

How to set your two-step sign-in policy

The **Security: two-step sign-in (MFA)** card controls two-step sign-in for everyone in your company.

1. Choose a **Policy**:
 - **Off: no second factor**
 - **Optional: each person can turn it on**
 - **Required**

2. Set **Remember a verified device for (days)**. Use 0 to ask for a code at every sign-in. The maximum is 90.
3. Under **Allowed methods**, tick **Authenticator app**, **Email code** or both.
4. If the policy is **Required**, tick the roles it applies to under **When required, require it for**. Leave all of them unticked to require it for everyone.
5. Click **Save settings**.

People covered by a new requirement are taken to the setup page the next time they open any page. If you stop allowing a method someone uses, they're asked to set up an allowed one.

Tip: Requiring two-step sign-in for owners, administrators and accountants protects the accounts that can see every association's finances.

How to control AI assistants

The **AI assistants (MCP)** card sets whether staff may connect AI assistants such as Claude or ChatGPT to HOA Manager:

Setting	Effect
Off: AI assistants cannot connect	No tokens can be created, and existing tokens stop working immediately
Read only: assistants can look things up	Assistants can read data but never change it
Read and update	Assistants can also open work orders, add notes and manage tasks, if the person's role allows it

Below the settings form, **Active AI access tokens** lists every active token in your company: who created it, its name, its access, when it was last used and when it expires. Click **Revoke** to disconnect any token at once. Chapter 11 explains AI assistants in full.

How to add a staff member

1. In the sidebar, click **Staff**, then **Add staff**.

2. Under **Account**, enter **Name**, **Email**, **Phone** (optional) and **Job title** (optional).
3. Choose a **Role**. Only owners can create other owners.
4. Under **Associations**, tick the associations this person manages.
5. Click **Add and send invite**.

The screenshot shows the 'Add staff' form in the Demo Management HOA Manager interface. The left sidebar contains navigation links for various sections: Dashboard, Associations, Deadlines & tasks, COMMUNITY (Units, Owners, Board members, Bylaws & governing docs, Amendments, Announcements), OPERATIONS (Work orders, Violations, Architectural review, Meetings), FINANCIALS (Receivables, Billing, Collections, Payables, Budgets), and Banking & GL. The main content area is titled 'Staff / New' and 'Add staff'. It features a search bar at the top with the text 'Find an association, owner, address, work order...'. Below this, the 'Account' section has input fields for Name, Email, Phone, and Job title, with a note 'They get an email to set their password.' and a Role dropdown menu set to 'Community Manager'. The 'Associations' section includes a note 'Managers, staff and read-only users only see the associations ticked here. Owners, administrators and accountants see all of them.' and three checkboxes for Cedar Point Townhomes, Oak Ridge HOA, and Willow Creek Condominiums. At the bottom right, there are 'Cancel' and 'Add and send invite' buttons.

Adding a staff member: account details, role and associations

The new person receives an invitation email with a link to choose their password.

Important: Managers, staff and read-only users see only the associations ticked here. Owners, administrators and accountants always see every association, so ticking associations for them has no effect.

What each role can do

The **Staff** page has a **What each role can do** summary. In short:

- **Owner / Administrator:** everything, including company settings, staff and every association.

- **Community Manager:** runs their assigned associations, including neighborhood links and invoice approval.
- **Accountant:** financials for every association.
- **Staff:** day-to-day records for assigned associations; no financial posting.
- **Read-only:** can view assigned associations but not change anything.

Managing your team

The screenshot shows the 'Demo Management' HOA Manager interface. On the left is a dark sidebar with navigation links: Dashboard, Associations, Deadlines & tasks (3), COMMUNITY (Units, Owners, Board members, Bylaws & governing docs, Amendments (6), Announcements), OPERATIONS (Work orders (2), Violations, Architectural review (4), Meetings), FINANCIALS (Receivables, Billing, Collections, Payables (4), Budgets, Banking & GL). The main content area has a search bar at the top: 'Find an association, owner, address, work order...' with a magnifying glass icon and a '1' in a box. Below the search bar is the 'Staff' section with a subtitle 'Who can sign in, what they can do, and which associations they manage.' and a '+ Add staff' button. The staff list is a table with columns: NAME, ROLE, ASSOCIATIONS, TWO-STEP, LAST SIGN-IN, STATUS, and actions (Resend invitation, Deactivate). The table lists seven staff members: Alex Accountant, Andre Admin, Marcus Manager, Olivia Owner, Priya Patel, Sofia Staff, and Victor Viewer. Below the table is a section titled 'What each role can do' with two entries: Owner / Administrator (Everything, including company settings, staff, and every association.) and Community Manager (Runs their assigned associations: records, work orders, violations, meetings, neighborhood links, invoice approval.).

NAME	ROLE	ASSOCIATIONS	TWO-STEP	LAST SIGN-IN	STATUS	
Alex Accountant accountant@demo-management.test · Controller	Accountant	All	Off	1 week ago	Active	Resend invitation Deactivate
Andre Admin admin@demo-management.test · Operations Director	Administrator	All	Off	6 days ago	Active	Resend invitation Deactivate
Marcus Manager manager@demo-management.test · Senior Community Manager	Community Manager	Oak Ridge HOA, Cedar Point Townhomes	Off	3 seconds ago	Active	Resend invitation Deactivate
Olivia Owner owner@demo-management.test · Principal	Owner	All	Off	9 seconds ago	Active	
Priya Patel priya@demo-management.test · Community Manager	Community Manager	Willow Creek Condominiums	Off	11 hours ago	Active	Resend invitation Deactivate
Sofia Staff staff@demo-management.test · Assistant Community Manager	Staff	Oak Ridge HOA	Off	6 days ago	Active	Resend invitation Deactivate
Victor Viewer viewer@demo-management.test · Board liaison (read-only)	Read-only	Willow Creek Condominiums	Off	11 hours ago	Active	Resend invitation Deactivate

What each role can do

Owner / Administrator	Everything, including company settings, staff, and every association.
Community Manager	Runs their assigned associations: records, work orders, violations, meetings, neighborhood links, invoice approval.

The staff list, with each person's role, associations, two-step status and last sign-in

The **Staff** list shows each person's **Role**, the **Associations** they manage ("All" for portfolio-wide roles), whether **Two-step** sign-in is on, their **Last sign-in** and their **Status**.

Change someone's role or associations

Click the person's name, make your changes and click **Save**. Untick **Can sign in** to block access without deleting the account. You can't change your own role or deactivate yourself, and the

company must always keep at least one owner.

Resend an invitation

Click **Resend invitation** next to the person. Use this if their invitation expired or went to spam.

Reset two-step sign-in for someone who lost their phone

Click **Reset two-step**. Their second step is cleared and every device they asked to be remembered is forgotten. If your company requires two-step sign-in, they're asked to set it up again at their next sign-in.

Deactivate someone who has left

Click **Deactivate** and confirm. They can no longer sign in, but their history (notes, approvals, activity) stays attributed to them. To restore access later, open their record and tick **Can sign in**.

How to choose how email is sent

Email sending controls how email from your company reaches owners, vendors and title companies. That includes owner statements, estoppel certificates and work orders sent to vendors.

Working in

All associations (3)

Dashboard

Associations

Deadlines & tasks

COMMUNITY

Units

Owners

Board members

Bylaws & governing docs

Amendments

Announcements

OPERATIONS

Work orders

Violations

Architectural review

Meetings

FINANCIALS

Receivables

Billing

Collections

Payables

Budgets

Banking & GL

Reports

RECORDS

Vendors

Contracts

Insurance

Find an association, owner, address, work order...

oo

Email sending

Choose how email from Demo Management reaches owners, vendors and title companies: statements, estoppel certificates and work orders.

Right now

Mail is sent From hello@example.com as "Demo Management", replies to office@demo-management.test

Send a test to owner@demo-management.test

Sending method

Send from HOA Manager

Simplest and most reliable. Mail comes from hello@example.com with your company name, and replies go to you.

Send from my email address

Mail shows your own address (for example office@yourdomain.com). You confirm the address by email; for best delivery, authorize HOA Manager in your domain's DNS.

Send through my own mail server (SMTP)

Mail goes through your own provider (Microsoft 365, Google Workspace, your host). It appears in your Sent folder and follows your domain's security settings.

Sender details

Sender name

Demo Management

Defaults to Demo Management.

Replies go to

office@demo-management.test

Defaults to office@demo-management.test.

What uses these settings

Owner account statements, estoppel certificates and work orders sent to vendors use your chosen sender.

Sign-in codes, password links and staff invitations always come from HOA Manager (with your company name), so nobody gets locked out if your mail server has a problem.

Announcements to residents are emailed by each HOA's Neighborhood app.

Save

The Email sending page

The **Right now** card always shows how mail is actually going out at the moment, and any recent problem.

Choose a **Sending method**:

Method	How it looks to recipients	What it needs
Send from HOA Manager	From HOA Manager's address with your company name; replies come to you	Nothing; this is the default
Send from my email address	From your own address, for example office@yourdomain.com	You confirm the address by clicking an emailed link; DNS changes recommended

Method	How it looks to recipients	What it needs
Send through my own mail server (SMTP)	From your address, through your provider (Microsoft 365, Google Workspace, your host); appears in your Sent folder	Server details and a successful test

In **Sender details**, set the **Sender name** (defaults to your company name) and **Replies go to** (defaults to your company email) for any method.

Send from your own email address

1. Choose **Send from my email address**.
2. Enter the **From address** and click **Save**.
3. HOA Manager emails a confirmation link to that address. Open the email and click **Confirm address**. The link works for 3 days.
4. Until you confirm, mail keeps going out from HOA Manager. Use **Send the link again** if needed.

Important: Many providers junk or reject mail that uses your domain unless the domain allows HOA Manager to send for it. The **Improve delivery from your address** card shows the SPF entry to add to your domain's DNS. If you can't change DNS, use your own mail server instead.

Send through your own mail server (SMTP)

1. Choose **Send through my own mail server (SMTP)**.
2. Enter the **From address**, then under **Your mail server (SMTP)** fill in **Server** (for example smtp.office365.com), **Port**, **Security** (usually STARTTLS on port 587), **Username** and **Password**. Use an app password if your provider offers one.
3. Click **Save**. HOA Manager sends a test message to you, and your server is used only after the test succeeds.

If the test fails, the error appears at the top of the page and mail keeps going out through HOA Manager. Fix the details and save again, or click **Send a test to ...**. Leave **Password** blank when saving to keep the stored one.

If your server stops working later, messages are sent through HOA Manager instead so nothing is lost, and the problem appears under **Last problem**.

Tip: Sign-in codes, password links and staff invitations always come from HOA Manager (with your company name), so a broken mail server never locks anyone out. Announcements to residents are emailed by each HOA's Neighborhood app.

The activity log

Activity log (sidebar, under **Company**) records who did what and when: sign-ins, records created and changed, status changes, invoices approved, links approved or disconnected, settings changed, AI assistant actions and more.

Demo Management
HOA Manager

Working in
All associations (3)

Dashboard
Associations
Deadlines & tasks (3)

COMMUNITY
Units
Owners
Board members
Bylaws & governing docs
Amendments (6)
Announcements

OPERATIONS
Work orders (2)
Violations
Architectural review (4)
Meetings

FINANCIALS
Receivables
Billing
Collections
Payables (4)
Budgets

Find an association, owner, address, work order... (7)

Activity log

Who did what, and when. Kept for audit.

Search descriptions Filter

WHEN	WHO	WHAT	ASSOCIATION
Oct 24, 2026 2:30 PM	Marcus Manager	Marcus Manager signed in auth.login	—
Oct 24, 2026 2:30 PM	Olivia Owner	Olivia Owner signed in auth.login	—
Oct 24, 2026 2:29 PM	Marcus Manager	Marcus Manager signed in auth.login	—
Oct 24, 2026 2:29 PM	Olivia Owner	Olivia Owner signed in auth.login	—
Oct 24, 2026 2:18 PM	Olivia Owner	Olivia Owner signed in auth.login	—
Oct 24, 2026 3:21 AM	Victor Viewer	Victor Viewer signed in auth.login	—
Oct 24, 2026 3:21 AM	Priya Patel	Priya Patel signed in auth.login	—
Oct 24, 2026 3:20 AM	Olivia Owner	Olivia Owner signed in auth.login	—
Oct 24, 2026 3:20 AM	Olivia Owner	AMD-00008: Board vote 3 for, 0 against, 0 abstaining: approved amendment.approved	Willow Creek Condominiums
Oct 24, 2026 3:20 AM	Olivia Owner	AMD-00008: Sent to the board for review amendment.board_review	Willow Creek Condominiums

The activity log

- Use the search box to find entries by description, then click **Filter**.
- Choose an association in **Working in** to see only that association's activity.

- Entries made through an AI assistant end with (*via AI assistant*).

Managers, staff and read-only users see only the activity for their own associations, plus company-wide entries.

Associations

An **association** is one community your company manages: a homeowners association, condominium association, townhome association, cooperative, master association or commercial association. Almost everything in HOA Manager belongs to an association, including units, owners, work orders, ledgers, budgets, meetings and governing documents.

The association list

Click **Associations** in the sidebar to see every association you can access.

Associations

Every community in your portfolio, with its connection status and headline numbers.

[+ Add association](#)

Search by name: Any status:

ASSOCIATION	STATUS	NEIGHBORHOOD APP	UNITS	OPEN WORK ORDERS	OWNER BALANCE DUE	MANAGER
Cedar Point Townhomes Townhome Association · Perry, GA	• Onboarding	Not connected	16	0	\$0.00	Marcus Manager
Oak Ridge HOA Homeowners Association · Macon, GA	• Active	• Connected	48	4	\$3,280.00	Marcus Manager
Willow Creek Condominiums Condominium Association · Warner Robins, GA	• Active	Not connected	24	3	\$7,855.00	Priya Patel

The association list for the example company

Each row shows:

- **Association:** the name, type and city.
- **Status:** *Onboarding*, *Active*, *Inactive* or *Terminated*.
- **Neighborhood app:** whether the HOA's resident app is connected, waiting or not connected.
- **Units**, **Open work orders** and **Owner balance due**.
- **Manager:** the primary community manager.

Use the search box to find an association by name, or filter by **status**. Click a name to open its page.

Tip: Community managers, staff and read-only users only see associations assigned to them. If one is missing, ask an administrator to add you to its management team.

How to add an association

You need the Owner, Administrator or Community Manager role.

1. Click **Associations**, then **Add association**.
2. Fill in each section of the form (described below).
3. Click **Add association**.

The Add association form

Field	What to enter
Name	The everyday name, e.g. <i>Oak Ridge HOA</i> (required)
Legal name	The incorporated name, e.g. <i>Oak Ridge Homeowners Association, Inc.</i>

Field	What to enter
Type	Homeowners, Condominium, Townhome, Cooperative, Master or Commercial association
Status	Start with Onboarding while you collect records; change to Active when you take over
Street address, City, State, ZIP	The community's address
Website / portal URL	The HOA's public site or Neighborhood app address
EIN, State of incorporation, Incorporated on	From the articles of incorporation and IRS letter

Assessments & fiscal year

Field	What it controls
Fiscal year starts	The first month of the budget year; used by budgets, reports and the compliance calendar
Assessment frequency	Monthly, Quarterly, Semi-annual or Annual
Default assessment per unit (\$)	The regular assessment; individual units can override it
Late fee (\$) and Grace period (days)	Applied automatically to charges still unpaid after the grace period (see the Financials chapter)

Management agreement

Enter the agreement's **Start date** and **End / renewal date**, then the **Fee basis** (*Flat monthly fee* or *Per unit per month*) and the **Fee amount (\$)**. HOA Manager uses these to calculate your monthly management fee, shown on the association page and in the management fee report.

Reserve fund

Record the **Reserve balance (\$)** and **Balance as of** date, the **Annual contribution (\$)**, the date of the **Last reserve study**, and the **Interest rate (%)** and **Inflation rate (%)** used for the 30-year reserve projection.

Notes

Internal notes are visible only to your company's staff, for example transition details or board preferences.

What HOA Manager sets up for you

When you add an association, HOA Manager prepares two things so you can start straight away.

A standard HOA chart of accounts, with separate operating and reserve funds:

Range	Accounts
1000-1200	Operating cash, reserve cash, owner receivables, prepaid expenses
2000-2100	Accounts payable, prepaid assessments
3000-3100	Operating and reserve fund balances
4000-4700	Assessment, special assessment, late fee, interest, violation fine and amenity income; reserve contributions and interest
5000-5950	Management fees, administrative, legal, insurance, utilities, landscaping, pool, repairs, security, taxes, bad debt
6000	Reserve expenditures

You can add, rename or deactivate accounts under **Banking & GL**.

A compliance calendar of typical recurring obligations, found under **Deadlines & tasks**:

- Prepare and adopt next year's budget
- File the federal tax return (Form 1120-H or 1120)
- File the state annual report or corporate renewal
- Hold the annual owners meeting and board election
- Review insurance coverage before renewal
- Annual financial review or audit

- Update the reserve study
- Monthly financial package to the board

Important: The calendar's dates are starting points. Adjust them to the association's governing documents and state law.

If you're a community manager (not an owner or administrator), you're added to the new association's management team automatically, so you can see it.

The association page

Click an association's name to open its overview. The example below is Oak Ridge HOA.

Demo Management
 HOA Manager

Working in
Oak Ridge HOA

Dashboard

Associations

Deadlines & tasks 3

COMMUNITY

Units

Owners

Board members

Bylaws & governing docs

Amendments 6

Announcements

OPERATIONS

Work orders 2

Violations

Architectural review 4

Meetings

FINANCIALS

Receivables

Billing

Collections

Payables 4

Budgets

Banking & GL

Reports

RECORDS

Vendors

Contracts

Insurance

Reserve studies

Resale & estoppel

Documents

COMPANY

Neighborhood links 1

Staff

Find an association, owner, address, work order...

Associations / Oak Ridge HOA

Oak Ridge HOA

 Homeowners Association · Macon, GA

Active

Edit

Units
48
 48 owners on file

Owner balances due
\$3,280
 9 units with a balance

Open work orders
4

Open violations
2

ARC requests pending
3

Invoices to approve
2

Neighborhood app connection

Status Connected

Instance <https://oakridge-hoa.test>

Last heard from **11 hours ago**

Version **2.4.1**

Manage connection

Work areas

Units

Owners

Board members

Bylaws & governing docs

Amendments

Work orders

Violations

Architectural review

Meetings

Receivables

Billing

Collections

Payables

Budgets

Banking & GL

Reports

Contracts

Insurance

Reserve study

Resale & estoppel

Documents

Deadlines & tasks

Upcoming

Meetings

Nov 2, 2026 7:00 PM — Fall social committee planning

Nov 5, 2026 6:30 PM — November board meeting

Nov 19, 2026 6:00 PM — Budget workshop for 2027

Deadlines

Details

Legal name **Oak Ridge Homeowners Association, Inc.**

Address **100 Oak Ridge Pkwy, Macon, GA, 31210**

EIN **58-1234567**

Fiscal year starts **January**

Assessment **\$165.00 monthly**

Late fee **\$25.00 after 15 days**

Management fee **\$672.00/month**

Agreement **Oct 1, 2023 – Oct 31, 2027**

Reserve balance **\$86,400.00 as of Oct 1, 2026**

Board of directors

Manage

Member at Large — Dominique McDermott

President — Tod Gibson (term ends Dec 31, 2027)

Secretary — Amanda Marvin

Treasurer — Germaine Brakus

Vice President — Coy Schinner (term ends Dec 3, 2026)

Management team

☐ Alex Accountant Accountant

☐ primary

☐ Andre Admin Administrator

☐ primary

☒ Marcus Manager Community Manager

☒ primary

☐ Olivia Owner Owner

☐ primary

☐ Priya Patel Community Manager

☐ primary

☒ Sofia Staff Staff

☐ primary

☐ Victor Viewer Read-only

☐ primary

Owners, administrators and accountants see every association. Managers, staff and read-only users see only associations they're assigned to.

Save team

The association page for Oak Ridge HOA

Opening an association's page also sets it as your **Working in** association in the sidebar.

Headline numbers

The cards across the top show **Units** (and owners on file), **Owner balances due** (and how many units have a balance), **Open work orders**, **Open violations**, **ARC requests pending** and **Invoices to approve**. Click any card to open the matching list, filtered to this association.

Neighborhood app connection

This card shows whether the HOA's resident app is connected:

- **Connected:** the status, the app's address, when it was last heard from and its version. Click **Manage connection** to open the connection page.
- **Not connected:** an explanation of what connecting does. Click **Create invite code** to invite the HOA (see chapter 4).

Work areas

Buttons that open each part of HOA Manager already filtered to this association: Units, Owners, Board members, Bylaws & governing docs, Amendments, Work orders, Violations, Architectural review, Meetings, Receivables, Billing, Collections, Payables, Budgets, Banking & GL, Reports, Contracts, Insurance, Reserve study, Resale & estoppel, Documents and Deadlines & tasks.

Upcoming

The next scheduled **Meetings**, open **Deadlines** with how soon each is due, and any **Insurance renewing soon** (within 60 days).

Details

A summary of the profile: legal name, address, EIN, fiscal year start, assessment, late fee, monthly management fee, agreement dates and reserve balance.

Board of directors

The active board members with their positions and when their terms end. Click **Manage** to edit them. For connected HOAs the board comes from the Neighborhood app.

Management team

Shows which staff manage this association. If you can manage staff, you can change the team here:

1. Tick each person who should work on this association.
2. Choose one **primary** manager. They appear as *Manager* in the association list.
3. Click **Save team**.

Tip: Owners, administrators and accountants see every association whether or not they're ticked. The team list matters for community managers, staff and read-only users.

How to edit an association

1. Open the association and click **Edit**.
2. Change any field.
3. Click **Save changes**.

Common updates are moving the **Status** from *Onboarding* to *Active*, recording a new **Reserve balance** after the year-end close, and updating the **Management agreement** dates at renewal.

When you stop managing an association

Change its **Status** to **Inactive** (paused) or **Terminated** (the contract ended), and set the **End / renewal date** under *Management agreement*. Its records stay available for reference and audits.

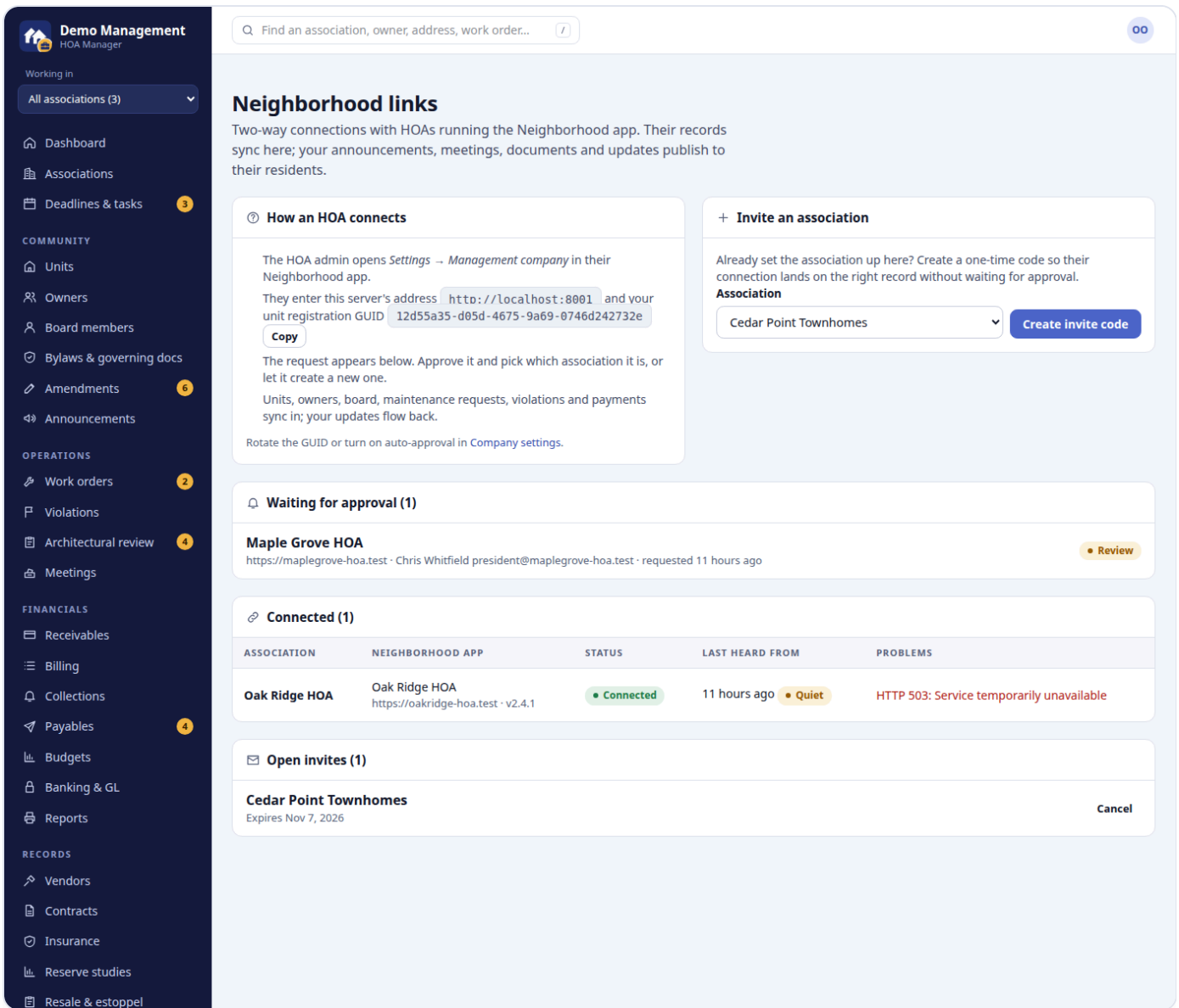
If the association is connected to a Neighborhood app, disconnect it first (chapter 4) so its residents stop receiving updates from your company.

Connecting the Neighborhood app

Many HOAs use the **Neighborhood app** as their resident portal: owners pay dues online, report maintenance problems, see violations and read announcements. When an HOA's Neighborhood app is connected to your company in HOA Manager, the two systems keep each other up to date:

- **From the HOA to you:** homes, owners, the board, maintenance requests, violations, online payments and meetings appear in HOA Manager automatically.
- **From you to the HOA:** your announcements, meetings, documents, work-order progress, violation updates and architectural review decisions reach the HOA's residents.

Each connection links **one** Neighborhood app to **one** association in your company. Open **Neighborhood links** under **Company** in the sidebar to manage them.



The Neighborhood links page

How connecting works

There are two ways to start a connection. Both end with the same secure link.

Start	Best when	Approval
The HOA asks, using your unit registration GUID	The HOA is new to you, or you haven't set it up in HOA Manager yet	You approve or decline the request
You send an invite code	You've already added the association in HOA Manager	Automatic: the code is a pre-approval for that association

Behind the scenes, the two systems exchange keys and sign every message, so only your company and that HOA can read or send updates on the connection. Either side can disconnect at any time.

How to share your registration GUID

1. Open **Neighborhood links**. The **How an HOA connects** card shows this server's address and your **unit registration GUID**.
2. Click **Copy** next to the GUID.
3. Send the HOA's administrator both the server address and the GUID.

The HOA administrator then opens **Settings** → **Management company** in their Neighborhood app, enters the address and GUID, and sends the request. It appears in **Waiting for approval** on your Neighborhood links page, a yellow number appears next to *Neighborhood links* in the sidebar, and the dashboard shows a banner.

Tip: The GUID only lets an HOA *ask* to connect; you still decide. If you'd rather approve everything automatically, see *How to handle connection requests automatically* in chapter 2. To stop new requests that use an old GUID, use **Issue a new GUID** in Company settings. Existing connections are not affected.

How to invite an association with a code

Use an invite code when the association already exists in HOA Manager. The connection lands on the right record with no approval step.

1. Open **Neighborhood links**. In **Invite an association**, choose the **Association**. Or open the association's page and click **Create invite code** in the *Neighborhood app connection* card.
2. Click **Create invite code**.
3. A green box shows the code (for example `ABCD-EFGH-JKLM`) and when it expires. Click **Copy** and send it to the HOA administrator with your server address and registration GUID.

Important: The code is shown **only once** and expires after 14 days. It works once. If it's lost

or expires, create a new code; the old one stops working.

Open codes are listed under **Open invites**. Click **Cancel** to withdraw one.

In the example, Cedar Point Townhomes is still onboarding and has an open invite.

How to review a connection request

1. Open **Neighborhood links** and click the request under **Waiting for approval** (it shows a **Review** badge).
2. Check the HOA's name, its app address, and the contact who asked. Make sure it is an HOA you manage.

The screenshot displays the 'Demo Management HOA Manager' interface. On the left is a dark sidebar with navigation links: Dashboard, Associations, Deadlines & tasks (3), COMMUNITY (Units, Owners, Board members, Bylaws & governing docs, Amendments (6), Announcements), OPERATIONS (Work orders (2), Violations, Architectural review (4), Meetings), FINANCIALS (Receivables, Billing, Collections, Payables (4), Budgets, Banking & GL, Reports), and RECORDS (Vendors). The main content area has a search bar at the top. Below it, the breadcrumb 'Neighborhood links / Maple Grove HOA' is shown. The title 'Maple Grove HOA' is followed by the URL 'https://maplegrove-hoa.test' and a yellow badge 'Awaiting approval'. A section titled 'Approve this connection' contains a message: 'Maple Grove HOA wants to connect to your company. Requested by Chris Whitfield president@maplegrove-hoa.test. Check the address below matches an HOA you manage before approving.' There are two radio buttons: 'Attach to an existing association' (selected) and 'Create a new association named "Maple Grove HOA"'. A dropdown menu shows 'Cedar Point Townhomes'. Below this is a blue 'Approve and connect' button. A text input field for 'Reason (sent to the HOA)' contains 'Optional', with a red 'Decline' button to its right. Two panels at the bottom show 'Recent events from the neighborhood' and 'Commands sent to the neighborhood', both with 'Nothing received yet' and 'Nothing sent yet' respectively. A 'Connection' panel on the right lists details: Association (—), Link ID (e7773648-1cf5-4a90-83bf-6d7269681de7), Started by (Request from the neighborhood), Instance ID (c37d1a95-c291-41fd-9782-b30e1ff03d00), App version (2.4.1), Contact (Chris Whitfield, president@maplegrove-hoa.test), Approved (—), Activation (—), Last heard from (Never), and Last sent to (Never).

Reviewing Maple Grove HOA's request to connect

Approve the request

Under **Approve this connection**, choose one option:

- **Attach to an existing association**, then pick it from the list. Use this when you've already added the association. Only associations that aren't already connected are listed.
- **Create a new association named "..."**. HOA Manager creates the association from the request (name, address and website), with the standard chart of accounts and compliance calendar. Its status starts as *Onboarding*.

Then click **Approve and connect**. The connection becomes **Connected**, the HOA's app receives its keys, and its records start arriving within a few minutes.

Decline the request

Optionally type a **Reason (sent to the HOA)**, then click **Decline** and confirm. The HOA sees your reason. The request moves to **History**.

What syncs, and in which direction

From the HOA's Neighborhood app to HOA Manager

Neighborhood app	Appears in HOA Manager as
Houses: address, lot, rental and tenant details, lease dates, fee category and rate	Units (the fee rate becomes the unit's assessment unless you override it)
Property owners: names, contact details, which houses they own	Owners , linked to their units
Residents with a board position	Board members
Maintenance requests, and comments on them	Work orders , marked <i>From HOA portal</i> , with notes
Violations	Violations
Completed online dues payments (refunds remove them)	Payments on the owner's ledger

Neighborhood app	Appears in HOA Manager as
Meetings on the HOA calendar	Meetings
App version and record counts	Shown on the connection page

When a connection is first approved, and whenever you click **Request full sync**, the HOA sends a complete copy: every house, owner and board member, open requests and violations, 24 months of payments and upcoming meetings.

From HOA Manager to the HOA's residents

You do this in HOA Manager	Residents see
Send an announcement	It is posted in their portal, and emailed if you chose to
Publish a meeting , edit it or cancel it	It appears on, or is updated or cancelled on, the HOA calendar
Publish a document or adopted bylaws	It appears in their documents
Change a portal work order's status, or add a note shared with the household	Progress on their maintenance request
Update a portal violation	The new status, fine or deadline
Decide an architectural request	The HOA's admins are notified of the decision
Send an amendment notice	An announcement with the proposed text and voting dates

Who wins when both sides change something

- **Houses, owners and board members:** the HOA's app is the source of truth. If you edit them in HOA Manager, the next sync from the HOA replaces your changes. Ask the HOA to correct them in their app.
- **Maintenance requests:** if the HOA marks a request resolved or closed, the work order closes. Otherwise your work order status stands, and residents see your progress.

- **Violations:** the most recent change from either side wins.
- **Architectural decisions:** made in HOA Manager.

What is **not** shared: your owner ledgers (charges, late fees, collections), budgets, payables, vendors, contracts, insurance, reserve studies, internal notes and staff stay in HOA Manager. Resident logins, polls and amenity bookings stay in the Neighborhood app.

The connection page

Click a connected association on **Neighborhood links** (or **Manage connection** on its association page) to see the connection in detail.

Demo Management
HOA Manager

Working in
All associations (3)

Dashboard
Associations
Deadlines & tasks 3

COMMUNITY
Units
Owners
Board members
Bylaws & governing docs
Amendments 6
Announcements

OPERATIONS
Work orders 2
Violations
Architectural review 4
Meetings

FINANCIALS
Receivables
Billing
Collections
Payables 4
Budgets
Banking & GL
Reports

RECORDS
Vendors
Contracts
Insurance
Reserve studies
Resale & estoppel

Find an association, owner, address, work order...

Neighborhood links / Oak Ridge HOA

Oak Ridge HOA

https://oakridge-hoa.test

Connected
Test connection
Request full sync
Pause

Recent events from the neighborhood
319 processed

RECEIVED	EVENT	RECORD	RESULT
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70672	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70624	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70576	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70480	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70432	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70671	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70623	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70575	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70479	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70431	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70670	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70622	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70574	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70526	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70430	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70573	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70525	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70477	Processed
Oct 24 3:20 AM	hoa_fee_payment.upserted	#70429	Processed

Connection

Association
Link ID
Started by
Instance ID
App version
Contact
Approved
Activation
Last heard from
Last sent to
Last problem

Oak Ridge HOA
eeab58c7-65d3-4af1-9cd6-db6b70b05f13
Request from the neighborhood
467f2f99-d249-4ee3-9d83-bfff2221706d6
2.4.1
Janet Brooks
board@oakridge-hoa.test
May 24, 2026 3:19 AM by Marcus Manager
Delivered 5 months ago
11 hours ago
14 hours ago
HTTP 503: Service temporarily unavailable

Reported by the neighborhood

Houses
Owners
Members
Open violations
Open maintenance
As of 11 hours ago

48
48
61
2
3

Disconnect

Stops all syncing in both directions. Records already synced stay here. Reconnecting needs a new request from the HOA.
Reason (optional, sent to the HOA)
Disconnect

The connection page for Oak Ridge HOA, with events, commands and connection details

- **Connection:** which association it's linked to, the link and instance IDs, who started it, the HOA's app version and contact, when it was approved, whether activation was delivered, and when each side last heard from the other. **Last problem** shows the most recent error.
- **Reported by the neighborhood:** the HOA's own counts (houses, owners, members, open maintenance and violations) from its last check-in.
- **Recent events from the neighborhood:** the last 50 updates received (for example *house.upserted*) with their result: **processed**, **duplicate**, **ignored** or **failed**, plus an error message for failures.
- **Commands sent to the neighborhood:** the last 50 updates you sent (for example *announcement.publish*), with status, tries and errors. Failed ones show when the next

automatic retry happens.

Buttons on the connection page

Button	What it does
Test connection	Checks that HOA Manager can reach the HOA's app right now
Request full sync	Asks the HOA's app to resend all of its records
Pause	Stops syncing in both directions without deleting anything; the HOA keeps checking in
Resume	Restarts syncing after a pause
Retry now	Re-sends a failed command immediately (next to the failed command)
Disconnect	Ends the connection permanently (see below)

How to disconnect an HOA

1. Open the connection page.
2. In **Disconnect**, optionally type a reason. It is sent to the HOA.
3. Click **Disconnect** and confirm.

Syncing stops in both directions and the keys are destroyed. Records already synced stay in HOA Manager. Reconnecting needs a new request from the HOA (or a new invite code). The HOA can also disconnect from its side; the link then shows as *Disconnected* in **History**.

Important: Disconnect an HOA before marking its association *Terminated*, so its residents stop receiving your updates.

Troubleshooting

The link shows "Quiet"

On **Neighborhood links**, a **Quiet** badge means the HOA's app hasn't checked in for over an hour. Common causes:

- The HOA's site is down or under maintenance. Click **Test connection** on the connection page.
- The connection was paused from the HOA's side.
- Their app's background jobs aren't running. Ask the HOA's administrator or their host to check.

Commands show "failed"

A failed command (for example an announcement) is retried automatically, waiting a little longer each time: from 1 minute up to 2 hours, for 8 tries in total. The HOA's app can also collect anything it missed the next time it checks in, so updates usually arrive once the site is back. To send one immediately, click **Retry now**. The error (for example *HTTP 503: Service temporarily unavailable*) also appears under **Problems** on the links list.

Events show "failed"

Usually an update arrived before something it depends on. For example, a payment arrived for a house HOA Manager hasn't received yet. Click **Request full sync**; the complete resend fixes the order.

Owner or unit details are wrong

For connected HOAs, correct them in the HOA's Neighborhood app. Changes made in HOA Manager are overwritten by the next update from the HOA.

The HOA says its code or GUID doesn't work

- An invite code works once and expires after 14 days. Create a new one.
- If you clicked **Issue a new GUID**, send the HOA the new GUID.
- An HOA that is already connected must disconnect before it can connect again.

Community records

Community records are the roster of each association: its **units** (homes, lots and condos), the **owners** of those units, and the **board members** who govern it. Billing, receivables, violations, work orders and estoppel certificates all depend on these records, so they're worth keeping accurate.

Each association gets its records in one of three ways:

- **From the Neighborhood app.** When an association is connected (see *Connecting the Neighborhood app*), its houses, owners and board members sync in automatically and stay up to date. These records show a **From Neighborhood app** badge.
- **CSV import.** For associations that aren't on the Neighborhood app, load units and owners from a spreadsheet.
- **By hand.** Add or edit any unit, owner or board member from its screen.

All three areas are under **Community** in the sidebar. Like every list in HOA Manager, they show the association picked in the sidebar's **Working in** switcher, or all of your associations when **All associations** is selected.

Who can do what: anyone with access to an association can view its records. Adding, editing, deleting and importing need a role that can edit records (everyone except **Read-only**). Managers and staff only see the associations they are assigned to.

Units at a glance

Open **Units** in the sidebar to see every home, lot and condo in your associations. For each unit the list shows the address and unit number, lot, type, occupancy (owner-occupied or rental, with the tenant's name), owners and the current **Balance** owed to the association.

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Oak Ridge HOA

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Find an association, owner, address, work order...

oo

Units

Homes, lots and condos across your associations, with owners and balances.

Import CSV

Add unit

Address, unit, lot or tenant

Rental: any

Filter

UNIT	LOT	TYPE	OWNERS	OCCUPANCY	BALANCE
104 Maple Dr From Neighborhood app	1	Single-family	Tod Gibson	Owner	\$190.00
108 Birch Ct From Neighborhood app	2	Single-family	Coy Schinner	Owner	\$0.00
112 Cedar Way From Neighborhood app	3	Single-family	Germaine Brakus	Owner	\$0.00
116 Hickory Trl From Neighborhood app	4	Single-family	Amanda Marvin	Owner	\$760.00
120 Magnolia Pl From Neighborhood app	5	Single-family	Dominique McDermott	Owner	\$50.00
124 Oak Ln From Neighborhood app	6	Single-family	Dolly Hayes	Owner	\$0.00
128 Maple Dr From Neighborhood app	7	Single-family	Jacquelyn Bednar	Owner	\$0.00
132 Birch Ct From Neighborhood app	8	Single-family	Verna Schmitt	Owner	\$760.00
136 Cedar Way From Neighborhood app	9	Single-family	Gideon Sauer	Rental Ocie Jast	\$0.00
140 Hickory Trl From Neighborhood app	10	Single-family	Eliane West	Owner	\$0.00
144 Magnolia Pl From Neighborhood app	11	Single-family	Michale Casper	Owner	\$0.00
148 Oak Ln From Neighborhood app	12	Single-family	Mattie O'Connell	Owner	\$190.00
152 Maple Dr From Neighborhood app	13	Single-family	Lempi Lebsack	Owner	\$0.00
156 Birch Ct From Neighborhood app	14	Single-family	Macy Krajcik	Owner	\$0.00

The unit list for Oak Ridge HOA, showing owners, occupancy and balances

Use the filter bar at the top to narrow the list:

- **Search** looks in the address, unit number, lot number and tenant name ("Address, unit, lot or tenant").
- The rental filter shows **Rentals only** or **Owner-occupied** units.
- When **All associations** is selected, an **Association** column shows which community each unit belongs to.

Click a unit to open its page.

How to add a unit

1. Go to **Units** and click **Add unit**.
2. In the **Unit** section, choose the **Association** and enter the **Street address**. Add the **Unit number** for condos and townhomes, the **Lot number**, **City**, **State**, **ZIP**, **Type** and **Square feet**

as needed.

3. In **Assessments**, optionally set:

- **Fee category** — a grouping for billing, for example "Villa" or "Phase 2".
- **Assessment override (\$)** — the regular assessment for this unit. Leave it blank to use the association's default assessment.

4. In **Occupancy**, tick **This unit is rented out** if it's a rental, and enter the **Tenant name**, **Tenant email**, **Tenant phone**, **Lease start** and **Lease end**.

5. Add any **Internal notes** in the **Notes** section. Notes are only visible to your team.

6. Click **Add unit**.

Important: a unit always stays with the association it was created in. If a unit was added to the wrong association, delete it and add it again in the right one.

How to edit a unit

1. Open the unit and click **Edit**.
2. Change the details and click **Save changes**.

If the unit came from the Neighborhood app, the form tells you so. The HOA portal is the source of truth for the address and tenant details, so the next sync from the portal overwrites changes you make to those fields here. Make address and tenant changes in the Neighborhood app instead. Your assessment override, fee category and notes are yours to change.

The unit page

The unit page brings together everything about one home.

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 HOA Manager

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 Contracts
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Find an association, owner, address, work order...

oo

Units / 116 Hickory Trl
116 Hickory Trl
 Oak Ridge HOA · Single-family

From Neighborhood app
 Edit
 Delete

Synced from the HOA's Neighborhood app (last 11 hours ago). The HOA portal is the source of truth for the address and tenant details.

Balance
\$760.00
 Owed to the association

Assessment
\$165.00
 Unit override

Open work orders
0

Open violations
0

Recent ledger activity
 Full ledger →

DATE	TYPE	DESCRIPTION	AMOUNT
Oct 24, 2026	Late fee	Late fee — October 2026	\$25.00
Oct 24, 2026	Late fee	Late fee — September 2026	\$25.00
Oct 24, 2026	Late fee	Late fee — August 2026	\$25.00
Oct 24, 2026	Late fee	Late fee — July 2026	\$25.00
Oct 1, 2026	Charge	Monthly assessment — October 2026	\$165.00
Sep 1, 2026	Charge	Monthly assessment — September 2026	\$165.00
Aug 1, 2026	Charge	Monthly assessment — August 2026	\$165.00
Jul 1, 2026	Charge	Monthly assessment — July 2026	\$165.00
Jun 7, 2026	Payment	Payment via neighborhood portal (pi_afz9ykl67ojbfy)	-\$165.00
Jun 1, 2026	Charge	Monthly assessment — June 2026	\$165.00

Owners

Amanda Marvin
 amanda.marvin4@example.test
 Remove

Link an existing owner...

+ Link

Add a new owner

Details

Address
 Lot
 Square feet
 Fee category
 Occupancy

116 Hickory Trl, Macon, GA, 31210
 4
 —
 Standard lot
 Owner-occupied

Open work orders

No open work orders.

A unit page with its balance, ledger activity, owners and details

- **Balance** — what the owner currently owes (or, if negative, has paid in advance), with "Owed to the association" or "Paid up" underneath.
- **Assessment** — the regular assessment this unit is billed, and whether it's the **Association default** or a **Unit override**.
- **Open work orders** and **Open violations** — counts, with the items listed further down.
- **Recent ledger activity** — the latest charges, late fees and payments. Click **Full ledger** to open the unit's account under Receivables, where you can post payments and print statements (see *Financials*).
- **Owners** — everyone who owns the unit. You can link and remove owners here (see below).

- **Details** — address, lot, square feet, fee category and occupancy, plus the tenant and lease when it's a rental.
- **Open work orders, Violations** and **Architectural requests** — this unit's history in each area.

A blue note at the top tells you when the unit is synced from the Neighborhood app, and how long ago it last synced.

How to delete a unit

1. Open the unit and click **Delete**.
2. Confirm.

Deleting removes the unit from lists, but its history (ledger entries, work orders and violations) is kept for your records.

Owners

Owners lists the homeowners of record in your associations, with their email, phone, how they prefer to be contacted, and the units they own.

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Find an association, owner, address, work order... 1

Owners

Homeowners of record, their contact details and the units they own.

+ Add owner

Filter

OWNER	EMAIL	PHONE	UNITS	PREFERS
Jacquelyn Bednar From Neighborhood app	jacquelyn.bednar7@example.test	(478) 555-0250	128 Maple Dr	Email
Karolann Bernhard From Neighborhood app	karolann.bernhard38@example.test	(478) 555-6656	252 Birch Ct	Email
Germaine Brakus From Neighborhood app	germaine.brakus3@example.test	(478) 555-5929	112 Cedar Way	Email
Betty Brown From Neighborhood app	betty.brown40@example.test	(478) 555-4532	260 Hickory Trl	Email
Michale Casper From Neighborhood app	michale.casper11@example.test	(478) 555-8892	144 Magnolia Pl	Email
Rasheed Conn From Neighborhood app	rasheed.conn35@example.test	(478) 555-8649	240 Magnolia Pl	Email
Jean Corwin From Neighborhood app	jean.corwin48@example.test	(478) 555-2136	292 Oak Ln	Email
Amira Durgan From Neighborhood app	amira.durgan47@example.test	(478) 555-8147	288 Magnolia Pl	Email
Laila Ebert From Neighborhood app	laila.ebert30@example.test	(478) 555-8157	220 Oak Ln	Email
Izaiah Effertz From Neighborhood app	izaiah.effertz25@example.test	(478) 555-9268	200 Maple Dr	Email
Clifford Fadel From Neighborhood app	clifford.fadel17@example.test	(478) 555-7903	168 Magnolia Pl	Email
Anastacio Gaylord From Neighborhood app	anastacio.gaylord41@example.test	(478) 555-5098	264 Magnolia Pl	Email
Tod Gibson From Neighborhood app	tod.gibson1@example.test	(478) 555-7232	104 Maple Dr	Email

The owner list with contact details and the units each owner holds

Search by name, email or phone using the box in the filter bar.

How to add an owner

1. Go to **Owners** and click **Add owner**.
2. Choose the **Association**.
3. Enter the owner's **First name**, **Last name**, **Email**, **Phone** and **Alternate phone**.
4. Enter a **Mailing address** only if it's different from the unit address, for example for an owner who rents the home out and lives elsewhere.
5. Choose the **Preferred contact** method: email, mail, phone or text message.
6. In **Units owned**, select the unit or units this person owns. Only units in the owner's association are listed. Hold Ctrl (Windows) or ⌘ (Mac) to pick several.
7. Add any **Internal notes** and click **Add owner**.

Tip: when the association has no units yet, you can add the owner now and link units later

from each unit's page.

How to link an owner to a unit from the unit page

1. Open the unit.
2. In the **Owners** card, pick a name from **Link an existing owner...** and click **Link**.
3. To add someone who isn't on file yet, click **Add a new owner**.

To remove an owner from a unit, for example after a sale, click **Remove** next to their name. The owner record stays on file.

Owners synced from the Neighborhood app

Owners that come from the Neighborhood app show a **From Neighborhood app** badge. As with units, the HOA portal is the source of truth for their details, so update names and contact details in the portal.

Board members

Board members lists each association's directors and officers, grouped by association, with their position, contact details, term dates and status.

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Find an association, owner, address, work order... 7

oo

Board members

Directors and officers for each association, with term dates.

+ Add board member

Active and inactive Filter

Oak Ridge HOA

Association --

NAME	POSITION	TERM	CONTACT	STATUS
Tod Gibson	President	Jan 1, 2025 – Dec 31, 2027	tod.gibson1@example.test	Active Edit Delete
Coy Schinner	Vice President	— – Dec 3, 2026 Term ends soon	coy.schinner2@example.test	Active Edit Delete
Germaine Brakus	Treasurer	— – open-ended	germaine.brakus3@example.test	Active Edit Delete
Amanda Marvin	Secretary	— – open-ended	amanda.marvin4@example.test	Active Edit Delete
Dominique McDermott	Member at Large	— – open-ended	dominique.mcdermott5@example.test	Active Edit Delete

Willow Creek Condominiums

Association --

NAME	POSITION	TERM	CONTACT	STATUS
Torrey Monahan	President	Dec 1, 2025 – Dec 24, 2027	torrey.monahan.w1@example.test	Active Edit Delete
Kacie Mayert	Treasurer	Dec 1, 2025 – Dec 24, 2027	kacie.mayert.w2@example.test	Active Edit Delete
Eula Marquardt	Secretary	Dec 1, 2025 – Oct 4, 2026 Term expired	eula.marquardt.w3@example.test	Active Edit Delete

Board members grouped by association, with term badges

The positions available are President, Vice President, Treasurer, Secretary, Director and Member at Large.

Two badges help you plan elections and renewals:

Badge	Meaning
Term ends soon	The member's term ends within the next 60 days.
Term expired	The term end date has passed but the member is still marked active.

Badges only appear on active members. Use the status filter to show active, inactive, or both.

How to add a board member

1. Go to **Board members** and click **Add board member**.
2. Choose the **Association**.

3. Optionally pick the **Owner record** for this person. When you do, **Name**, **Email** and **Phone** default to the owner's details if you leave them blank. Choose **Not linked to an owner** for someone who isn't on file, such as a developer's representative.
4. Choose the **Position** and enter the **Term start** and **Term end** dates.
5. Leave **Currently serving** ticked for a sitting member.
6. Click **Add board member**.

How to record a change on the board

- **A member's term ends or they resign:** click **Mark inactive** next to their name. They stay on record for your history but drop out of the active board.
- **A member is re-elected:** click **Edit**, update **Term start** and **Term end**, and save.
- **A new officer takes over:** add the new member, then mark the previous officer inactive.

Board members of associations connected to the Neighborhood app sync in from the portal, where board positions are managed.

Importing units and owners from a CSV file

For associations that aren't on the Neighborhood app, you can load the whole roster from a spreadsheet instead of typing it in.

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HOA Manager

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Find an association, owner, address, work order...

Units / Import

Import units

Load units and owners from a spreadsheet for associations that aren't on the Neighborhood app.

[Download template](#)

Upload a CSV

Association *
Choose an association

CSV file *
Choose File No file chosen
Up to 5 MB and 5,000 rows.

Columns (first row must be headers; only `street_address` is required):

```
street_address,unit_number,lot_number,city,state,postal_code,unit_type,owner_first_name,owner_last_name,owner_email,owner_phone,mailing_address
```

- A row matching an existing unit (same street address and unit number) updates it instead of adding a duplicate.
- Owners are matched by email within the association, so one owner with several units is created once and linked to each.
- `unit_type` is one of single_family, townhome, condo, lot or commercial (blank = single-family).
- Associations on the Neighborhood app sync their roster automatically — no import needed.

[Cancel](#) [Import](#)

The import screen with the association picker, CSV upload and template download

How to import units and owners

1. Go to **Units** and click **Import CSV**.
2. Click **Download template** to get a CSV file with the right column headings.
3. Fill in one row per unit (or per owner of a unit). Save the file as CSV.
4. Back on the import screen, choose the **Association**, choose your **CSV file** and click **Import**.
5. Review the results (see below), then click **View units**.

Files can be up to 5 MB and 5,000 rows.

Template columns

Column	What to enter
<code>street_address</code>	Required. The unit's street address.
<code>unit_number</code>	The unit or apartment number, for condos and townhomes.

Column	What to enter
<code>lot_number</code>	The lot number.
<code>city</code> , <code>state</code> , <code>postal_code</code>	The unit's city, two-letter state and ZIP code.
<code>unit_type</code>	Single-family, Townhome, Condo, Lot or Commercial. Either the name or the code (e.g. <code>townhome</code>) works.
<code>owner_first_name</code> , <code>owner_last_name</code>	The owner's name. Required if you give an owner email or phone.
<code>owner_email</code> , <code>owner_phone</code>	The owner's contact details.
<code>mailing_address</code>	The owner's mailing address, if different from the unit.

To record two owners for the same unit, add two rows with the same address and unit number.

How the import matches existing records

You can safely run the same import more than once, or import an updated spreadsheet later:

- **Units** are matched by street address plus unit number within the association. A match is updated (or counted as unchanged if nothing differs); otherwise a new unit is created. Units synced from the Neighborhood app are never overwritten; owners are only linked to them.
- **Owners** are matched by email within the association. Without an email, an owner is matched by name on the same unit. A matched owner only has empty phone or mailing-address fields filled in; nothing already on file is overwritten.
- **Blank rows** are ignored.

Import results

After the import, the results show:

- **Units created, Units updated, Owners added** and **Rows skipped**.
- A table of skipped rows, with the **Line** number in your file and the **Problem** (for example a missing street address, an invalid email, or an owner email without an owner name).

Fix the skipped rows in your spreadsheet and import the file again; rows that already went in are matched rather than duplicated. The whole import runs in one step, so if the file can't be read at

all, nothing is changed.

Operations

The **Operations** section of the sidebar covers the work a community manager does every day:

- **Work orders** — maintenance and repairs, including requests residents file in the HOA portal.
- **Violations** — covenant enforcement from first notice through hearing, fine and resolution.
- **Architectural review** — owner requests for exterior changes and the committee's decisions.
- **Meetings** — board, annual, budget and committee meetings, with agendas, minutes and quorum.

When an association is connected to its Neighborhood app, operations work in both directions. Requests residents submit in the portal arrive here, and the updates you make here (status changes, shared notes, decisions, published meetings) go back to the portal. Items that came from the portal show a **From HOA portal** badge.

Who can do what: anyone with access to an association can view its operations. Creating, updating and deleting need a role that can edit records (everyone except **Read-only**). Posting a violation fine to the owner ledger also needs a financial role (Owner, Administrator or Accountant).

Work orders

Open **Work orders** to see maintenance jobs across your associations. The tabs across the top filter by status: **Open** (everything not completed or cancelled), each individual status, and **All**.

Demo Management

HOA Manager

Working in

All associations (3)

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Find an association, owner, address, work order...

oo

Work orders

Maintenance and repairs across your communities, including requests residents file in the HOA portal.

+ New work order

Open 7New 2Assigned 2In progress 2On hold 1Completed 3Cancelled 0All 10

Search title or number

All associations

Any priority

Any vendor

Any source

Filter

WORK ORDER	ASSOCIATION	STATUS	PRIORITY	VENDOR / ASSIGNED	SCHEDULED	COST
WO-00008 · Water intrusion in unit 204 ceiling Plumbing · #204 · 2200 Willow Creek Dr · opened Oct 24, 2026	Willow Creek Condominiums	New	Emergency	Priya Patel	—	—
WO-00007 · Elevator inspection certificate renewal Common area · opened Oct 24, 2026	Willow Creek Condominiums	In progress	High	Priya Patel	Oct 29, 2026	—
WO-00003 · Sinkhole forming near mailbox cluster on Birch Ct From HOA portal Uncategorized · 136 Cedar Way · opened Oct 24, 2026	Oak Ridge HOA	New	High	—	—	—
WO-00001 · Pool pump making a grinding noise From HOA portal Uncategorized · 148 Oak Ln · opened Oct 24, 2026	Oak Ridge HOA	Assigned	High	BlueWave Pool Service Marcus Manager	Oct 25, 2026	est. \$950.00
WO-00002 · Streetlight out at the front entrance From HOA portal Uncategorized · opened Oct 24, 2026	Oak Ridge HOA	In progress	Medium	—	—	—
WO-00009 · Pressure wash building 1 breezeways	Willow Creek Condominiums	On hold	Low	SparkClean Janitorial	—	est. \$1 200.00

The work order list, with priority, status, vendor and source

Each row shows the work order number and title, the association and unit, priority, status, vendor or assigned staff member, scheduled date and cost. Use the filter bar to search the title or number and to narrow by priority, vendor or source (requests from the HOA portal versus ones your team opened).

Priorities and statuses

Priority	Use it for
Low	Routine jobs that can wait for the next scheduled visit.
Medium	Normal repairs.
High	Problems that affect residents or could get worse quickly.
Emergency	Safety issues and active damage (leaks, outages). Emergencies sort to the top of every list.

Status	Meaning
New	Opened but not yet assigned to a vendor or staff member.
Assigned	A vendor or staff member has the job.
In progress	Work has started.
On hold	Waiting on parts, a quote approval or access.
Completed	Work is done. Requires resolution notes.
Cancelled	No longer needed.

How to open a work order

1. Go to **Work orders** and click **New work order**.
2. In the **Request** section, choose the **Association**, the **Unit** (leave it as *Common area / none* for common areas), the **Category** and **Priority**, and enter a **Title** and **Description**.
3. In **Assignment & cost**, optionally choose a **Vendor** and **Assigned staff** member, the **Scheduled for** date, and the **Estimated cost (\$)**.
4. Click **Create work order**.

The work order gets a number such as WO-00012. If you chose a vendor or a staff member, it starts as **Assigned**; otherwise it starts as **New**.

The work order page

The screenshot displays the 'Demo Management' HOA Manager interface. On the left is a dark sidebar with navigation menus: 'Working in' (All associations (3)), 'Dashboard', 'Associations', 'Deadlines & tasks' (3), 'COMMUNITY' (Units, Owners, Board members, Bylaws & governing docs, Amendments (6), Announcements), 'OPERATIONS' (Work orders (2), Violations, Architectural review (4), Meetings), 'FINANCIALS' (Receivables, Billing, Collections, Payables (4), Budgets, Banking & GL, Reports), and 'RECORDS' (Vendors, Contracts, Insurance, Reserve studies, Resale & estoppel, Documents). The main content area has a search bar at the top. Below it, the work order 'WO-00001' is titled 'Pool pump making a grinding noise' for 'Oak Ridge HOA · 148 Oak Ln'. It is marked as 'Assigned' and has buttons for 'Enter vendor invoice' and 'Edit'. A blue banner states: 'Submitted by Mattie in the HOA portal. Status changes and notes you share are sent back to the portal; internal notes stay here.' The 'Details' panel lists: Priority (High), Category (—), Unit (148 Oak Ln), Vendor (BlueWave Pool Service), Assigned to (Marcus Manager), Scheduled (Oct 25, 2026), Estimated cost (\$950.00), Actual cost (—), Source (HOA portal), and Opened (Oct 24, 2026 3:19 AM). A note mentions 'Loud grinding from the pump room since Saturday.' The 'Timeline' panel shows three notes: a quote expected around \$950 (Oct 24, 2026 3:19 AM, Our team only), BlueWave coming tomorrow morning (Oct 24, 2026 3:19 AM, Our team only), and a note about increasing noise and cloudy pool (Oct 24, 2026 3:19 AM, From the HOA portal). The 'Email to vendor' panel includes a 'Send to' field (marco.silva@bluewave.test), a 'Note' field, and a 'Send work order' button. The 'Update status' panel shows the status as 'Assigned' and a 'Save status' button.

A work order that came from the HOA portal, with its timeline, vendor email and status panel

The work order page shows the **Details** (priority, category, unit, vendor, assigned staff, scheduled date, estimated and actual cost, source and when it was opened), a **Timeline** of notes, and panels to **Update status** and to **Email to vendor**.

When the request came from the HOA portal, a blue note at the top tells you who submitted it and reminds you that status changes and shared notes are sent back to the portal.

How to update a work order's status

1. Open the work order.

2. In **Update status**, choose the new **Status**.
3. When completing the work order, describe what was done in **Resolution notes**. They're required to mark it **Completed**.
4. Click **Save status**.

For a request from the HOA portal, the new status is sent to the portal, so the resident sees it on their request:

Status here	What the resident sees in the portal
New, Assigned	Open
In progress, On hold	In progress
Completed	Resolved, with your resolution notes
Cancelled	Closed

Tip: to change the vendor, schedule or costs, click **Edit**. Record the **Actual cost (\$)** when the vendor's bill comes in so the work order history shows what the repair really cost.

How to add a note and choose who sees it

1. Open the work order and type in **Add a note**.
2. Under **Who can see this note**, choose:
 - **Our team only** — stays in HOA Manager. Use this for quotes, internal reminders and anything sensitive.
 - **HOA staff only** — also sent to the HOA's staff in the Neighborhood app. It's never shown to the household.
 - **HOA staff and the household** — also shown to the resident who submitted the request.
3. Click **Add note**.

Notes appear in the **Timeline** with the author, time and visibility. Notes residents or HOA staff add in the portal also appear here, marked **From the HOA portal**.

Work orders your team opened (rather than ones from the portal) aren't linked to the portal, so their notes always stay with your team.

How to email a work order to a vendor

1. Open the work order. The **Email to vendor** card appears once a vendor is assigned.
2. Check the **Send to** address. It defaults to the vendor's email.
3. Add a **Note (access instructions, timing...)**, such as a gate code or the best time to visit.
4. Click **Send work order**.

The vendor receives the job details from your company's email address (see *Email sending* in *Company setup*), and an internal note is added to the timeline recording that it was sent.

How to enter the vendor's invoice for a work order

1. Open the work order and click **Enter vendor invoice**.
2. The invoice form opens under **Payables** with the association and work order already filled in.
3. Complete and save the invoice (see *Payables* in the *Financials* chapter).

Invoices linked to the work order are listed in its **Vendor invoices** card.

Deleting a work order

Click **Delete work order** on the work order page and confirm. Requests that came from the HOA portal can't be deleted. Cancel them instead, so the resident sees the outcome.

Violations

Violations tracks covenant enforcement: what was observed, at which unit, the compliance deadline, any hearing, any fine, and how it was resolved.

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 HOA Manager

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Violations
 Covenant enforcement from first notice through hearing, fine and resolution.

[+ Record violation](#)

Open 5
 Warning 1
 Notice sent 1
 Hearing scheduled 1
 Appealed 1
 Resolved 1
 Fine paid 0
 Closed 0
 All 6

VIOLATION	ASSOCIATION	UNIT	STATUS	COMPLY BY	FINE
VIO-00002 · Pets Dog off leash in courtyard; repeated complaints.	Willow Creek Condominiums	—	Open	Nov 7, 2026	—

The violations list with categories, statuses, fines and compliance deadlines

The list shows each violation's number, association, unit, category, status, fine and **Comply by** date. A **Past due** badge appears when the compliance deadline has passed while the violation is still open. Filter by status, category or source, or search by number or description.

Violation statuses

Status	Meaning
Open	Recorded, no notice sent yet.
Warning	A courtesy warning was given.
Notice sent	A formal violation notice was sent to the owner.
Hearing scheduled	The owner has a hearing before the board. Requires a hearing date.
Appealed	The owner has appealed.
Resolved	The owner corrected the problem.

Status	Meaning
Fine paid	The fine was paid.
Closed	No further action.

How to record a violation

1. Go to **Violations** and click **Record violation**.
2. Choose the **Association** and the **Unit**.
3. Choose the **Category** and describe what was observed in **Description**.
4. Enter the **Observed on** date and the **Compliance deadline**.
5. Enter the **Fine (\$)**, or leave it at 0 for a courtesy notice.
6. Click **Record violation**.

Important: violations recorded here stay in HOA Manager. They aren't pushed to the HOA's Neighborhood app, which numbers its own violations. Violations the board issues in the portal sync in automatically and show **From HOA portal**.

The violation page

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Reports
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Vendors
Contracts
Insurance

Find an association, owner, address, work order...
Violations / VIO-00001
VIO-00001 · Unapproved modification
Willow Creek Condominiums · #106 · 2200 Willow Creek Dr
Hearing scheduled
Edit

Recorded in HOA Manager only — it isn't pushed to the Neighborhood app, which numbers its own violations.

Details

Unit	#106 · 2200 Willow Creek Dr
Owner	Abigale Feeney
Observed	Oct 19, 2026
Comply by	Nov 7, 2026 (in 14 days)
Hearing	Nov 3, 2026
Fine	\$100.00
Recorded by	Priya Patel

Satellite dish installed on balcony railing without approval.

Update status

Status
Hearing scheduled
Hearing date
11/03/2026
Required when scheduling a hearing.
Save status

Fine

Posted to the owner ledger on Oct 21, 2026 (\$100.00).
View unit ledger
Delete violation

Notes

Add a note

Notes stay internal.
Add note

First notice mailed and emailed to owner.
Priya Patel · Oct 24, 2026 3:20 AM · Our team only

A violation with a hearing scheduled and its fine posted to the owner ledger

The violation page shows the **Details** (unit, owner, observed date, compliance deadline with days remaining, hearing date, fine and who recorded it), **Notes**, **Update status** and **Fine**.

How to move a violation through enforcement

1. Open the violation.
2. In **Update status**, choose the next status.
3. When choosing **Hearing scheduled**, enter the **Hearing date**. It's required.
4. Click **Save status**.

Moving a violation to **Resolved** or **Closed** records the resolution date; moving it back to an open status clears it.

For a violation that came from the HOA portal, status changes are sent back to the portal. The portal doesn't have a "hearing" status, so **Hearing scheduled** appears there as **Notice sent**.

How to add a note to a violation

1. Type in **Add a note**.
2. For a violation from the HOA portal, choose who can see it, as with work orders. Otherwise notes stay internal.
3. Click **Add note**.

How to post a fine to the owner's ledger

1. Open a violation that has a unit and a fine amount.
2. In the **Fine** card, click **Post fine to owner ledger** and confirm.

The fine is charged to the unit's account as a violation fine, so it appears on the owner's balance and statement. It can only be posted once; afterwards the card shows when it was posted, with a **View unit ledger** link.

Tip: the HOA can set limits in its Neighborhood app. For a portal violation, the **Fine (\$)** field explains them, for example fines above a certain amount waiting for the HOA's approval.

Violations from the HOA portal can't be deleted. Close them instead.

Architectural review

Architectural review tracks owners' requests to change the outside of their homes: fences, paint colors, roofs, additions, solar panels and so on. Each request has a review deadline; the governing documents usually require a decision within a set number of days.

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Find an association, owner, address, work order... 7

oo

Architectural review

Owner requests for exterior changes, tracked against each committee's review deadline.

+ Log request

Pending 6 Submitted 2 Under review 2 More info needed 2 Approved 2 Approved with conditions 2 Denied 2 Withdrawn 0

Search number or description All associations Any project Filter

REQUEST	ASSOCIATION	UNIT / OWNER	STATUS	SUBMITTED	REVIEW DEADLINE
ARC-00011 · Landscaping Replace front lawn with xeriscape beds and river rock.	Willow Creek Condominiums	#207 · 2200 Willow Creek Dr Marietta Barrows	More info needed	Sep 21, 2026	Oct 21, 2026 Overdue
ARC-00005 · Landscaping Replace front lawn with xeriscape beds and river rock.	Oak Ridge HOA	160 Cedar Way Jazlyn Ondricka	More info needed	Sep 21, 2026	Oct 21, 2026 Overdue
ARC-00009 · Solar panels Install 18 roof-mounted solar panels on the rear roof plane.	Willow Creek Condominiums	#201 · 2200 Willow Creek Dr Liam Morissette	Under review	Oct 12, 2026	Nov 11, 2026 in 18 days
ARC-00003 · Solar panels Install 18 roof-mounted solar panels on the rear roof plane.	Oak Ridge HOA	136 Cedar Way Gideon Sauer	Under review	Oct 12, 2026	Nov 11, 2026 in 18 days
ARC-00012 · Addition / structure Screened porch addition on rear of home.	Willow Creek Condominiums	#302 · 2200 Willow Creek Dr Don Bradtke	Submitted	Oct 21, 2026	Nov 20, 2026 in 27 days
ARC-00006 · Addition / structure Screened porch addition on rear of home.	Oak Ridge HOA	172 Oak Ln Alexis Simonis	Submitted	Oct 21, 2026	Nov 20, 2026 in 27 days

Architectural review requests with project types, statuses and review deadlines

The list shows each request's number, unit and owner, project type, status, submitted date and **Review deadline**. An **Overdue** badge appears when a request still awaiting a decision is past its deadline.

Request statuses

Status	Meaning
Submitted	Received, not yet reviewed.
Under review	The committee is reviewing it.
More info needed	The owner needs to provide more information.
Approved	Approved as submitted.
Approved with conditions	Approved, subject to conditions you record.

Status	Meaning
Denied	Not approved. Requires decision notes explaining why.
Withdrawn	The owner withdrew the request.

How to log a request

1. Go to **Architectural review** and click **Log request**.
2. In **Applicant**, choose the **Association**, the **Unit** and the **Owner**. Only owners on record for the selected unit are listed.
3. In **Project**, choose the **Project type** and enter the **Description**, **Contractor**, **Estimated start** and **Estimated completion**.
4. Check the **Submitted on** date and the **Review deadline**. The deadline defaults to 30 days after submission; change it to match the association's rules.
5. Click **Log request**.

Requests owners file through the HOA portal arrive automatically.

How to record a decision

The screenshot displays the 'Demo Management' HOA Manager interface. On the left is a dark sidebar with navigation links categorized under 'Working in', 'COMMUNITY', 'OPERATIONS', 'FINANCIALS', and 'RECORDS'. The 'Architectural review' link is highlighted with a yellow badge showing '4'. The main content area has a search bar at the top and a header for 'ARC-00001 · Fence' with the address 'Oak Ridge HOA · 112 Cedar Way'. A yellow badge indicates the status 'Approved with conditions' and an 'Edit' button is present. Below the header are two main panels: 'Request' and 'Record decision'. The 'Request' panel lists details: Owner (Germaine Brakus), Unit (112 Cedar Way), Contractor (ABC Fence Co.), Estimated dates (Nov 23, 2026 – Dec 23, 2026), Submitted (Sep 14, 2026), Review deadline (Oct 14, 2026), and the request text 'Replace rear chain-link with 6 ft cedar privacy fence.' The 'Record decision' panel includes a 'Status' dropdown set to 'Approved with conditions', a 'Conditions' text area with the text 'Fence must be stained natural cedar; finished side faces out.', a 'Decision notes' text area, a 'Decided on' date field set to '09/24/2026', and a 'Decided by' dropdown set to 'Architectural Review Committee'. A 'Save decision' button is at the bottom of this panel, and a 'Delete request' button is located below it.

An approved-with-conditions request with the decision panel

1. Open the request.
2. In **Record decision**, choose the **Status**.
3. For **Approved with conditions**, enter the **Conditions**, for example "Fence must be stained natural cedar". They're required.
4. For **Denied**, explain the reason in **Decision notes**. They're required.
5. Check **Decided on** and **Decided by** (for example "Architectural Review Committee").
6. Click **Save decision**.

The **Decision** card then shows the outcome, date, decider and conditions. For a request from the HOA portal, the decision is sent to the portal so the owner can see it.

Meetings

Meetings keeps each association's calendar of board, annual, special, budget and committee meetings, with agendas, notices, minutes and quorum. The **Upcoming** and **Past** tabs split the list.

The screenshot shows the 'Meetings' section of the 'Demo Management HOA Manager' interface. On the left is a dark sidebar with navigation links: Dashboard, Associations, Deadlines & tasks (3), COMMUNITY (Units, Owners, Board members, Bylaws & governing docs, Amendments (6), Announcements), OPERATIONS (Work orders (2), Violations, Architectural review (4)), Meetings (selected), FINANCIALS (Receivables, Billing, Collections). The main area has a search bar and a '+ Schedule meeting' button. Below is a 'Meetings' header with a description and tabs for 'Upcoming' (7) and 'Past' (4). Filters for 'All associations', 'Any type', and a 'Filter' button are present. The list shows meetings for November and December 2026. Meetings are categorized as 'From HOA portal' (blue) or 'On HOA portal' (green), and their status is 'Scheduled' (blue) or 'Notice sent' (orange).

Month	Date	Meeting Title	Time	Location	Source	Status
November 2026	NOV 2	Fall social committee planning	Mon 7:00 PM	Board meeting · Oak Ridge HOA · Clubhouse	From HOA portal	Scheduled
November 2026	NOV 5	November board meeting	Thu 6:30 PM	Board meeting · Oak Ridge HOA · Clubhouse	On HOA portal	Notice sent
November 2026	NOV 5	November board meeting	Thu 6:30 PM	Board meeting · Willow Creek Condominiums · Clubhouse		Notice sent
November 2026	NOV 19	Budget workshop for 2027	Thu 6:00 PM	Budget meeting · Oak Ridge HOA · Clubhouse		Scheduled
November 2026	NOV 19	Budget workshop for 2027	Thu 6:00 PM	Budget meeting · Willow Creek Condominiums · Clubhouse		Scheduled
December 2026	DEC 24	Annual owners meeting and election	Thu 7:00 PM	Annual meeting · Oak Ridge HOA · Community center		Scheduled
December 2026	DEC 24	Annual owners meeting and election	Thu 7:00 PM	Annual meeting · Willow Creek Condominiums · Community center		Scheduled

The meetings list with upcoming board, budget and annual meetings

Meetings marked **On HOA portal** have been published to the association's Neighborhood app calendar. Meetings the HOA adds to its own calendar appear here marked **From HOA portal**.

How to schedule a meeting

1. Go to **Meetings** and click **Schedule meeting**.
2. Choose the **Association** and the **Type** (board, annual, special, budget or committee).
3. Enter the **Title**, **Starts** and **Ends** times, **Location** and, for hybrid or online meetings, the **Video link**.
4. Write the **Agenda**, one item per line, for example "1. Call to order", "2. Approval of prior minutes".

5. Enter the **Quorum required**: the number of members (or directors) needed to conduct business.
6. Choose the **Status**. Pick **Notice sent** once you've sent the meeting notice; HOA Manager records when.
7. Click **Schedule meeting**.

How to publish a meeting to the HOA portal

1. Open the meeting.
2. In the **HOA portal** card, click **Publish to HOA portal**.

The meeting is added to the HOA's Neighborhood app calendar. Board, budget and committee meetings are shown to board members; annual and special meetings are shown to all owners. If you later change a published meeting's time, place, agenda or title, the portal is updated automatically; use **Send again** to resend it yourself.

The **HOA portal** card tells you when the association isn't connected yet, and doesn't offer publishing for cancelled meetings or for meetings that came from the portal (they're already on its calendar).

How to cancel a meeting

1. Open the meeting and use **Cancel meeting**.
2. Enter a **Reason** if you like, and confirm.

If the meeting was published to the HOA portal, it's cancelled there too, with your reason.

How to record minutes, attendance and quorum

The screenshot displays the 'Demo Management HOA Manager' interface. The left sidebar contains navigation menus for 'Working in' (All associations (3)), 'COMMUNITY' (Units, Owners, Board members, Bylaws & governing docs, Amendments (6), Announcements), 'OPERATIONS' (Work orders (2), Violations, Architectural review (4), Meetings), 'FINANCIALS' (Receivables, Billing, Collections, Payables (4), Budgets, Banking & GL, Reports), and 'RECORDS' (Vendors, Contracts, Insurance, Reserve studies, Resale & estoppel, Documents). The main content area shows the 'September board meeting' for 'Oak Ridge HOA'. It includes tabs for 'Held', 'Agenda', 'Minutes', and 'Edit'. The 'Details' section lists: When (Sep 24, 2026 6:30 PM - 8:00 PM), Location (Clubhouse), Video link (—), Notice sent (Sep 14, 2026 3:20 AM), Quorum (3 required · 5 attended · Quorum met), and Minutes approved (Oct 21, 2026). The 'Agenda' section lists 7 items: 1. Call to order and quorum, 2. Approve minutes of the prior meeting, 3. Treasurer's report and delinquencies, 4. Manager's report: work orders and vendor contracts, 5. Architectural review decisions, 6. Open forum, 7. Adjourn. The 'Minutes' section contains a text area with the following text: 'Present: all five directors and the community manager. The treasurer reported operating cash in line with budget and three delinquent accounts. Motion to approve the landscaping renewal passed 5-0. Adjourned at 7:52 PM.' Below the text area are fields for 'Attendance' (5) and 'Minutes approved on' (10/21/2026). A 'Quorum is 3.' label is present. A checkbox 'Meeting was held' is checked. A 'Save minutes' button is at the bottom right. An 'HOA portal' section on the right offers to 'Publish to HOA portal' and a 'Delete meeting' link.

A held board meeting with agenda, minutes, attendance and quorum met

1. Open the meeting after it has taken place.
2. In **Minutes**, type or paste the minutes.
3. Enter the **Attendance** count. With a quorum set, the page shows **Quorum met** or **No quorum**.
4. When the board approves the minutes, enter the **Minutes approved on** date.
5. Tick **Meeting was held**.
6. Click **Save minutes**.

How to print the agenda or minutes

Click **Agenda** at the top of the meeting page to open a print-ready agenda for the meeting packet. Once minutes are recorded, **Minutes** opens print-ready minutes. Use your browser's print command to print them or save them as PDF.

Financials

The **Financials** section of the sidebar holds each association's money: what owners are billed and pay, what vendors are owed and paid, and the budget everything is measured against. Each association keeps its own books, split into an **operating fund** for day-to-day costs and a **reserve fund** for long-term repairs and replacements.

Area	What it's for
Receivables	What every owner owes, aged by how long it's been unpaid; posting payments; owner statements.
Billing	Assessment schedules (regular dues, special assessments, fees) and billing runs.
Collections	Delinquent accounts moving through reminders, demand letters, liens and payment plans.
Payables	Vendor invoices from entry through approval and payment.
Budgets	Annual operating and reserve budgets, and budget vs actual.
Banking & GL	Bank accounts, reconciliation and the chart of accounts.
Reports	Income statement, budget vs actual, aging, cash receipts and management fees.

Who can do what: anyone with access to an association can view its financials. Posting entries, running billing and late fees, budgets, bank and GL accounts, collections, and entering or paying invoices need a financial role: **Owner**, **Administrator** or **Accountant**. Approving or rejecting invoices needs the invoice-approval permission, which Owners, Administrators, Community Managers and Accountants have.

How the numbers fit together

- **Charges** (assessments, special assessments, late fees, fines) increase what an owner owes. **Payments** and **credits** reduce it. A unit's balance is the sum of its ledger.

- Payments always apply to the **oldest charges first**. This is how aging works: a payment pays off last July before it pays this month.
- Payments owners make online in the HOA's Neighborhood app arrive automatically as **Payment via neighborhood portal** entries.
- Income in reports comes from charges and late fees posted to the ledger; expenses come from vendor invoices that are approved or paid.

Banking and the chart of accounts

Banking & GL has two tabs: **Bank accounts** and **Chart of accounts**.

The chart of accounts

Every new association starts with a standard HOA chart of accounts, so most associations never need to change it. It includes:

- **Assets** — 1000 Operating Cash, 1050 Reserve Cash, 1100 Accounts Receivable - Owners, 1200 Prepaid Expenses.
- **Liabilities and equity** — 2000 Accounts Payable, 2100 Prepaid Assessments, 3000 Operating Fund Balance, 3100 Reserve Fund Balance.
- **Income** — 4000 Assessment Income, 4050 Special Assessment Income, 4100 Late Fee Income, 4200 Interest Income, 4300 Violation Fine Income, 4400 Amenity & Other Income, and in the reserve fund 4600 Reserve Contributions and 4700 Reserve Interest Income.
- **Expenses** — 5000 Management Fees through 5950 Bad Debt (administration, legal, insurance, utilities, landscaping, pool, repairs, security, taxes), and 6000 Reserve Expenditures in the reserve fund.

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Find an association, owner, address, work order...

OO

Banking & GL

Each association's chart of accounts, split into operating and reserve funds.

[Bank accounts](#)
[Chart of accounts](#)

Any type

Any fund

Active accounts

Filter

NUMBER	NAME	TYPE	FUND	STATUS	
1000	Operating Cash	Asset	Operating	Active	Deactivate
1050	Reserve Cash	Asset	Reserve	Active	Deactivate
1100	Accounts Receivable - Owners	Asset	Operating	Active	Deactivate
1200	Prepaid Expenses	Asset	Operating	Active	Deactivate
2000	Accounts Payable	Liability	Operating	Active	Deactivate
2100	Prepaid Assessments	Liability	Operating	Active	Deactivate
3000	Operating Fund Balance	Equity	Operating	Active	Deactivate
3100	Reserve Fund Balance	Equity	Reserve	Active	Deactivate
4000	Assessment Income	Income	Operating	Active	Deactivate
4050	Special Assessment Income	Income	Operating	Active	Deactivate
4100	Late Fee Income	Income	Operating	Active	Deactivate
4200	Interest Income	Income	Operating	Active	Deactivate
4300	Violation Fine Income	Income	Operating	Active	Deactivate
4400	Amenity & Other Income	Income	Operating	Active	Deactivate
4600	Reserve Contributions	Income	Reserve	Active	Deactivate

[+ Add GL account](#)

The chart of accounts for Oak Ridge HOA, split into operating and reserve funds

How to add or change a GL account

1. Go to **Banking & GL** and open the **Chart of accounts** tab.
2. Click **Add GL account**, or click an existing account to edit it.
3. Choose the **Association**, and enter the **Number** (unique within the association) and **Name**.
4. Choose the **Type** (asset, liability, equity, income or expense) and the **Fund** (operating or reserve).
5. Click **Add GL account** or **Save changes**.

To retire an account, click **Deactivate**. Inactive accounts disappear from pick lists but keep their history; **Reactivate** brings one back. Use the filters to show inactive accounts or narrow by type or fund.

Bank accounts

The **Bank accounts** tab lists each association's operating and reserve accounts with their book balance and when they were last reconciled.

The screenshot shows the 'Banking & GL' section of a software interface for 'Oak Ridge HOA'. The left sidebar contains navigation links for Dashboard, Associations, Deadlines & tasks, COMMUNITY (Units, Owners, Board members, Bylaws & governing docs, Amendments, Announcements), OPERATIONS (Work orders, Violations, Architectural review, Meetings), and FINANCIALS. The main content area is titled 'Banking & GL' and includes a search bar, a '+ Add bank account' button, and tabs for 'Bank accounts' and 'Chart of accounts'. Below these is a table of active accounts with columns: ACCOUNT, FUND, GL ACCOUNT, OPENING, BOOK BALANCE, and LAST RECONCILED. Two accounts are listed: 'Operating Checking' (First Peach Bank, Operating, 1000 - Operating Cash) and 'Reserve Money Market' (First Peach Bank, Reserve, 1050 - Reserve Cash). Each account row includes a 'Statement \$' field, a date field, and a 'Reconcile' button. A note at the bottom explains the book balance calculation.

ACCOUNT	FUND	GL ACCOUNT	OPENING	BOOK BALANCE	LAST RECONCILED
Operating Checking First Peach Bank ---5156	Operating	1000 - Operating Cash	\$21,600.00 Apr 1, 2026	\$48,990.00 +\$44,715.00 in - -\$17,325.00 out	Sep 30, 2026 Statement \$29,280.00 - diff -\$19,710.00
Reserve Money Market First Peach Bank ---6821	Reserve	1050 - Reserve Cash	\$86,400.00 Apr 1, 2026	\$86,400.00 +\$0.00 in - -\$0.00 out	Never

Book balance = opening balance + owner payments received (deposited to the first active account of the fund) - vendor invoices paid from the account, since the opening balance date.

Bank accounts for Oak Ridge HOA with book balances and the reconcile form

The **Book balance** is the opening balance, plus owner payments received into that fund, minus vendor invoices paid from the account.

How to add a bank account

1. Go to **Banking & GL** and click **Add bank account**.
2. Choose the **Association** and enter the **Account name** (for example "Operating checking"), **Bank** and **Last 4 digits**.
3. Choose the **Fund** and the **GL cash account**, an asset account such as 1000 Operating Cash.
4. Enter the **Opening balance (\$)** and **Opening balance date**.
5. Click **Add bank account**.

How to reconcile a bank account

1. When the bank statement arrives, go to **Banking & GL**.
2. On the account's row, enter the statement's ending balance in **Statement \$** and the **Statement date**.

3. Click **Reconcile**.

HOA Manager records the statement balance and the reconciliation date, so you can compare the statement to the book balance and see at a glance which accounts haven't been reconciled recently.

Tip: an account with paid invoices can't be deleted; deleting it deactivates it instead, so payment history keeps its bank account.

Budgets

Budgets holds each association's annual operating and reserve budget. The list shows each budget's fiscal year, status, budgeted income, expenses and net, with a link to **Budget vs actual**.

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HOA Manager

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Budgets

Annual operating and reserve budgets, from draft to board approval.

+ New budget

Any status Filter

BUDGET	ASSOCIATION	FISCAL YEAR	STATUS	INCOME	EXPENSES	NET	
Operating & reserve budget	Oak Ridge HOA	FY2027	Draft	\$115,380.00	\$101,550.00	\$13,830.00	Budget vs actual
Operating & reserve budget	Willow Creek Condominiums	FY2027	Draft	\$104,390.00	\$93,310.00	\$11,080.00	Budget vs actual
Operating & reserve budget	Oak Ridge HOA	FY2026	Approved	\$110,940.00	\$97,640.00	\$13,300.00	Budget vs actual
Operating & reserve budget	Willow Creek Condominiums	FY2026	Approved	\$100,380.00	\$89,720.00	\$10,660.00	Budget vs actual

The budget list with fiscal years, statuses and totals

A budget moves through three statuses:

Status	Meaning
Draft	Being prepared. Lines can be edited.
Proposed	Sent to the board for review. Lines can still be edited.

Status	Meaning
Approved	Adopted by the board. Locked: lines can no longer change.

How to create a budget

1. Go to **Budgets** and click **New budget**.
2. Choose the **Association** and the **Fiscal year** (the calendar year the fiscal year starts in), and give it a **Name**, for example "Operating & reserve budget".
3. To start from last year's numbers, choose a budget in **Copy lines from** and enter a percentage in **Increase every line by (%)**. Leave it on **Start blank** to begin from zero.
4. Add any **Notes** and click **Create budget**.

How to enter budget lines

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Budgets / FY2026

FY2026 · Operating & reserve budget
Oak Ridge HOA · fiscal year Jan 1, 2026 – Dec 31, 2026

Approved

Budget vs actual

Back to draft

Budgeted income
\$110,940

Budgeted expenses
\$97,640

Net
\$13,300
Surplus or balanced

Suggested assessment per unit
\$166.91
Monthly - 48 units - current \$165.00

Suggested assessment = (operating expenses \$97,640.00 – non-assessment operating income \$1,500.00) ÷ 48 units ÷ 12 periods per year.

Income · Operating fund

ACCOUNT	ANNUAL AMOUNT	PER MONTH	NOTES
4000 · Assessment Income	\$95,040.00	\$7,920.00	
4050 · Special Assessment Income	\$0.00	\$0.00	
4100 · Late Fee Income	\$1,200.00	\$100.00	
4200 · Interest Income	\$300.00	\$25.00	
4300 · Violation Fine Income	\$0.00	\$0.00	
4400 · Amenity & Other Income	\$0.00	\$0.00	
Total income · operating	\$96,540.00	\$8,045.00	

Income · Reserve fund

ACCOUNT	ANNUAL AMOUNT	PER MONTH	NOTES
4600 · Reserve Contributions	\$14,400.00	\$1,200.00	
4700 · Reserve Interest Income	\$0.00	\$0.00	
Total income · reserve	\$14,400.00	\$1,200.00	

Expenses · Operating fund

ACCOUNT	ANNUAL AMOUNT	PER MONTH	NOTES
5000 · Management Fees	\$8,060.00	\$671.67	
5100 · Administrative & Office	\$2,400.00	\$200.00	
5200 · Legal & Professional	\$3,500.00	\$291.67	
5300 · Insurance	\$10,080.00	\$840.00	
5400 · Utilities - Electric	\$4,800.00	\$400.00	
5410 · Utilities - Water & Sewer	\$6,200.00	\$516.67	
5500 · Landscaping	\$36,000.00	\$3,000.00	

An approved budget with income and expense lines by fund and the suggested assessment

1. Open the budget. Lines are grouped into income and expenses for each fund, one row per GL account.
2. Enter the **Annual amount** for each account. The **Per month** column shows one twelfth of it.
3. Add **Notes** to any line, for example "3-year landscaping contract, year 2".
4. Click **Save budget**.

The cards at the top show **Budgeted income**, **Budgeted expenses**, **Net** (surplus or deficit) and the **Suggested assessment per unit**:

Suggested assessment = (operating expenses – operating income other than assessments)
÷ number of units ÷ assessment periods per year.

The card compares the suggestion with the association's current assessment, which makes it easy to show the board whether dues need to change.

How to take a budget to the board and approve it

1. When the draft is ready, click **Propose to board**.
2. After the board adopts it, click **Mark approved** and confirm. The budget is now locked.
3. If the board asks for changes after approval, click **Back to draft**, edit the lines, and approve again.

How to compare budget to actual

Click **Budget vs actual** on a budget (or in the list) to see, for every income and expense account:

- **Budget** and **Actual** for the fiscal year so far,
- **Variance** (positive is favorable: more income or less expense than budgeted), and
- **% used**.

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Budgets / FY2026 / Budget vs actual
Budget vs actual · FY2026
 Oak Ridge HOA · Operating & reserve budget · Jan 1, 2026 – Dec 31, 2026

Actual income
\$47,995
 of \$110,940 budgeted

Actual expenses
\$19,050
 of \$97,640 budgeted

Net (actual)
\$28,945
 Budgeted \$13,300

Print

Income

ACCOUNT	FUND	BUDGET	ACTUAL	VARIANCE	% USED
4000 · Assessment Income	Operating	\$95,040.00	\$47,520.00	-\$47,520.00	50.0%
4100 · Late Fee Income	Operating	\$1,200.00	\$425.00	-\$775.00	35.4%
4200 · Interest Income	Operating	\$300.00	\$0.00	-\$300.00	0.0%
4300 · Violation Fine Income	Operating	\$0.00	\$50.00	\$50.00	—
4600 · Reserve Contributions	Reserve	\$14,400.00	\$0.00	-\$14,400.00	0.0%
Total income		\$110,940.00	\$47,995.00	-\$62,945.00	43.3%

Expenses

ACCOUNT	FUND	BUDGET	ACTUAL	VARIANCE	% USED
5000 · Management Fees	Operating	\$8,060.00	\$0.00	\$8,060.00	0.0%
5100 · Administrative & Office	Operating	\$2,400.00	\$0.00	\$2,400.00	0.0%
5200 · Legal & Professional	Operating	\$3,500.00	\$1,375.00	\$2,125.00	39.3%
5300 · Insurance	Operating	\$10,080.00	\$0.00	\$10,080.00	0.0%
5400 · Utilities - Electric	Operating	\$4,800.00	\$0.00	\$4,800.00	0.0%
5410 · Utilities - Water & Sewer	Operating	\$6,200.00	\$0.00	\$6,200.00	0.0%
5500 · Landscaping	Operating	\$36,000.00	\$15,000.00	\$21,000.00	41.7%
5600 · Pool & Amenities	Operating	\$14,000.00	\$0.00	\$14,000.00	0.0%
5700 · Repairs & Maintenance	Operating	\$12,000.00	\$2,675.00	\$9,325.00	22.3%
5900 · Taxes & Licenses	Operating	\$600.00	\$0.00	\$600.00	0.0%
6000 · Reserve Expenditures	Reserve	\$0.00	\$0.00	\$0.00	—
Total expenses		\$97,640.00	\$19,050.00	\$78,590.00	19.5%

Budget vs actual by GL account with variance and percent used

The cards at the top give **Actual income**, **Actual expenses** and **Net (actual)**. Click **Print** for a board-packet copy.

Billing owners

Billing is where you set up what owners are charged and when. Each **assessment schedule** describes one recurring (or one-time) charge; a **billing run** posts that charge to every unit for one period.

Billing
Recurring assessment schedules and billing runs. Re-running a period never double-bills.

[+ Add schedule](#)

Run billing

All due schedules of...
or
One schedule

October 2026 [Preview](#)

Scheduled runs post automatically each day for schedules whose next run date has arrived. Use this to bill a period by hand; you'll see the unit count and total before anything posts.

Assessment schedules

Active schedules [Filter](#)

SCHEDULE	ASSOCIATION	FREQUENCY	AMOUNT	GL ACCOUNT	DUE DAY	NEXT RUN	LAST RUN
Monthly assessment Regular assessment	Oak Ridge HOA	Monthly	Per-unit amount default \$165.00	4000 - Assessment Income	1	Nov 1, 2026	Oct 24, 2026

Billing with the run-billing panel and assessment schedules

How to set up an assessment schedule

1. Go to **Billing** and click **Add schedule**.
2. Choose the **Association** and give the schedule a **Name**, for example "Monthly assessment".
3. Choose the **Kind**: Regular assessment, Special assessment or Fee.
4. Choose the **Frequency**: Monthly, Quarterly, Semi-annual, Annual or One time.
5. Enter the **Amount per unit (\$)**, or leave it blank to bill each unit its own assessment amount (the unit's override, or else the association's default). Leave it blank for regular dues so per-unit overrides are respected.
6. Choose the **Income GL account**, or leave it blank to use 4000 Assessment Income (4050 for special assessments).
7. Enter the **Due day of month**, the **Start date** and, for a schedule that ends, the **End date**.
8. Check the **Next run date**. It defaults to the start date; the daily billing run posts the period of this date.
9. Click **Add schedule**.

Special assessments

For a one-time special assessment, choose **Kind: Special assessment**, **Frequency: One time** and the **Amount per unit (\$)**. After it runs once, the schedule is marked inactive automatically. For a

special assessment payable in installments, use a monthly or quarterly frequency with an **End date**.

Automatic billing

Every day, HOA Manager runs each active schedule whose **Next run date** has arrived. It posts the charges and moves the next run date forward by the schedule's frequency. If a run was missed, the next one catches up on the missed periods. The **Recent billing runs** list on the Billing page shows each run's period, how many charges were posted and the total.

How to preview and run billing by hand

Use this to bill a period early, or to bill a new schedule immediately.

1. On **Billing**, in **Run billing**, choose either **All due schedules of...** an association, or **One schedule**.
2. Choose the month to bill and click **Preview**.
3. The preview shows, for each schedule, the number of **Units**, how many are **Already billed**, the **Charges to post** and the **Total**. Nothing has been posted yet.

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Billing / Preview
Preview billing · November 2026
Nothing has been posted yet.

Charges to post: **48**
Total: **\$7,920.00**
Already billed: **0**
Skipped, so re-running is safe

SCHEDULE	ASSOCIATION	DUE DATE	UNITS	TO POST	ALREADY BILLED	TOTAL
Monthly assessment Per-unit amount	Oak Ridge HOA	Nov 1, 2026	48	48	0	\$7,920.00

Cancel **Post 48 charge(s)**

The billing preview showing charges to post for one period

4. Check the numbers and click **Post N charge(s)**. Confirm when asked.

Important: re-running a period never double-bills. A unit that already has a charge for that schedule and period is skipped, so it's always safe to run billing again.

Charges are dated the first of the period and are due on the schedule's due day. Each charge is linked to the unit's primary owner.

Late fees

Each association's late fee is set on the association (see *Associations*): the **Late fee** amount and a **grace period** in days.

- A charge that is still unpaid (after payments are applied oldest-first) more than the grace period after its due date gets one late fee for its billing period, posted to 4100 Late Fee Income.

- A unit is never charged a second late fee for the same period, so the run is safe to repeat.

Late fees are applied automatically every day. To apply them right away for one association:

1. Pick the association in the sidebar's **Working in** switcher.
2. Go to **Receivables** and click **Apply late fees**.
3. Confirm. HOA Manager tells you how many late fees it added and the total.

The button only appears when an association is selected and it has a late fee set.

Receivables

Receivables lists every unit with a balance, and ages each balance into **Current**, **1–30 days**, **31–60 days**, **61–90 days** and **90+ days**. The cards at the top show the **Total owed**, how much is **Past due** (and how many units are delinquent), and the amount **Over 90 days**.

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Receivables

Owner balances with FIFO aging: payments apply to the oldest charges first.

Total owed
\$3,280
 9 units with a balance

Past due
\$2,855
 9 delinquent units

Over 90 days
\$495

☐ Only delinquent
 Min balance \$
 Filter

UNIT	OWNER	CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	90+ DAYS	BALANCE	COLLECTIONS
104 Maple Dr	Tod Gibson	\$25.00	\$165.00	—	—	—	\$190.00	Start case
116 Hickory Trl	Amanda Marvin	\$100.00	\$165.00	\$165.00	\$165.00	\$165.00	\$760.00	Open case
120 Magnolia Pl	Dominique McDermott	—	\$50.00	—	—	—	\$50.00	Start case
132 Birch Ct	Verna Schmitt	\$100.00	\$165.00	\$165.00	\$165.00	\$165.00	\$760.00	Open case
148 Oak Ln	Mattie O'Connell	\$25.00	\$165.00	—	—	—	\$190.00	Start case
164 Hickory Trl	Marlin Kiehn	\$100.00	\$165.00	\$165.00	\$165.00	\$165.00	\$760.00	Start case
192 Magnolia Pl	Eudora Rath	\$25.00	\$165.00	—	—	—	\$190.00	Start case
236 Hickory Trl	Idell Simonis	\$25.00	\$165.00	—	—	—	\$190.00	Start case
280 Cedar Way	Reva Jones	\$25.00	\$165.00	—	—	—	\$190.00	Start case
Total (9 units)		\$425.00	\$1,370.00	\$495.00	\$495.00	\$495.00	\$3,280.00	

Receivables for Oak Ridge HOA with aging buckets and collection status

Tick **Only delinquent** to hide units that are current, or enter a **Minimum balance**. The **Collections** column shows whether a unit has an **Open case** or lets you **Start case**. Click **Aging report** for a printable version.

The unit ledger

Click a unit to open its ledger: every charge, late fee, payment and credit, with a running balance, the aging buckets, and forms to post new entries.

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116 Hickory Trl

Unit record

Owner statement

Open collection case

In collections since Aug 10, 2026 — Notice of intent to lien View case

Balance

Current

1-30 days

31-60 days

61-90 days

90+ days

Ledger

DATE	DESCRIPTION	TYPE	AMOUNT	BALANCE
Oct 24, 2026 due Oct 24, 2026	Late fee — October 2026 Late fee run · 4100 · Olivia Owner	Late fee	\$25.00	\$760.00
Oct 24, 2026 due Oct 24, 2026	Late fee — September 2026 Late fee run · 4100 · Olivia Owner	Late fee	\$25.00	\$735.00
Oct 24, 2026 due Oct 24, 2026	Late fee — August 2026 Late fee run · 4100 · Olivia Owner	Late fee	\$25.00	\$710.00
Oct 24, 2026 due Oct 24, 2026	Late fee — July 2026 Late fee run · 4100 · Olivia Owner	Late fee	\$25.00	\$685.00
Oct 1, 2026 due Oct 1, 2026	Monthly assessment — October 2026 Billing run · 4000 · Olivia Owner	Charge	\$165.00	\$660.00
Sep 1, 2026 due Sep 1, 2026	Monthly assessment — September 2026 Billing run · 4000 · Olivia Owner	Charge	\$165.00	\$495.00
Aug 1, 2026 due Aug 1, 2026	Monthly assessment — August 2026 Billing run · 4000 · Olivia Owner	Charge	\$165.00	\$330.00
Jul 1, 2026 due Jul 1, 2026	Monthly assessment — July 2026 Billing run · 4000 · Olivia Owner	Charge	\$165.00	\$165.00
Payment via neighborhood portal				

Post payment

Amount received *

Date *

Method *

Reference / check #

GL account

Description

Post payment

Post credit

Credit amount *

Date *

GL account

Description

A unit ledger with aging, the collections banner and the post-payment form

Each entry shows its date and due date, description, how it was created (billing run, late fee run, manual, Neighborhood app), the GL account and who posted it. When the unit is in collections, a banner shows the case stage with a link to it.

How to post a payment

1. Open the unit's ledger from **Receivables**.
2. In **Post payment**, enter the **Amount received** and the **Date**.
3. Choose the **Method** (check, ACH, card, cash, online, lockbox or other) and enter the **Reference / check #**.
4. Optionally choose a **GL account** and add a **Description**.
5. Click **Post payment**.

The payment applies to the oldest charges first and the aging updates immediately.

How to post a credit, charge or adjustment

The ledger page also has forms for:

- **Post credit** — reduces the balance, for example a waived late fee or a refund owed to the owner.
- **Post charge** — adds a one-off charge, for example a key fob fee or a chargeback.
- **Post adjustment** — corrects the balance in either direction. Enter a positive amount to raise the balance or a negative amount to lower it.

Each form takes an amount, date, optional GL account and description.

How to void a manual entry

Entries you posted by hand can be voided if they were entered in error:

1. Find the entry in the ledger and click **Void**.
2. Confirm. The entry is removed from the ledger.

Charges from billing runs and late fee runs, and payments from the Neighborhood app, can't be voided. Post a credit or an adjustment instead, so the audit trail stays complete.

How to print or email an owner statement

1. On the unit's ledger, click **Owner statement**.
2. Choose the **From** and **To** dates and click **Update**. The statement shows the balance forward, every charge, payment and credit in the period, and the **Total due**.

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Receiveables / 116 Hickory Trl / Statement

Owner statement

116 Hickory Trl

Print

From 07/01/2026 To 10/24/2026 Update

Email this statement

Oak Ridge Homeowners Association, Inc.

Managed by Demo Management

100 Oak Ridge Pkwy, Macon, GA 31210

office@demo-management.test (478) 555-0100

Owner

Amanda Marvin

116 Hickory Trl

Property: 116 Hickory Trl

Statement

Jul 1, 2026 – Oct 24, 2026

Issued Oct 24, 2026

Balance due

\$760.00

DATE	DESCRIPTION	CHARGES	PAYMENTS & CREDITS	BALANCE
Jul 1, 2026	Balance forward			\$0.00
Jul 1, 2026	Monthly assessment — July 2026	\$165.00		\$165.00
Aug 1, 2026	Monthly assessment — August 2026	\$165.00		\$330.00
Sep 1, 2026	Monthly assessment — September 2026	\$165.00		\$495.00
Oct 1, 2026	Monthly assessment — October 2026	\$165.00		\$660.00
Oct 24, 2026	Late fee — July 2026	\$25.00		\$685.00
Oct 24, 2026	Late fee — August 2026	\$25.00		\$710.00
Oct 24, 2026	Late fee — September 2026	\$25.00		\$735.00
Oct 24, 2026	Late fee — October 2026	\$25.00		\$760.00
Balance as of Oct 24, 2026				\$760.00

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	90+ DAYS	TOTAL DUE
\$100.00	\$165.00	\$165.00	\$165.00	\$165.00	\$760.00

Please include your property address with your payment. Questions about this statement? Contact Demo Management at office@demo-management.test.

An owner statement ready to print or email

3. To print it, click **Print**. The sidebar is hidden on paper.
4. To email it, open **Email this statement**, check the **Send to** address (the owner's email is filled in), add an optional **Note to include** and click **Send statement**.

Statements are sent from your company's email address (see *Email sending in Company setup*).

Collections

Collections tracks delinquent accounts through your collection policy, from a courtesy reminder to an attorney referral. The list shows each case's unit, stage, balance at open, current balance, days open and next action date. An **Overdue** badge appears when the next action date has passed.

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Collections

Delinquent accounts moving through reminders, demand letters, liens and payment plans.

Delinquent units

Open

Closed

All

Any stage

Filter

UNIT	ASSOCIATION	STAGE	AT OPEN	CURRENT BALANCE	DAYS OPEN	NEXT ACTION
116 Hickory Trl Amanda Marvin	Oak Ridge HOA	Notice of intent to lien	\$760.00	\$760.00	75	Oct 22, 2026 Overdue
#104 - 2200 Willow Creek Dr Justyn Nader	Willow Creek Condominiums	Notice of intent to lien	\$2,205.00	\$2,205.00	75	Oct 22, 2026 Overdue
132 Birch Ct Verna Schmitt	Oak Ridge HOA	Late notice	\$760.00	\$760.00	75	Nov 3, 2026
#108 - 2200 Willow Creek Dr Enrique Feest	Willow Creek Condominiums	Late notice	\$2,340.00	\$2,340.00	75	Nov 3, 2026

Collection cases with their stage, balances and next action dates

Collection stages

Stage	Typical action
Courtesy reminder	A friendly reminder that a payment was missed.
Late notice	Formal notice that the account is late, with late fees.
Demand letter	Demand for payment by a deadline.
Notice of intent to lien	Notice that a lien will be filed if the balance isn't paid.
Lien filed	A lien has been recorded against the property.
Referred to attorney	The account is with the association's attorney.

Stage	Typical action
Payment plan	The owner is paying the balance in installments.
Closed	The case is resolved.

Important: state law and each association's collection policy set the notices and waiting periods required before each step. Check them before advancing a case, especially before a lien or attorney referral.

How to open a collection case

1. On **Receivables**, click **Start case** on the unit's row, or click **Start collection case** on the unit's ledger.
2. Choose the **Starting stage**, set the **Next action date** and add **Notes**. The **Balance at open** is filled in from the ledger.
3. Click **Open case**.

A unit can only have one open case at a time.

How to record an action or advance the stage

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Collections / 116 Hickory Trl

Collections · 116 Hickory Trl

Oak Ridge HOA · Amanda Marvin

• Notice of intent to lien Unit ledger

Balance at open \$760.00 Opened Aug 10, 2026	Current balance \$760.00	Past due \$660.00 90+ days \$165.00	Next action Oct 22, 2026 2 days overdue
---	------------------------------------	--	--

History

- Notice of intent to lien**
Oct 12, 2026 · Alex Accountant
Notice of intent to lien sent by certified mail and email.
- Demand letter**
Sep 14, 2026 · Alex Accountant
Demand letter sent by certified mail and email.
- Late notice**
Aug 25, 2026 · Alex Accountant
Late notice sent by certified mail and email.
- Courtesy reminder**
Aug 10, 2026 · Alex Accountant
Courtesy reminder sent by certified mail and email.

> Record action / advance stage

Stage *
Notice of intent to lien

Action date *
10/24/2026

Next action date
mm/dd/yyyy

Notes

Save action

Case details & payment plan

Next action date
10/22/2026

Attorney
Smith & Lowe, Attorneys

Payment plan installment (\$)

Number of installments

Notes

A collection case with its history and the record-action form

1. Open the case.
2. In **Record action / advance stage**, choose the **Stage**, the **Action date** and the **Next action date**, and describe what was done in **Notes** (for example "Demand letter sent by certified mail").
3. Click **Save action**.

Each action is added to the case **History**, so you have a dated record of every notice that was sent.

How to set up a payment plan

1. Open the case and go to **Case details & payment plan**.
2. Enter the **Payment plan installment (\$)** and the **Number of installments**, the **Attorney** if one is involved, and any **Notes**.
3. Click **Save details**.
4. Record an action with the stage **Payment plan**.

Post each installment as a payment on the unit ledger as it arrives.

How to close a case

When the balance is paid or the matter is otherwise resolved, open the case and click **Close case**. Closed cases stay on record; use the list's filter to see them.

Payables

Payables tracks vendor invoices from entry through approval and payment. The tabs show **Pending approval**, **Approved**, **Rejected**, **Paid**, **Void** and **All**, with counts and totals. An **Overdue** badge appears on unpaid invoices past their due date.

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Find an association, owner, address, work order...

OO

Payables
 Vendor invoices from entry through approval and payment.

[+ Enter invoice](#)

Pending approval · \$9,680 4
 Approved · \$3,450 2
 Rejected · \$1,700 2
 Paid · \$34,650 30
 Void · \$0 0
 All 38

VENDOR	ASSOCIATION	INVOICE #	GL ACCOUNT	INVOICE DATE	DUE	AMOUNT
Summit Roofing Co. Roof inspection and minor repairs (reserve)	Willow Creek Condominiums	INV-6293	6000 · Reserve Expenditures	Oct 13, 2026	Oct 31, 2026	\$4,200.00
Ace Plumbing & Drain Repair irrigation main break	Oak Ridge HOA	INV-8130	5700 · Repairs & Maintenance	Oct 14, 2026	Nov 2, 2026	\$640.00
Summit Roofing Co. Roof inspection and minor repairs (reserve)	Oak Ridge HOA	INV-7178	6000 · Reserve Expenditures	Oct 16, 2026	Nov 8, 2026	\$4,200.00
Ace Plumbing & Drain Repair irrigation main break	Willow Creek Condominiums	INV-0776	5700 · Repairs & Maintenance	Oct 20, 2026	Nov 12, 2026	\$640.00
Total						\$9,680.00

Payables with invoices awaiting approval

How to enter a vendor invoice

1. Go to **Payables** and click **Enter invoice** (or click **Enter vendor invoice** on a work order).
2. Choose the **Association** and **Vendor**, and enter the **Invoice #**, **Invoice date**, **Due date** and **Amount (\$)**.
3. Choose the **Expense GL account**. It must belong to the selected association.
4. Link the **Work order** the invoice is for, if any.
5. Add a **Description** and **Notes**, and attach the **Invoice file (PDF or image)**.
6. Click **Submit for approval**.

How to approve or reject an invoice

The screenshot shows the 'Demo Management HOA Manager' interface. On the left is a dark sidebar with navigation links: Dashboard, Associations, Deadlines & tasks (3), COMMUNITY (Units, Owners, Board members, Bylaws & governing docs, Amendments (6), Announcements), OPERATIONS (Work orders (2), Violations, Architectural review (4), Meetings), FINANCIALS (Receivables, Billing, Collections, Payables (4), Budgets, Banking & GL, Reports). The main area has a search bar and a breadcrumb 'Payables / INV-8130'. The title is 'Ace Plumbing & Drain · #INV-8130' with a subtitle 'Oak Ridge HOA · \$640.00'. There are buttons for 'Pending approval' (yellow), 'Edit' (blue), and 'Void' (grey). Below the title is an 'Invoice' section with details: Vendor (Ace Plumbing & Drain), Association (Oak Ridge HOA), Invoice # (INV-8130), Amount (\$640.00), GL account (5700 - Repairs & Maintenance), Invoice date (Oct 14, 2026), Due (Nov 2, 2026), Description (Repair irrigation main break), Work order (—), Attachment (—), and Entered by (Alex Accountant · Oct 24, 2026 3:20 AM). To the right is an 'Approval' section with an 'Approve' button (blue), a 'Rejection reason' text input field, and a 'Reject' button (red).

An invoice pending approval with the approve and reject controls

1. Open the invoice from the **Pending approval** tab.
2. Check the details and the attached file (**Download invoice file**).
3. Click **Approve**, or enter a **Rejection reason** and click **Reject**.

Important: the person who entered an invoice can't approve it, unless they're an Owner or Administrator. The page tells them that another approver must approve it. This keeps a second pair of eyes on every payment.

How to record a payment to a vendor

1. Open an approved invoice.
2. In **Record payment**, choose the bank account it was **Paid from**, the **Paid on** date and the **Method**, and enter the **Check #** if paid by check.
3. Click **Mark paid**.

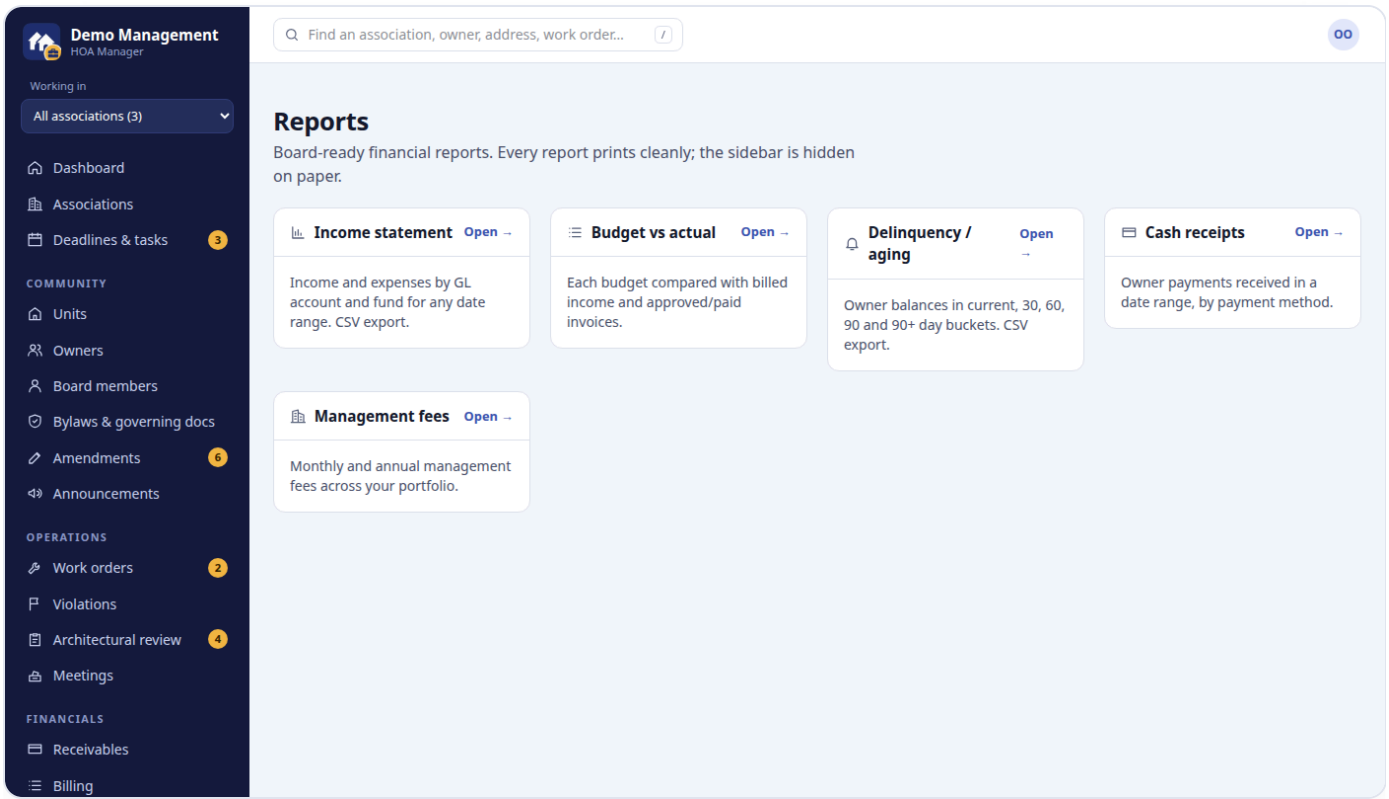
The invoice moves to the **Paid** tab and the bank account's book balance drops by the amount paid.

How to void an invoice

Click **Void** on the invoice and confirm, for example for a duplicate bill. Voided invoices stay on record but no longer count as expenses.

Reports

Reports collects the board-ready financial reports. Every report respects the sidebar's **Working in** association (or covers all of your associations), prints cleanly with **Print**, and some export to CSV for Excel.



The reports menu

Report	What it shows
Income statement	Income and expenses by GL account and fund for any date range, with net income. CSV export.

Report	What it shows
Budget vs actual	The budget vs actual comparison for a chosen budget.
Delinquency / aging	Owner balances in current, 1–30, 31–60, 61–90 and 90+ day buckets. CSV export.
Cash receipts	Payments received in a date range, by method, with totals. Online payments show as Online (Neighborhood app) .
Management fees	Fees owed to your company under each association's management agreement: basis (flat or per unit), rate, units, monthly and annual totals, and when each agreement ends.

How to run the income statement

1. Go to **Reports** and open **Income statement**.
2. Choose the **From** and **To** dates and, optionally, a **Fund**.
3. Review income and expenses by account. The bottom line shows net income.
4. Click **Print** for the board packet, or **CSV** to download the figures.

Working in

Oak Ridge HOA

Dashboard

Associations

Deadlines & tasks

COMMUNITY

Units

Owners

Board members

Bylaws & governing docs

Amendments

Announcements

OPERATIONS

Work orders

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Reports

RECORDS

Vendors

Contracts

Insurance

Reserve studies

Resale & estoppel

Documents

COMPANY

Find an association, owner, address, work order...

oo

Reports / Income statement

Income statement

Oak Ridge HOA · Jan 1, 2026 – Oct 24, 2026

CSV

Print

From 01/01/2026 To 10/24/2026 All funds Run

ACCOUNT	AMOUNT
OPERATING FUND	
Income	
4000 · Assessment Income	\$47,520.00
4100 · Late Fee Income	\$425.00
4300 · Violation Fine Income	\$50.00
Total income	\$47,995.00
Expenses	
5200 · Legal & Professional	\$1,375.00
5500 · Landscaping	\$15,000.00
5700 · Repairs & Maintenance	\$2,675.00
Total expenses	\$19,050.00
Net operating	\$28,945.00
Net income, all funds shown	\$28,945.00

Income is charges and late fees billed to owners (accrual, by entry date). Expenses are approved and paid vendor invoices by invoice date.

An income statement by fund and GL account

How to run the aging report

1. Open **Delinquency / aging** (or click **Aging report** on Receivables).
2. Optionally enter a **Minimum balance** to leave out small amounts.
3. Click **Print** or **CSV**.

Demo Management
 HOA Manager

Working in
Oak Ridge HOA

Dashboard

Associations

Deadlines & tasks 3

COMMUNITY

Units

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Board members

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Reports

Find an association, owner, address, work order...

OO

Reports / Aging

Delinquency & aging
 Oak Ridge HOA · as of Oct 24, 2026

☐ Only delinquent
 Min balance \$

ASSOCIATION	UNIT	OWNER	CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	90+ DAYS	BALANCE
Oak Ridge HOA	104 Maple Dr	Tod Gibson	\$25.00	\$165.00	—	—	—	\$190.00
Oak Ridge HOA	116 Hickory Trl	Amanda Marvin	\$100.00	\$165.00	\$165.00	\$165.00	\$165.00	\$760.00
Oak Ridge HOA	120 Magnolia Pl	Dominique McDermott	—	\$50.00	—	—	—	\$50.00
Oak Ridge HOA	132 Birch Ct	Verna Schmitt	\$100.00	\$165.00	\$165.00	\$165.00	\$165.00	\$760.00
Oak Ridge HOA	148 Oak Ln	Mattie O'Connell	\$25.00	\$165.00	—	—	—	\$190.00
Oak Ridge HOA	164 Hickory Trl	Marlin Kiehn	\$100.00	\$165.00	\$165.00	\$165.00	\$165.00	\$760.00
Oak Ridge HOA	192 Magnolia Pl	Eudora Rath	\$25.00	\$165.00	—	—	—	\$190.00
Oak Ridge HOA	236 Hickory Trl	Idell Simonis	\$25.00	\$165.00	—	—	—	\$190.00
Oak Ridge HOA	280 Cedar Way	Reva Jones	\$25.00	\$165.00	—	—	—	\$190.00
Total (9 units)			\$425.00	\$1,370.00	\$495.00	\$495.00	\$495.00	\$3,280.00

The delinquency and aging report

Tip: a typical monthly board package is the income statement for the month and year to date, budget vs actual, the aging report and the bank reconciliations. The compliance calendar reminds you each month (see *Deadlines and tasks*).

Records

The **Records** section of the sidebar holds the paperwork a management company must keep current for each association:

- **Vendors:** one company-wide directory, with insurance, license and W-9 compliance.
- **Contracts:** service agreements, with renewal-notice deadlines.
- **Insurance:** each association's policies and a coverage checklist.
- **Reserve studies:** the component inventory, percent funded and a 30-year projection.
- **Resale & estoppel:** certificate requests from title companies, lenders and buyers.
- **Documents:** the file library, including publishing files to an HOA's Neighborhood portal.

Most of these lists follow the **Working in** association switcher at the top of the sidebar. Choose one association to focus the list, or **All associations** to see your whole portfolio. Vendors are the exception: the directory is shared by every association your company manages.

Vendors

The vendor directory is company-wide. Add a vendor once and you can use them for work orders, invoices and contracts in any association.

Demo Management
HOA Manager

Working in

All associations (3)

Dashboard

Associations

Deadlines & tasks 3

COMMUNITY

Units

Owners

Board members

Bylaws & governing docs

Amendments 6

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Budgets

Find an association, owner, address, work order... 1

oo

Vendors

Your company-wide vendor directory, with insurance, license and W-9 compliance at a glance.

+ Add vendor

2 active vendors have a compliance issue (COI, license or W-9). [Review](#)

Search name, contact or email

Any category

Any status

Any compliance

Filter

VENDOR	CATEGORY	CONTACT	STATUS	COI EXPIRES	COMPLIANCE
Ace Plumbing & Drain ***	Plumbing	Ray Ortiz (478) 555-0285	Active	Feb 21, 2027	Compliant
BlueWave Pool Service ***	Pool	Marco Silva (478) 555-0558	Active	Nov 11, 2026	COI expiring
Brightline Electric *****	Electrical	Kim Tran (478) 555-0401	Active	Oct 12, 2026	COI expired W-9 missing
GreenCare Landscaping ***	Landscaping	Dana Green (478) 555-0882	Active	Jun 21, 2027	Compliant
Guardian Pest Control *****	Pest control	Lee Moss (478) 555-0841	Active	Dec 8, 2026	Compliant
Harper CPA Group ***	Accounting	Morgan Harper (478) 555-0879	Active	Mar 23, 2027	Compliant
QuickFix Handyman	General contractor	—	Do not use	—	COI missing W-9 missing
Smith & Lowe, Attorneys *****	Legal	Jordan Lowe (478) 555-0664	Active	May 12, 2027	Compliant
SparkClean Janitorial *****	Janitorial	Ana Ruiz (478) 555-0740	Active	Dec 23, 2026	Compliant

The vendor directory, with a compliance banner and a badge per vendor

The yellow banner at the top counts active vendors with a compliance problem. Click **Review** to filter the list down to them.

Compliance badges

Badge	Meaning
Compliant	Certificate of insurance, license and W-9 are all in order.
COI missing	No certificate of insurance expiration date is recorded.
COI expiring	The certificate of insurance expires within 30 days.
COI expired	The certificate of insurance has passed its expiration date.
License expired	The license expiration date has passed.
W-9 missing	The W-9 has not been marked as on file.

Tip: Expiring and expired vendor certificates of insurance also appear on the dashboard's **Coming due** list and in **Deadlines & tasks**. Ask for a renewed certificate before you send the vendor any more work.

How to add a vendor

1. In the sidebar, under **Records**, click **Vendors**.
2. Click **Add vendor**.
3. Under **Company**, enter the **Name** and choose a **Category** (for example Landscaping, Pool or Plumbing). Add the **Contact name**, **Email**, **Phone**, **Website** and **Address** if you have them.
4. Under **Insurance & license**, enter the **Insurance carrier**, **Policy number** and the date the **Certificate of insurance expires**. Add the **Workers' comp expires** date, the **License number** and the date the **License expires** where they apply.
5. Under **Payment & tax**, choose the **Payment terms**. Enter the **Tax ID (last 4)**; only the last four digits are stored. Tick **W-9 on file** once you have the vendor's W-9.
6. Optionally choose a **Rating** from 1 (poor) to 5 (excellent), and set the **Status**.
7. Add any **Internal notes** and save.

Vendor statuses

- **Active:** available for new work.
- **Inactive:** kept for history but not offered for new work.
- **Do not use:** flagged in red so no one hires them again. Use **Internal notes** to record why.

How to review a vendor

Click a vendor's name to open their page.

The screenshot displays the 'Brightline Electric' vendor page. The left sidebar contains navigation menus for 'Working in' (All associations (3)), 'COMMUNITY' (Units, Owners, Board members, Bylaws & governing docs, Amendments (6), Announcements), 'OPERATIONS' (Work orders (2), Violations, Architectural review (4), Meetings), 'FINANCIALS' (Receiveables, Billing, Collections, Payables (4), Budgets, Banking & GL, Reports), and 'RECORDS' (Vendors). The main content area includes a search bar, a breadcrumb 'Vendors / Brightline Electric', and the vendor name 'Brightline Electric' with category 'Electrical'. Action buttons at the top right are 'Active', '+ Add contract', 'Edit', and 'Delete'. The 'Contracts' section shows 'No contracts with this vendor in your associations.' The 'Recent invoices' section lists two invoices: INV-4054 (Oak Ridge HOA, Oct 21, 2026, \$1,725.00, Approved) and INV-1202 (Willow Creek Condominiums, Oct 18, 2026, \$1,725.00, Approved). The 'Recent work orders' section lists one work order: WO-00006 (Replace entrance monument lighting - Oak Ridge HOA, Completed). The 'Compliance' section shows: Certificate of insurance (Oct 12, 2026, Expired, Southern Casualty - CGL-1964858), Workers' comp (Jan 22, 2027, Current), License (Dec 11, 2026, Current, #GA-527149), and W-9 (Missing, Tax ID --0288). The 'Contact' section lists: Contact (Kim Tran), Email (kim.tran@brightline.test), Phone ((478) 555-0401), Website (https://brightline.test), Address (691 Nienow Trace Suite 606, Macon, GA), Payment terms (Net 30), and Rating (★★★★★).

A vendor page with compliance details, contracts, invoices and work orders

- The **Compliance** card shows the certificate of insurance, workers' comp, license and W-9, each labeled **Current**, **Expired** or **Missing**.
- **Contracts** lists the vendor's agreements in the associations you can see. Click **Add contract** at the top to create one with this vendor already selected.
- **Recent invoices** and **Recent work orders** show the vendor's latest activity. Click **View all** to open the full list.
- **Contact** shows phone, email, website, address, payment terms and rating.

How to update or remove a vendor

1. Open the vendor and click **Edit**. When a renewed certificate of insurance arrives, update its expiration date here.
2. To remove a vendor, click **Delete**.

Important: A vendor that has invoices, contracts or work orders is marked **Inactive** instead of being deleted, so your financial and maintenance history stays complete.

Contracts

Contracts track each association's service agreements with your vendors: landscaping, pool service, pest control, janitorial and so on. Their most important job is warning you before an agreement auto-renews or runs out.

Contracts
Vendor service agreements, with renewal-notice deadlines so nothing auto-renews by surprise.

2 contracts are inside the renewal notice window. [Show](#)

[+ Add contract](#)

CONTRACT	ASSOCIATION	VENDOR	TERM	NOTICE BY	AMOUNT	STATUS
Quarterly pest control Pest control	Oak Ridge HOA	Guardian Pest Control	Oct 24, 2024 – Oct 14, 2026	—	\$570.00 Quarterly	Expired
Quarterly pest control Pest control	Willow Creek Condominiums	Guardian Pest Control	Oct 24, 2024 – Oct 14, 2026	—	\$570.00 Quarterly	Expired
Pool service & chemicals Pool	Oak Ridge HOA	BlueWave Pool Service	Nov 24, 2025 – Nov 18, 2026	Sep 19, 2026 35 days overdue	\$1,150.00 Monthly	Active Renewal notice due
Pool service & chemicals Pool	Willow Creek Condominiums	BlueWave Pool Service	Nov 24, 2025 – Nov 18, 2026	Sep 19, 2026 35 days overdue	\$1,150.00 Monthly	Active Renewal notice due
Grounds maintenance Landscaping - Auto-renews	Oak Ridge HOA	GreenCare Landscaping	Dec 24, 2025 – Dec 24, 2026	Oct 25, 2026 tomorrow	\$36,000.00 Annual	Active
Grounds maintenance Landscaping - Auto-renews	Willow Creek Condominiums	GreenCare Landscaping	Dec 24, 2025 – Dec 24, 2026	Oct 25, 2026 tomorrow	\$36,000.00 Annual	Active

The contracts list, with renewal-notice and expired flags

The **Notice by** column shows the last day to give the vendor notice: the **End date** minus the **Renewal notice (days before end)**. When that date arrives, the contract shows **Renewal notice due**, and the banner at the top counts these contracts. Click **Show** in the banner to list just them. A contract past its end date shows **Expired**.

How to add a contract

1. In the sidebar, under **Records**, click **Contracts**, then **Add contract**. (Or start from a vendor's page with **Add contract**.)
2. Under **Agreement**, choose the association, the **Vendor** and the **Service type**, and give it a **Title** (for example *Grounds maintenance 2027*).
3. Under **Term & renewal**, enter the **Start date** and **End date**. Leave the end date blank for an open-ended agreement. Set **Renewal notice (days before end)**, and tick **Renews automatically** if the contract renews itself.
4. Under **Pricing**, enter the **Amount (\$)** and the **Billing frequency** (monthly, quarterly, annual, per service or fixed price).
5. Under **Signed copy & notes**, upload the **Contract PDF** (up to 20 MB, stored privately) and add any **Notes**.
6. Choose the **Status** and save.

Note: You need the vendor in your directory before you can add a contract. If there are no vendors yet, the form asks you to **Add vendor** first.

How to handle a renewal

1. Filter the contracts list to the ones with **Renewal notice due**.
2. Decide with the board whether to renew, rebid or cancel.
3. Edit the contract to record the outcome:
 - **Renewing:** set the new **End date** and price.
 - **Ending:** change the **Status** to **Cancelled**.
4. If you are rebidding, add the new vendor's contract once it is signed.

Uploading a new PDF on the edit form replaces the copy on file.

Insurance

Record each association's insurance policies with their limits, premiums and renewal dates.

Insurance
Association policies, renewal dates and the coverage every board should carry. [+ Add policy](#)

Coverage checklist

Willow Creek Condominiums: 1 required coverage missing.

- Master property**
Travelers · expires May 22, 2027 ● Covered
- General liability**
State Mutual · expires Nov 21, 2026 ● Expiring
- Directors & officers**
Southern Casualty · expires Feb 21, 2027 ● Covered
- Fidelity / crime bond**
No policy in force ● Missing [Add](#)

Any coverage ▾ Any status ▾ [Filter](#)

COVERAGE	CARRIER	COVERAGE	PREMIUM	EXPIRES
General liability #GE-9040853	State Mutual Agent: Taylor Brooks	\$2,800,000	\$3,900.00	Nov 21, 2026 ● Expires in 28 days
Directors & officers #DI-2926682	Southern Casualty Agent: Taylor Brooks	\$1,400,000	\$1,650.00	Feb 21, 2027 ● Current
Master property #MA-8456514	Travelers Agent: Taylor Brooks	\$11,900,000	\$18,400.00	May 22, 2027 ● Current

Willow Creek's insurance, with the coverage checklist showing a missing fidelity bond

The coverage checklist

When one association is selected in the **Working in** switcher, the **Coverage checklist** shows the four coverages almost every community association should carry:

- **Master property**
- **General liability**
- **Directors & officers**
- **Fidelity / crime bond**

Each line shows **Covered**, **Expiring** (within 60 days) or **Missing**. In the example, Willow Creek Condominiums has no fidelity bond in force, so that line shows **Missing** with an **Add** button.

Tip: Lenders, auditors and many state laws expect a fidelity (crime) bond large enough to cover the association's reserves plus a few months of assessments. A **Missing** line is worth raising with the board.

How to add an insurance policy

1. In the sidebar, under **Records**, click **Insurance**, then **Add policy** (or **Add** next to a missing line on the checklist).
2. Under **Policy**, choose the association and the **Coverage type**. Enter the **Carrier**, **Policy number**, **Effective date** and **Expiration date**.
3. Under **Limits & cost**, enter the **Coverage limit (\$)**, **Deductible (\$)** and **Annual premium (\$)**.
4. Under **Agent**, add the **Agent name**, **Agent email** and **Agent phone**.
5. Under **Policy document & notes**, upload the **Declarations page / policy** (a PDF or image, up to 20 MB, stored privately) and add any **Notes**.
6. Save.

Expiration badges

In the list, each policy's expiration date carries a badge:

- **Current**
- **Expires in N days**, starting 60 days before expiration
- **Expired**

Policies renewing within 60 days also appear in the association's **Upcoming** card and on the dashboard's **Coming due** list. When the renewal arrives, edit the policy and enter the new dates and premium.

Insurance policies also appear on resale and estoppel certificates (see [Resale and estoppel certificates](#)).

Reserve studies

A reserve study lists the major components an association must eventually repair or replace: roofs, paving, painting, pools, elevators and so on. It estimates whether the reserve fund can pay for them. HOA Manager keeps the component inventory and recalculates the funding picture whenever anything changes.

Reserve studies work on one association at a time. If **All associations** is selected, the page asks you to **Choose an association**.

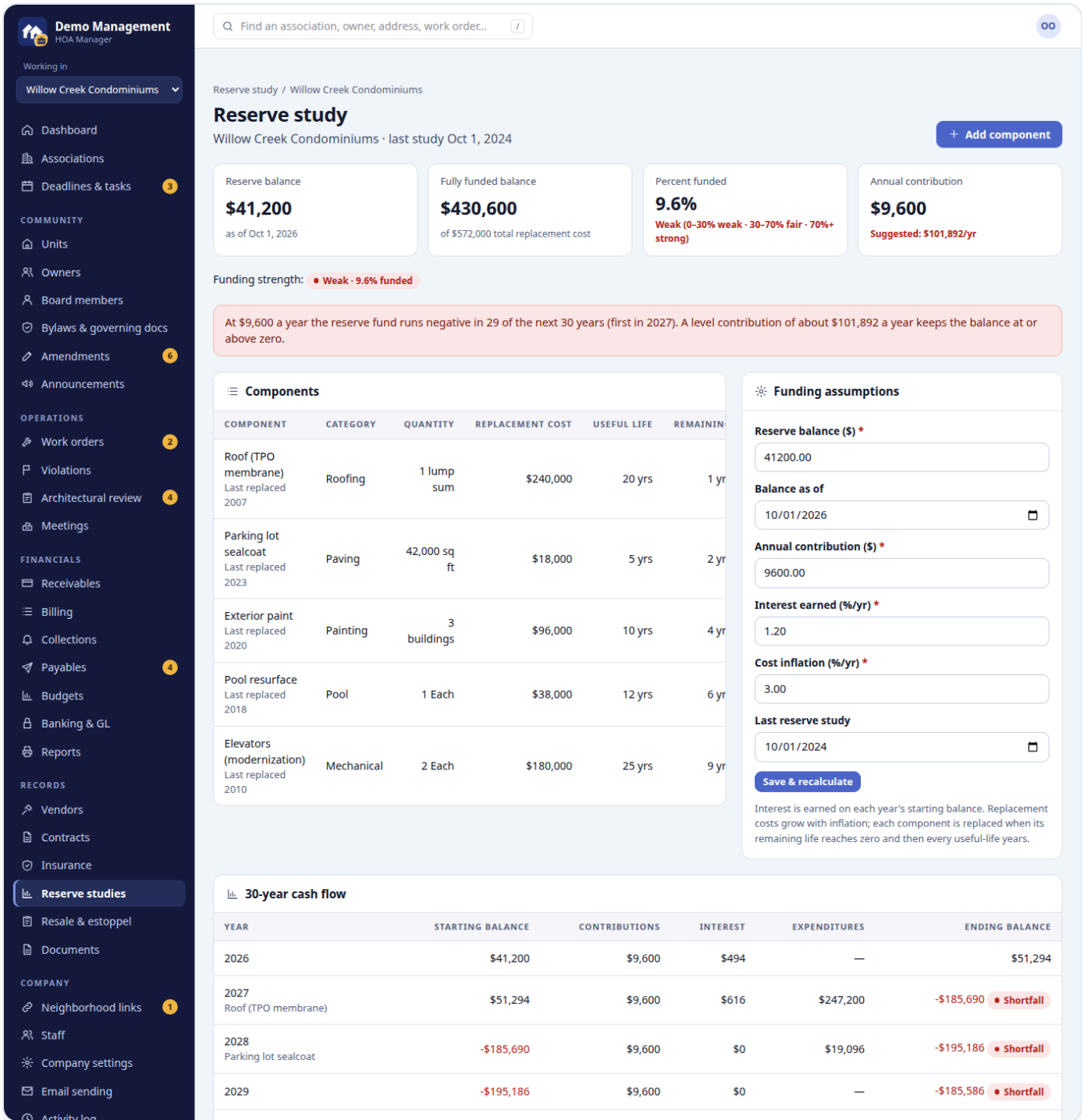


Figure	What it means
Fully funded balance	What the fund <i>should</i> hold today for the wear already used up: each component's replacement cost × (years used ÷ useful life).
Percent funded	Reserve balance ÷ fully funded balance.
Annual contribution	What the association currently puts into reserves each year, with the Suggested contribution beneath it.

Funding strength uses the usual industry bands:

- **0–30%: Weak.** A high risk of special assessments or deferred maintenance.
- **30–70%: Fair.**
- **70% and above: Strong.**

If the projection ever goes negative, a red warning says in how many years and from which year. It also gives the level annual contribution that keeps the balance at or above zero for 30 years. In the example, Willow Creek is 9.6% funded, and its roof replacement in 2027 would drive the fund negative.

The 30-year cash flow

For each year, the **30-year cash flow** table shows:

- **Starting balance**
- **Contributions**
- **Interest**, earned on the starting balance when it is positive
- **Expenditures**: components due that year, at today's cost grown by inflation, named under the year
- **Ending balance**

Years that end below zero are marked **Shortfall**. After a component is replaced, the projection schedules it again every useful-life years.

How to add reserve components

1. In the sidebar, under **Records**, click **Reserve studies**, with the association selected.
2. Click **Add component**.

3. Enter the **Name** (for example *Clubhouse roof*), **Category**, **Quantity** and **Unit of measure**.
4. Enter the **Replacement cost (\$)**: today's cost to replace the whole quantity.
5. Enter the **Useful life (years)** and **Remaining life (years)**. A remaining life of 0 means replacement is due this year.
6. Optionally record the **Last replaced (year)** and **Notes**, then save.

Use the pencil and trash icons in the components table to edit or delete a component.

How to update the funding assumptions

The **Funding assumptions** card on the right holds the association-level numbers. Only owners, administrators and accountants can change them.

1. Enter the current **Reserve balance (\$)** and the **Balance as of** date. A bank statement date works well.
2. Enter the **Annual contribution (\$)** from the approved budget.
3. Set **Interest earned (%/yr)** and **Cost inflation (%/yr)**.
4. Record the date of the **Last reserve study**.
5. Click **Save & recalculate**.

Tip: Update the reserve balance after each month-end close and the components after every professional reserve study. Most states and lenders expect a full study every 3–5 years, with annual updates in between. The seeded compliance calendar includes an *Update reserve study* reminder.

Resale and estoppel certificates

When a home sells or refinances, the title company, lender, buyer or seller asks the association for a resale or estoppel certificate. The certificate confirms the owner's balance, the assessments, any special assessments, open violations and collection actions. HOA Manager tracks each request against its deadline and produces the certificate from live records.

Demo Management
 HOA Manager

Working in
 All associations (3)

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Resale & estoppel
 Requests from title companies, lenders and buyers, with turnaround deadlines and a printable certificate.

+ Log request

Open Overdue All

Search number, requester or

Any status

Filter

REQUEST	ASSOCIATION	UNIT	REQUESTER	CLOSING	DUE	FEE	STATUS
EST-00002 Buyer: Luz Schmidt	Oak Ridge HOA	152 Maple Dr	Mr. Charles Corwin DDS Peach State Title	Oct 30, 2026	Oct 25, 2026 tomorrow Rush	\$350.00 Paid	In progress
EST-00006 Buyer: Orlando Schmitt	Willow Creek Condominiums	#205 · 2200 Willow Creek Dr	River Gerhold DDS Heritage Closing Co.	Oct 30, 2026	Oct 25, 2026 tomorrow Rush	\$350.00 Paid	In progress
EST-00001 Buyer: Mrs. Arvilla Klocko MD	Oak Ridge HOA	144 Magnolia Pl	Royce Koss First Coast Title	Nov 5, 2026	Nov 1, 2026 in 8 days	\$250.00 Unpaid	Received
EST-00003 Buyer: Prof. Lily Blick	Oak Ridge HOA	160 Cedar Way	Miss Earnestine Jacobson DDS First Coast Title	Nov 13, 2026	Nov 1, 2026	\$250.00 Paid	Completed
EST-00005 Buyer: Nyah Wisozk	Willow Creek Condominiums	#203 · 2200 Willow Creek Dr	Jailyn Kovacek I Heritage Closing Co.	Nov 5, 2026	Nov 1, 2026 in 8 days	\$250.00 Unpaid	Received
EST-00007 Buyer: Chloe Monahan	Willow Creek Condominiums	#207 · 2200 Willow Creek Dr	Miss Sandra Boyer Peach State Title	Nov 13, 2026	Nov 1, 2026	\$250.00 Paid	Completed

Resale and estoppel requests with due dates, rush flags and fee status

The tabs at the top filter the list:

- **Open:** requests still being worked.
- **Overdue:** requests past their due date.
- **All**

The **Due** column shows rush requests with a **Rush** badge and counts down the days. The **Fee** column shows whether the fee is **Paid** or **Unpaid**.

How to log an estoppel request

1. In the sidebar, under **Records**, click **Resale & estoppel**, then **Log request**.
2. Under **Property**, choose the **Unit**. The list is grouped by association; pick the association in the sidebar to narrow it. Add the **Buyer** and the **Closing date**.
3. Under **Requester**, choose the **Requester type** (title company, buyer, seller, lender, attorney or realtor). Enter the **Name**, **Company**, **Email** and **Phone**.

4. Under **Turnaround & fee**, tick **Rush order** if the requester paid for it. Enter the **Fee (\$)** and, if you need to, a **Due date**. Left blank, the due date is set to 10 days out, or 3 days for rush.
5. Add any **Notes** and save. The request gets a number such as **EST-00003**.

Request statuses

Status	Meaning	Buttons available
Received	Logged, not started.	Start work, Cancel request
In progress	You are gathering the information.	Mark completed, Reopen, Cancel request
Completed	The certificate is ready.	Mark delivered, Start work, Cancel request
Delivered	Sent to the requester. This status is final.	n/a
Cancelled	No longer needed.	Reopen

How to generate, print and send the certificate

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Resale & estoppel / EST-00003

Estoppel EST-00003

160 Cedar Way · Oak Ridge HOA

Completed View certificate Edit

Workflow

Mark delivered Start work Cancel request Regenerate certificate Mark fee unpaid

Received → in progress → completed → delivered. Generating the certificate captures the unit's balance, violations and other facts as of that moment.

Request

Unit	160 Cedar Way
Buyer	Prof. Lily Blick
Closing date	Nov 13, 2026
Due	Nov 1, 2026
Received	Oct 24, 2026 3:20 AM
Completed	Oct 23, 2026 3:20 AM
Delivered	—
Fee	\$250.00 Paid

Requester

Name	Miss Earnestine Jacobson DDS
Type	Title company
Company	First Coast Title
Email	closings@peachstatetitle.test
Phone	—

Delete request

Email the certificate

Send to *

closings@peachstatetitle.test

Note to include (optional)

Sending marks this request delivered.

Send certificate

Certificate snapshot

Open →

As of	Oct 24, 2026 3:20 AM
Balance due	\$0.00
Open violations	0
Collections	None

An estoppel request with its workflow buttons, the email form and the certificate snapshot

1. Open the request.
2. In the **Workflow** card, click **Generate certificate**. HOA Manager takes a snapshot of the unit's records at that moment:
 - owners of record
 - balance due
 - regular assessment
 - special assessments

- open violations
- any open collection case
- the association's insurance
- your company's contact details

Generating also moves a **Received** request to **In progress**. Marking a request completed generates the certificate if it doesn't have one yet.

3. Click **View certificate** to see the formatted document, then **Print**. Your browser can print it or save it as a PDF.

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oo

Resale & estoppel / EST-00003 / Certificate

Certificate EST-00003

Print or save as PDF from your browser.

Print

Back to request

Demo Management

400 Cherry St, Suite 210, Macon, GA, 31201

(478) 555-0100 · office@demo-management.test · https://demo-management.test

License #CAM-GA-004512

Certificate EST-00003

As of Oct 24, 2026 3:20 AM

Prepared for Miss Earnestine Jacobson DDS, First Coast Title

Resale / Estoppel Certificate

Oak Ridge Homeowners Association, Inc. · 100 Oak Ridge Pkwy, Macon, GA, 31210

Property

Property

160 Cedar Way, Macon, GA, 31210

Lot

15

Owner(s) of record

Jazlyn Ondricka

Prospective buyer

Prof. Lily Blick

Scheduled closing

Nov 13, 2026

Assessments & account status

Regular assessment

\$165.00 monthly

Balance due as of Oct 24, 2026

\$0.00

Collection action

None

Special assessments

No special assessments are currently levied.

Open violations

No open violations are recorded for this property.

Association insurance

Coverage

Carrier

Policy

Expires

Agent

Directors & officers

Southern Casualty

DI-8351782

Feb 21, 2027

Taylor Brooks · (478) 555-0190

General liability

State Mutual

GE-1217640

Nov 21, 2026

Taylor Brooks · (478) 555-0190

Master property

Travelers

MA-0617483

May 22, 2027

Taylor Brooks · (478) 555-0190

Managing agent

Company

Demo Management

Community manager

Marcus Manager · manager@demo-management.test

Contact

(478) 555-0100 · office@demo-management.test

The printable resale and estoppel certificate

- If the owner pays or a violation is resolved before closing, click **Regenerate certificate** to take a fresh snapshot. You are asked to confirm, because the old snapshot is replaced.
- To email the certificate, use the **Email the certificate** card:
 - Send to** is filled in with the requester's email; change it if you need to.
 - Add an optional **Note to include**.
 - Click **Send certificate**.

Sending a **Completed** request marks it **Delivered**. The email goes out with your company's email settings (see **Company setup**).

6. When the fee arrives, click **Mark fee paid**. Click **Mark fee unpaid** to undo it.

Important: The certificate shows the balance *as of* the moment it was generated, and the printout says so. Charges and payments posted afterwards are not included, so regenerate it if the closing is several days away.

You can use **Edit** to change the request's details and **Delete request** to remove it entirely.

Documents

Documents is the file library: governing documents, financial statements, minutes, insurance certificates, contracts, correspondence and forms. Files can belong to one association, or be company-wide templates and policies.

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Documents
Governing documents, financials, minutes and forms for each association, plus company-wide templates. [+ Upload document](#)

Search title, description or file All associations Any category Any visibility Filter

Governing documents

TITLE	ASSOCIATION	VISIBILITY	EFFECTIVE	SIZE	
Collection policy (adopted) collection-policy-adopted.pdf	Willow Creek Condominiums	All owners	Sep 25, 2026	732 B	Download
Collection policy (adopted) collection-policy-adopted.pdf	Oak Ridge HOA	All owners	Aug 30, 2026	720 B	Download

Financial

TITLE	ASSOCIATION	VISIBILITY	EFFECTIVE	SIZE	
Financial statements — September 2026 financial-statements-september-2026.pdf	Willow Creek Condominiums	Board	Sep 19, 2026	742 B	Download
Financial statements — September 2026 financial-statements-september-2026.pdf	Oak Ridge HOA	Board	Sep 14, 2026	730 B	Download

Insurance

TITLE	ASSOCIATION	VISIBILITY	EFFECTIVE	SIZE	
Certificate of insurance (master policy) On HOA portal certificate-of-insurance-master-policy.pdf	Oak Ridge HOA	All owners	Sep 24, 2026	733 B	Download
Certificate of insurance (master policy) certificate-of-insurance-master-policy.pdf	Willow Creek Condominiums	All owners	Sep 17, 2026	745 B	Download

The document library grouped by category, with one file on the HOA portal

Documents are grouped by **Category**. Each row shows the **Association**, who can see it (**Visibility**), the **Effective** date and the file **Size**. Files currently shared on the HOA's Neighborhood portal carry an **On HOA portal** badge. Use the filters to narrow by association (including **Company-wide** only), category and visibility, or search titles, descriptions and file names.

Tip: Bylaws, CC&Rs and rules have their own home with version history and amendment tracking. See the **Governance** chapter. Use the library for everything else.

How to upload a document

1. In the sidebar, under **Records**, click **Documents**, then **Upload document**.
2. Choose the **Association**, or **Company-wide (all associations)**. Only owners, administrators and accountants can upload company-wide documents.

3. Enter a **Title** and choose a **Category**: governing documents, financial, insurance, meeting minutes, contracts, correspondence, forms or other.
4. Choose **Who can see it**:
 - **Management only**: your team only.
 - **Board**: suitable to share with the board.
 - **All owners**: suitable for every owner.
5. Optionally add a **Description** and **Effective date**.
6. Choose the **File**: PDF, Word, Excel, CSV, JPG, PNG or text, up to 20 MB. Files are stored privately and are only available to people who can see the association.
7. Save.

To change a document, open it and click **Edit**. You can update its details or **Replace file**. **Delete** removes the file permanently.

How to publish a document to the HOA portal

If the association is connected to its Neighborhood app, you can share board and owner documents on the HOA's portal.

1. Open the document. The **HOA portal** card shows whether it is published.
2. Click **Publish to HOA portal**. The portal downloads its own copy through a secure link that stays valid for 7 days.
3. After replacing the file, click **Publish again** to send the new version.

What can't be published:

- **Management only** documents. Change **Who can see it** to **Board** or **All owners** first.
- **Company-wide** documents. Upload a copy to the association to publish it there.

How to unpublish a document

1. Open the document and click **Unpublish**.
2. Confirm. The portal's download link stops working.

Remove the document from the HOA's own portal as well if residents already downloaded it there.

Governance

Every community association is governed by a stack of documents. In HOA Manager you keep these under **Bylaws & governing docs**: the articles of incorporation, the declaration (CC&Rs), the bylaws, rules and regulations, architectural guidelines, board policies and resolutions. Each document keeps every version ever adopted and records how it can be amended.

When the board wants to change one of these documents, you track the change under **Amendments**. HOA Manager walks the amendment through each step and works out whether the vote passed using that document's own approval rules. Once the amendment is in effect, the amended document becomes the new current version.

Both items are in the **Community** section of the sidebar.

Governing documents

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Bylaws & governing documents

Articles, declaration (CC&Rs), bylaws, rules and policies for each association, with every version kept and the rules for amending each one.

Amendments + Add document

All document types Filter

DOCUMENT	TYPE	CURRENT VERSION	EFFECTIVE	TO AMEND	VERSIONS	STATUS
Articles of Incorporation — Oak Ridge Homeowners Association, Inc.	Articles of incorporation	As filed	Feb 12, 2004	Board approval, then 66.67% of owners of all eligible votes	1	In force
Declaration of Covenants, Conditions and Restrictions — Oak Ridge HOA	Declaration / CC&Rs	Amended Sep 24, 2026 (AMD-00001)	Sep 24, 2026	Board approval, then 67% of owners of all eligible votes; recorded with the county	2	In force
Bylaws of Oak Ridge Homeowners Association, Inc.	Bylaws	Original	Feb 12, 2004	Board approval, then 66.67% of owners of all eligible votes	1	In force 2 amendments in progress
Rules & regulations	Rules & regulations	2025 edition	Jan 1, 2025	Board approval	1	In force 1 amendment in progress

Oak Ridge HOA's governing documents with current versions and amendment rules

The list shows one row per document. Pick an association in the **Working in** switcher, or see all of them grouped by association. Each row shows:

- **Type**
- **Current version** and when it became **Effective**
- **To amend**: a plain-language summary of what it takes to change the document
- the number of **Versions** on file
- **Status**: **In force**, **Draft** or **Superseded**. A badge also shows when amendments are in progress.

Use the **All document types** filter to narrow the list.

Document types

Type	Typical content
Articles of incorporation	The filing that created the association as a corporation.
Declaration / CC&Rs	Recorded covenants, conditions and restrictions that run with the land.
Bylaws	How the association is run: board, elections, meetings, officers.
Rules & regulations	Day-to-day rules (pool, parking, trash), usually adopted by the board.
Architectural guidelines	Standards the ARC uses to review changes.
Board policy / Board resolution	Collection policy, fine schedule and other board-adopted policies.
Plat / survey	Recorded maps.

How to add a governing document

1. In the sidebar, click **Bylaws & governing docs**, then **Add document**. (If the association has none yet, you can also click **Add the bylaws**.)
2. Under **Document**:
 1. Choose the **Association** and **Type**.

2. Enter the full **Title**, for example *Amended and Restated Bylaws of Oak Ridge HOA, Inc.*
 3. Set the **Status** and the date the document was **Originally adopted**.
 4. Add a **Description** if useful.
3. Under **How this document is amended**, copy the rules from the document's own amendment article. They set the vote needed whenever an amendment is proposed:
- **Approved by: Board vote only**, or **Board proposes, owners vote**.
 - **Owner approval (%)**: for example 66.67 for two-thirds.
 - **Percentage of: of all eligible votes**, or **of votes cast (quorum required)**.
 - **Quorum (%)**: needed when the percentage is of votes cast.
 - **Amendment article / section**: for example *Article XII, Section 1*.
 - Tick **Amendments must be recorded with the county before they take effect** where that applies. The declaration usually must; bylaws and rules usually don't.
 - **Other requirements**: notice period, mortgagee approval and so on.
4. Under **Current version**, upload the **File** (PDF, Word, RTF or text; up to 30 MB). Then add:
- a **Version label** (defaults to "Original")
 - the **Effective date**
 - for recorded documents, **Recorded on, County, Instrument #** and **Book / page**
5. Save. The document opens with its version history.

Tip: Getting the amendment rules right matters. HOA Manager uses them later to decide whether an owner vote passed. If you're unsure, check the document's amendment article with the association's attorney.

Version history and the document page

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Governing documents / Declaration of Covenants, Conditions and Restrictions — Oak Ridge HOA

Declaration of Covenants, Conditions and Restrictions — Oak Ridge HOA

Declaration / CC&Rs · Oak Ridge HOA

In force Download current Edit Propose amendment

Version history

VERSION	EFFECTIVE	RECORDED	CAME FROM	
Amended Sep 24, 2026 (AMD-00001) • Current Allow six-foot privacy fences in rear yards — Section 8.3	Sep 24, 2026	Sep 4, 2026 2026-007561 · Book 9153, Page 744	AMD-00001	Download Publish to portal
Original (recorded)	Feb 12, 2004	Feb 12, 2004 Bibb · 2004-005830	Uploaded Oct 24, 2026	Download

Amending this document

Requires	Board approval, then 67% of owners of all eligible votes; recorded with the county
Authority	Article XIV
Originally adopted	Feb 12, 2004

Amendments

AMD-00001 · Allow six-foot privacy fences in rear yards
Section 8.3 · proposed Oct 24, 2026 In effect

+ Upload a version without an amendment

The declaration's page with two versions, recording details and its amendment

The document page shows:

- **Version history:** every version, newest first. The version in force is marked **Current**. Each row shows when it became **Effective**, when and where it was **Recorded**, and where it **Came from**: either the amendment that produced it, or "Uploaded" with the date. Click **Download** on any version.
- **Amending this document:** what the document **Requires**, the **Authority** (amendment article) and when it was **Originally adopted**.
- **Amendments:** every amendment proposed for this document and its status.

- Buttons at the top: **Download current**, **Edit** and **Propose amendment**.

How to upload a version outside an amendment

Use this for history: older versions, a scan of the recorded copy, or a restatement adopted before your company managed the association. To change the document going forward, propose an amendment instead.

1. On the document page, open **Upload a version without an amendment**.
2. Choose the **File**, enter a **Version label**, and add the **Effective date** and any recording details: **Recorded on**, **County**, **Instrument #** and **Book / page**.
3. Describe **What changed**.
4. Leave **Make this the current version** ticked if this version is the one in force. Untick it for older historical copies.
5. Click **Upload version**.

How to publish a governing document to the HOA portal

When the association is connected to its Neighborhood app, owners can read the current version on their portal.

1. On the document page, find the **Current** version.
2. Click **Publish to portal**. The document is added to the association's document library as an owner document and sent to the portal.
3. After a new version takes effect, click **Publish to portal** on the new current version. If you republish the same version, the button reads **Re-send to portal**.

How to delete a governing document

Delete document is only available while a document has no amendments. It removes the document and all its versions. Once a document has amendment history, set its **Status** to **Superseded** instead.

Amendments

An amendment is a proposed change to one governing document. The amendment page shows a progress bar of the steps that apply to that document:

Step	Happens when
1. Draft	You write the proposal.
2. Board vote	The board reviews it and votes.
3. Owner vote	Only for documents that need owner approval.
4. Approved	The vote passed.
5. Recorded	Only for documents that must be recorded with the county.
In effect	The amended document is uploaded and becomes current.

An amendment can also end as **Not approved** (a vote failed) or **Withdrawn**.

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Amendments

Proposed changes to bylaws, CC&Rs and rules, from draft through board and owner votes to recording and adoption.

+ Propose amendment

All statuses Filter

AMENDMENT	ASSOCIATION	DOCUMENT	SECTIONS	VOTE CLOSES	STATUS
AMD-00008 Extend pool hours in summer	Willow Creek Condominiums	Rules & regulations	—	—	Approved
AMD-00007 Allow electronic voting and notice	Willow Creek Condominiums	Bylaws of Willow Creek Condominium Association, Inc.	Article IV, Section 6	—	Board review
AMD-00006 Minimum lease term of 30 days	Willow Creek Condominiums	Bylaws of Willow Creek Condominium Association, Inc.	Article VII	Nov 22, 2026	Owner vote
AMD-00005 Allow six-foot privacy fences in rear yards	Willow Creek Condominiums	Declaration of Condominium — Willow Creek Condominiums	Section 8.3	Aug 24, 2026	In effect
AMD-00004 Extend pool hours in summer	Oak Ridge HOA	Rules & regulations	—	—	Approved
AMD-00003 Allow electronic voting and notice	Oak Ridge HOA	Bylaws of Oak Ridge Homeowners Association, Inc.	Article IV, Section 6	—	Board review
AMD-00002 Minimum lease term of 30 days	Oak Ridge HOA	Bylaws of Oak Ridge Homeowners Association, Inc.	Article VII	Nov 22, 2026	Owner vote

All amendments across the portfolio, by status

The **Amendments** list in the sidebar shows every amendment with its association, document, sections and the date owner voting closes. The count badge in the sidebar shows how many are waiting on the next step.

How to propose an amendment

1. Open the governing document and click **Propose amendment**, or click **Propose amendment** on the **Amendments** list and choose the **Document being amended**.
2. Under **Proposal**, enter:
 - a short **Title** (for example *Limit short-term rentals*)
 - the **Sections affected** (for example *Article VII, Section 3*)
 - who it was **Proposed by**: the board, a committee or an owner petition
 - **Why**: the rationale that will be shared with owners
3. Under **Text**:
 - Paste the **Current text**, the section as it reads today.
 - Write the **Proposed text**.
4. Save. The amendment is created as a **Draft** with a number such as **AMD-00002**. You can **Edit draft** until it goes to the board.

Important: When an amendment is created, it takes a snapshot of the document's approval rules and of the eligible votes (the association's unit count). Editing the document's rules later does not change a vote already under way.

How to take an amendment through the board

1. On the amendment page, the **Next: send to the board** card appears. Once the wording is final, add an optional note and click **Send to board review**. After this the text can no longer be edited; to change it, withdraw the amendment and propose a new one.
2. After the board meets, use **Next: record the board's vote**. Enter:
 - the **Vote date**
 - the number of votes **For**, **Against** and **Abstain**
 - optionally, the meeting it happened **At** (the **At meeting** field)
3. Click **Record board vote**. What happens next depends on the document:
 - **Board vote only** (most rules and policies): a majority in favor approves the amendment.
 - **Board proposes, owners vote**: a majority in favor sends it to the owners.

- A majority against marks the amendment **Not approved**.

How to run the owner vote

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Find an association, owner, address, work order... [7]

Amendments / Bylaws of Oak Ridge Homeowners Association, Inc. / AMD-00002

AMD-00002 · Minimum lease term of 30 days
Bylaws of Oak Ridge Homeowners Association, Inc. · Oak Ridge HOA

Owner vote Notify owners via portal

1. Draft → 2. Board vote → 3. Owner vote → 4. Approved → 5. In effect

Owner vote

Requires Board approval, then 66.67% of owners of all eligible votes. Rules were fixed when this amendment was proposed.

Notice sent
10/09/2026

Voting opens
10/23/2026

Voting closes
11/22/2026

Eligible votes *
48
Defaults to the number of units.

Owners' meeting
Vote by ballot only

Save vote details

Record the result

For *
[]

Against *
[]

Abstain
0

Eligible votes *
48

Record result

Text

Short-term rentals have increased noise and parking complaints.

Current
Owners may lease their units.

Proposed
Owners may lease their units for an initial term of not less than thirty (30) days. Short-term or transient rentals are prohibited.

Summary

Document: Bylaws of Oak Ridge Homeowners Association, Inc.
Sections: Article VII
Proposed by: Board of Directors
Approval needed: Board approval, then 66.67% of owners of all eligible votes
Board vote: Oct 4, 2026: 4-1-0
Owner voting: Oct 23, 2026 – Nov 22, 2026

History

- Vote details updated
Oct 24, 2026 3:20 AM · Olivia Owner
- Board vote 4 for, 1 against, 0 abstaining: sent to owners for a vote
Oct 24, 2026 3:20 AM · Olivia Owner
- Sent to the board for review
Oct 24, 2026 3:20 AM · Olivia Owner
- Amendment drafted
Oct 24, 2026 3:20 AM · Olivia Owner

Withdraw

Reason (optional)
[]

Withdraw amendment

An amendment in the owner vote, with the vote details and tally forms

The **Owner vote** card states what the vote requires, for example "Board approval, then 66.67% of owners of all eligible votes".

1. Fill in the vote details:

- **Notice sent**
- **Voting opens** and **Voting closes**
- **Eligible votes**, which defaults to the number of units. Change it if your documents allocate votes differently.
- the **Owners' meeting**, if the vote happens at one, or **Vote by ballot only**

2. Click **Save vote details**. You can update these while voting is open.
3. When voting closes, under **Record the result**, enter the votes **For**, **Against** and **Abstain**, and the **Eligible votes**.
4. Click **Record result** and confirm. HOA Manager marks the amendment **Approved** or **Not approved**, and the **Summary** shows the percentage in favor.

How the result is worked out

The approval percentage is measured one of two ways, depending on the document's **Percentage of** setting.

Of all eligible votes: votes in favor ÷ eligible votes must reach the required percentage. Owners who didn't vote count against the amendment in practice.

Example: Oak Ridge has 48 eligible votes and needs 66.67%. With 36 for, 4 against and 1 abstaining, $36 \div 48 = 75\%$, so the amendment **passes**. With 30 for and none against, $30 \div 48 = 62.5\%$, so it **fails**, even though no one voted no.

Of votes cast (quorum required): two tests must both pass:

1. **Quorum:** all ballots returned (for, against and abstain) ÷ eligible votes must reach the **Quorum (%)**.
2. **Approval:** for ÷ (for + against) must reach the required percentage. Abstentions count toward quorum but not toward approval.

Example: 100 eligible votes, a 25% quorum and 51% approval. With 15 for and 5 against, only 20% participated, so it **fails** for lack of quorum. With 20 for and 10 against, 30% participated (quorum met) and $20 \div 30 = 66.7\%$ approved, so it **passes**.

HOA Manager won't accept a tally with more votes than eligible voters.

How to notify owners through the HOA portal

When the association is connected to its Neighborhood app, you can tell owners about an amendment while it is in board review or the owner vote.

1. On the amendment page, click **Notify owners via portal** and confirm.
2. HOA Manager posts an announcement to the portal and emails members. It includes the title, sections affected, rationale, the approval requirement, the voting dates or meeting, and the full proposed text.
3. The **Summary** records when **Owners notified**. To send a reminder, click **Send notice again**.

How to record an amendment and put it in effect

1. If the document must be recorded with the county, the **Next: record with the county** card appears once the amendment is **Approved**. Enter the date it was **Recorded on**, plus the **Instrument #** and **Book / page**, and click **Save recording**.
2. Then, in **Next: put it in effect**:
 1. Upload the **Amended document**: the amended, or amended and restated, text.
 2. Set the **Effective date**.
 3. Optionally change the **Version label**. It defaults to "Amended *date (AMD number)*".
3. Click **Adopt and make current**.

The amendment moves to **In effect**. The uploaded file becomes the document's **Current** version, carrying the recording details, and the previous version stays in the history. Remember to publish the new current version to the portal if owners should see it.

How to withdraw an amendment

1. On the amendment page, find the **Withdraw** card. It is available until the amendment is in effect.
2. Optionally enter a **Reason**, then click **Withdraw amendment** and confirm.

Withdrawn amendments stay on file with their history.

The amendment history

Every step is logged in the **History** card, with who did it and when:

- drafted
- sent to the board
- the board vote tally
- vote details updated
- the owner result
- recording
- adoption, or withdrawal

These entries also appear in the company **Activity log**. Together they give you an audit trail if an amendment is ever challenged.

Communication and deadlines

This chapter covers two tools you use every week:

- **Announcements:** post news to one association's Neighborhood portal, or to many at once.
- **Deadlines & tasks:** the compliance calendar of tax filings, annual reports, insurance renewals, inspections and meetings for every association, plus your own to-dos.

Announcements

An announcement is a message to residents: a pool closing, office holiday hours, a reminder about a board meeting. HOA Manager delivers it through each association's connected Neighborhood app, which shows it on the HOA portal and can also email the HOA's members.

Demo Management
HOA Manager

Working in
All associations (3)

Dashboard
Associations
Deadlines & tasks (3)
COMMUNITY
Units
Owners
Board members
Bylaws & governing docs
Amendments (6)
Announcements
OPERATIONS
Work orders (2)
Violations
Architectural review (4)
Meetings

Find an association, owner, address, work order... (7)

Announcements

Post news to your HOAs' Neighborhood portals, one association or many at once. [New announcement](#)

Search announcements [Filter](#)

ANNOUNCEMENT	SENT	DELIVERY
Holiday office hours Our office will be closed November 26-27. For emergencies, call the after-hours line at (4...	Oct 23, 2026 3:20 AM by Marcus Manager	1 delivered • 1 not connected
Pool closes for the season on October 31 Thank you for a great summer! The pool closes for the season on October 31 and reopens Mem...	Oct 14, 2026 3:20 AM by Marcus Manager	1 delivered • 1 not connected

The announcement list with delivery results per announcement

The list shows each announcement with when it was **Sent**, who sent it, and a **Delivery** summary. For example, **1 delivered • 1 not connected** means it reached one association's portal and was recorded as not delivered for an association without a connection.

Note: Announcements reach residents only through the Neighborhood app. If an association isn't connected yet, see **Connecting the Neighborhood app** earlier in this manual, or contact that HOA's board another way.

How to send an announcement

The screenshot shows the 'New announcement' form in the HOA Manager interface. The sidebar on the left contains navigation links for Demo Management, Working in, All associations (3), Dashboard, Associations, Deadlines & tasks, COMMUNITY (Units, Owners, Board members, Bylaws & governing docs, Amendments), Announcements (selected), OPERATIONS (Work orders, Violations, Architectural review, Meetings), FINANCIALS (Receivables, Billing, Collections, Payables, Budgets, Banking & GL, Reports), and a search bar. The main form area has a search bar at the top and a 'New announcement' header. Below the header is a 'Message' section with a 'Title' field and a 'Message' text area. There is an 'Expires' date/time picker and an 'Email' checkbox labeled 'Also email the HOA's members'. Below the 'Email' checkbox is a note: 'The Neighborhood app sends the email to its own member list.' At the bottom is a 'Send to' section with a checkbox for 'Every connected association (1)' and a list of associations: Cedar Point Townhomes (Not connected), Oak Ridge HOA (Connected), and Willow Creek Condominiums (Not connected). A note below the list states: 'Associations without a Neighborhood app connection are recorded as not delivered.' At the bottom right are 'Cancel' and 'Send announcement' buttons.

A new announcement, choosing which associations receive it

1. In the sidebar, under **Community**, click **Announcements**, then **New announcement**.
2. Under **Message**, enter a **Title** and the **Message**.
3. Optionally set **Expires**. The portal hides the announcement after this date and time.
4. Optionally tick **Also email the HOA's members**. The Neighborhood app sends the email to its own member list; HOA Manager does not need owners' email addresses for this.
5. Under **Send to**, choose the associations:
 - Tick individual associations. Each one shows whether it is **Connected** or **Not connected**.

- Or tick **Every connected association** to send to all associations with an active Neighborhood connection.

6. Click **Send announcement**.

You can send to associations that aren't connected; they are recorded as **Not connected** so you can see who did not receive it. You need permission to edit records to send announcements. Read-only users can view them.

Delivery statuses

Open an announcement to see the **Delivery** card, which shows the status for each association:

Status	Meaning
Queued	Waiting to be sent to the Neighborhood app. Delivery is normally automatic within a minute or two.
Delivered	The HOA's portal confirmed it received the announcement.
Failed	The portal couldn't be reached or refused the message. The reason is shown.
Not connected	The association has no active Neighborhood app connection, so nothing was sent.

How to retry a failed announcement

1. Open the announcement.
2. If any association is **Failed** or still **Queued**, click **Retry failed (N)** at the top.
3. HOA Manager sends a fresh copy to those associations. Delivered ones are not sent again.

If an association keeps failing, open its connection under **Neighborhood links** and use **Test connection**. The Neighborhood app may be offline, or the connection may be paused.

Tip: Community managers and staff see announcements only for the associations in their portfolio. Owners, administrators and accountants see all of them.

Deadlines and tasks

Deadlines & tasks is your compliance calendar. It lists everything that must happen by a date, for each association and company-wide:

- tax returns and the state annual report
- budget adoption and the annual meeting
- insurance reviews and audits
- inspections and reserve study updates
- anything else you add

The sidebar badge counts open deadlines due within the next 7 days, including overdue ones.

The screenshot displays the 'Deadlines & tasks' section of the Demo Management HOA Manager. The sidebar on the left contains navigation links for various sections, with badge counts indicating open deadlines due within the next 7 days: Amendments (6), Work orders (2), Architectural review (4), and Payables (4). The main content area features a search bar, a title 'Deadlines & tasks', and a description 'Compliance calendar: filings, renewals, inspections and meetings across your portfolio.' Below this are tabs for 'List' and 'Calendar', and a filter bar with dropdowns for 'All associations', 'Any category', 'Anyone', and 'Open', along with a 'Filter' button. The tasks are grouped into three sections: 'Overdue' (1 item), 'This week' (2 items), and 'Next 30 days' (7 items). Each task entry includes a date, title, details, and a 'Done' button.

Section	Date	Task Title	Details	Status
Overdue	OCT 21	Walk-through inspection for violations	Oak Ridge HOA · Inspection · Oct 21, 2026 (3 days overdue) · repeats monthly · Sofia Staff	Done
This week	OCT 28	Collect bank statements and records from prior treasurer	Cedar Point Townhomes · Financial · Oct 28, 2026 (in 4 days) · Marcus Manager	Done
	OCT 30	Elevator certificate posted in cab	Willow Creek Condominiums · Inspection · Oct 30, 2026 (in 6 days) · repeats annually · Priya Patel	Done
Next 30 days	NOV 1	Prepare and adopt next year's budget	Oak Ridge HOA · Financial · Nov 1, 2026 (in 8 days) · repeats annually	Done
	NOV 1	Prepare and adopt next year's budget	Cedar Point Townhomes · Financial · Nov 1, 2026 (in 8 days) · repeats annually	Done
	NOV 11	Renew pool operating permit with county	Oak Ridge HOA · Filing / tax · Nov 11, 2026 (in 18 days) · repeats annually · Marcus Manager	Done
	NOV 13	Quarterly staff security training	Company-wide · Other · Nov 13, 2026 (in 20 days) · repeats quarterly · Andre Admin	Done
	NOV 15	Monthly financial package to the board	Willow Creek Condominiums · Financial · Nov 15, 2026 (in 22 days) · repeats monthly	Done

Deadlines grouped into overdue, this week and the next 30 days

The list view

The **List** tab groups open deadlines:

- **Overdue:** past the due date and still open (in red).
- **This week**
- **Next 30 days**
- **Later**

Each line shows the association (or **Company-wide**), the category, the due date with a countdown such as "in 8 days" or "3 days overdue", whether it repeats, and who it's assigned to. Click **Done** to complete it, or click the title to edit it.

Filtering

Use the filters above the list:

- **Association:** **All associations**, **Company-wide** (tasks not tied to one association), or a single association.
- **Category:** Filing / tax, Insurance, Meeting, Financial, Inspection, Contract or Other.
- **Assigned to:** **My tasks**, or any staff member.
- **Status:** **Open**, **Done**, or **Open and done**.

Click **Filter** to apply.

The calendar view

Demo Management
HOA Manager

Working in
All associations (3)

Dashboard
Associations
Deadlines & tasks 3

COMMUNITY
Units
Owners
Board members
Bylaws & governing docs
Amendments 6
Announcements

OPERATIONS
Work orders 2
Violations
Architectural review 4
Meetings

FINANCIALS
Receivables
Billing
Collections
Payables 4
Budgets
Banking & GL
Reports

RECORDS
Vendors
Contracts

Find an association, owner, address, work order... 7

oo

Deadlines & tasks
Compliance calendar: filings, renewals, inspections and meetings across your portfolio.

+ Add deadline

List
Calendar

All associations Any category Anyone Open Filter

October 2026 Today

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21 Walk-through inspect...	22	23	24
25	26	27	28 Collect bank stateme...	29	30 Elevator certificate p...	31

The month calendar of deadlines

Click the **Calendar** tab to see deadlines on a month grid:

- Overdue items are shown in red.
- Today is outlined.
- Use the arrows to move to the previous or next month, and **Today** to come back.
- Click any item to open it.

The same filters apply to the calendar.

How to add a deadline

1. Click **Add deadline**.

2. Enter a **Title**, for example *Renew pool operating permit with county*.
3. Choose the **Association**, or **Company-wide** for things like renewing your management license. Only owners, administrators and accountants can create company-wide deadlines.
4. Choose a **Category** and set the **Due date**.
5. Choose how it **Repeats: Does not repeat, Monthly, Quarterly** or **Annually**.
6. Optionally choose who it's **Assigned to**. They must be someone who can see the association.
7. Add a **Description** with instructions or links, then save.

How to complete, repeat and reopen deadlines

- **Complete:** click **Done** in the list, or **Mark done** on the edit page. The deadline moves to **Done** and records who completed it and when.
- **Repeat:** when a repeating deadline is marked done, the next one is added automatically, one month, quarter or year after the due date. It has the same title, association, category, assignee and description, so a monthly board package or an annual tax filing never falls off the calendar.
- **Reopen:** to undo a completion, filter by **Done**, open the deadline and click **Reopen**. Reopening and completing again does not create a duplicate of the next occurrence.
- **Delete:** open the deadline and click **Delete**.

The starter compliance calendar

Every new association gets a starter set of deadlines. Their dates are calculated from the association's fiscal year:

Deadline	When	Repeats
Prepare and adopt next year's budget	2 months before the fiscal year starts	Annually
File federal tax return (Form 1120-H or 1120)	15th day of the 4th month after fiscal year end	Annually
File state annual report / corporate renewal	About 3 months out (check your state's due date)	Annually

Deadline	When	Repeats
Hold annual owners meeting and board election	About 11 months out	Annually
Review insurance coverage before renewal	About 10 months out	Annually
Annual financial review or audit	4 months after fiscal year end	Annually
Update reserve study	3 years out	Does not repeat
Monthly financial package to the board	Mid-month	Monthly

Important: Deadlines and notice periods vary by state and by each association's governing documents. Treat these dates as a starting point: edit each one to match the association's bylaws and your state's rules, and add any others the association needs.

What else shows up as coming due

The **Coming due** card on the dashboard, and your AI assistant's deadline list, combine deadlines from across HOA Manager:

- open **Deadlines & tasks**
- **Insurance** policies expiring within 60 days
- **Contracts** that are ending or auto-renewing
- **Architectural review** decisions due
- vendor **certificates of insurance** that are expiring

Only items from **Deadlines & tasks** can be marked **Done** here. Clear the others by updating the policy, contract, request or vendor they come from.

AI assistants

You can connect an AI assistant (Claude, ChatGPT, Microsoft Copilot, Cursor or any other app that supports the **Model Context Protocol**, MCP) to HOA Manager. Once connected, you can ask it questions in plain language and it finds the answers in your data:

- "What's coming due for Oak Ridge this month?"
- "Which owners at Willow Creek are more than 60 days behind?"
- "Prepare my report for Thursday's board meeting."

With permission, the assistant can also open work orders, add notes and manage deadlines for you.

How the connection works

MCP is a standard way for AI assistants to use other software. HOA Manager is an *MCP server*: it offers the assistant a set of tools such as "list work orders" or "receivables aging", and the assistant decides which ones to call to answer your question.

The key points:

- **It acts as you.** The assistant connects with a personal **AI access token** you create. It sees only your management company and only the associations in your portfolio, and it can only do what your role allows.
- **Read only, or read and update.** Each token is one or the other, and your company can limit or turn off AI access altogether.
- **Everything is logged.** Changes made by an assistant appear in the **Activity log** under your name, marked "(via AI assistant)".
- **No surprises for residents.** Assistants can't post charges or payments, approve invoices, email owners, or publish to an HOA's portal on their own.

Company policy: off, read only, or read and update

An owner or administrator sets the company-wide policy in **Company settings**, in the **AI assistants (MCP)** card.

Working in

All associations (3)

Dashboard

Associations

Deadlines & tasks

COMMUNITY

Units

Owners

Board members

Bylaws & governing docs

Amendments

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Budgets

Banking & GL

Reports

RECORDS

Vendors

Contracts

Insurance

Reserve studies

Resale & estoppel

Documents

COMPANY

Neighborhood links

Staff

Company settings

Email sending

Activity log

Find an association, owner, address, work order...

oo

Company settings

Your company profile, unit registration GUID and how neighborhood connection requests are handled.

Unit registration GUID

HOAs running the Neighborhood app use this GUID, with this server's address, to ask to connect to Demo Management. It only lets them request a connection; each request still needs approval unless auto-approve is on.

12d55a35-d05d-4675-9a69-0746d242732e

Copy

Issue a new GUID

Server address: http://localhost:8001

Company profile

Company name *

Demo Management

Legal name

Demo Management Group, LLC

Email *

office@demo-management.test

Phone

(478) 555-0100

Website

https://demo-management.test

Management license #

CAM-GA-004512

State CAM or management company license, if required.

Address

400 Cherry St, Suite 210

Address line 2

City

Macon

State

GA

ZIP

31201

Time zone *

America/New York

Neighborhood connection requests

☐ Approve requests automatically and create a new association for each

Leave this off if you want to check each HOA before it connects. Invite codes are always approved automatically.

Security: two-step sign-in (MFA)

Applies to everyone who signs in to Demo Management. Staff set up their own second step under Two-step sign-in; anyone covered by a requirement is asked to set it up at their next page load.

Policy *

Optional: each person can turn it on

Remember a verified device for (days) *

30

0 asks for a code at every sign-in.

Allowed methods

☒ Authenticator app ☒ Email code

When required, require it for

☐ Owner ☐ Administrator ☐ Community Manager ☐ Accountant ☐ Staff ☐ Read-only

Leave all unticked to require it for everyone.

AI assistants (MCP)

Staff can connect AI assistants to HOA Manager with personal tokens from AI assistants. Assistants act as the person: same associations, same role.

Allow AI assistants *

Read and update: assistants can also open work orders, add notes and manage tasks

Save settings

Active AI access tokens (0)

No one has connected an AI assistant

Company settings, including the AI assistants policy and the list of active tokens

1. In the sidebar, under **Company**, click **Company settings**.

2. In **AI assistants (MCP)**, choose **Allow AI assistants**:

- **Off: AI assistants cannot connect.** Existing tokens stop working immediately.
- **Read only: assistants can look things up.** Update tools are hidden, even for read-and-update tokens.
- **Read and update: assistants can also open work orders, add notes and manage tasks.**

This is the default.

3. Click **Save settings**. The change is recorded in the activity log.

Below the form, **Active AI access tokens** lists every token in your company: whose it is, its access, when it was last used and when it expires. Administrators can **Revoke** any of them, for example when someone leaves.

How to create an AI access token

The screenshot shows the 'AI assistants' page in the HOA Manager application. The left sidebar contains navigation links for various HOA management tasks. The main content area is titled 'AI assistants' and explains the purpose of connecting an AI assistant. It provides instructions on how to connect via a Server URL and Authentication Header, and includes a Claude Code snippet for setting up the MCP client. A 'Create a token' form is on the right, with fields for Name, Access (Read only), and Expires after (90 days). Below the form, a 'What an assistant can do' section lists permissions: Look up (associations, units, owners, work orders, violations, ARC requests, meetings, receivables and aging, income statements, budget vs actual, vendors, deadlines, bylaws and amendments), Update (update tokens only) (open work orders, change their status, add notes, add and complete deadlines), and Never (post charges or payments, approve invoices, email owners, publish to the HOA portal on its own, or see other companies' data). At the bottom, a 'Your tokens' table shows a single token named 'Live check ...jguol5' with 'Read only' access, used '14 minutes ago', expiring on 'Oct 24, 2026', and with a 'Revoked' status.

AI assistants

Connect an AI assistant (Claude, ChatGPT, Copilot or any MCP client) to HOA Manager. It works as you: it sees only your company and your associations, and it can only change what your role allows.

How to connect

Server URL: `http://localhost:8001/mcp` [Copy](#)

Authentication: **Header** `Authorization: Bearer YOUR_TOKEN`

Claude Code

```
claude mcp add --transport http hoa-manager http://localhost:8001/mcp --header "Authorization: Bearer YOUR_TOKEN"
```

Claude Desktop, Cursor, VS Code and other MCP clients

```
{
  "mcpServers": {
    "hoa-manager": {
      "type": "http",
      "url": "http://localhost:8001/mcp",
      "headers": {
        "Authorization": "Bearer YOUR_TOKEN"
      }
    }
  }
}
```

Copy configuration

Your assistant can then answer questions like "What's coming due for Oak Ridge this month?", "Which owners are more than 60 days behind?" or "Prepare my report for Thursday's board meeting", and, with an update token, open work orders, add notes and manage deadlines. Every change shows in the activity log under your name.

+ Create a token

Name *

Where you'll use it, e.g. "Claude on my laptop".

Access *

Read only

Expires after *

90 days

[Create token](#)

What an assistant can do

Look up: associations, units and owners, work orders, violations, ARC requests, meetings, receivables and aging, income statements, budget vs actual, vendors, deadlines, bylaws and amendments.

Update (update tokens only): open work orders, change their status, add notes, add and complete deadlines.

Never: post charges or payments, approve invoices, email owners, publish to the HOA portal on its own, or see other companies' data.

Your tokens

NAME	ACCESS	LAST USED	EXPIRES	STATUS
Live check ...jguol5	Read only	14 minutes ago	Oct 24, 2026	Revoked

The AI assistants page with connection instructions and the token form

1. Click your initials at the top right of the screen, then **AI assistants**.
2. In **Create a token**, give it a **Name** that says where you'll use it, for example *Claude on my laptop*.
3. Choose the **Access**:
 - **Read only**: the assistant can look things up.
 - **Read and update**: it can also open and update work orders, add notes and manage deadlines. This option is only offered when your company allows updates and your role can edit records.

4. Choose when it **Expires after: 30 days, 90 days, 1 year** or **Never**.
5. Click **Create token**.
6. **Copy the token now**. It starts with `hoam_` and is shown only once. HOA Manager stores only a fingerprint of it, so it can't show it to you again. If you lose it, revoke it and create a new one.

Important: Treat the token like a password. Anyone who has it can use HOA Manager as you, within the token's access. Don't paste it into shared documents or chats.

How to connect your AI assistant

The **How to connect** card on the AI assistants page shows the **Server URL** (your HOA Manager address followed by `/mcp`) and ready-to-paste settings. Right after you create a token, the settings already include it.

The assistant authenticates with the header:

```
Authorization: Bearer hoam_...your token...
```

Claude Code

Run the command shown under **Claude Code** in a terminal. It looks like this:

```
claude mcp add --transport http hoa-manager https://your-hoa-manager.example.com/mcp --header "Au
```

Claude Desktop, Cursor, VS Code and other MCP clients

Click **Copy configuration** and paste it into your client's MCP settings file. For Claude Desktop, that is **Settings** → **Developer** → **Edit Config**. The configuration has this shape:

```
{
  "mcpServers": {
    "hoa-manager": {
      "type": "http",
      "url": "https://your-hoa-manager.example.com/mcp",
      "headers": {
```

```
        "Authorization": "Bearer hoam_..."
      }
    }
  }
}
```

Restart the client. "hoa-manager" then appears in its list of tools or connectors.

Note: The "custom connector" features inside the claude.ai and ChatGPT websites need an OAuth sign-in, which HOA Manager doesn't offer yet. Use a desktop, IDE or command-line client that lets you add an `Authorization` header.

For IT: running the server locally

AI tools installed on the HOA Manager server itself can start a local (stdio) MCP server instead of using the web address. Set the token in the environment and point the client at:

```
HOA_MCP_TOKEN=hoam_... php artisan mcp:start hoa-manager
```

Without a valid token, the local server offers no tools.

What an assistant can look up

Tool	What it gives the assistant
List associations	Your associations with ids, status, unit counts, balances due, open work orders and portal connection.
Get association	One association in detail: profile, management agreement, assessments and late fees, reserve fund, board, managers, counts, what's coming due.
Portfolio summary	Dashboard numbers for everything you manage, or one association, plus the next 60 days of deadlines.
Search records	Find associations, units, owners, work orders, violations and vendors by name, address, email or number.
Get unit	A home or condo with owners and contacts, tenant, balance with aging, recent ledger entries, collection case, work orders, violations and ARC requests.

Tool	What it gives the assistant
List work orders / Get work order	Open jobs, most urgent first, and one job's full details and note history.
List violations	Open covenant violations with deadlines, fines and hearing dates.
List ARC requests	Architectural requests awaiting a decision, with overdue reviews flagged.
List meetings	Upcoming meetings, or past ones with minutes and whether quorum was met.
Receivables aging	Owner balances by age, with totals and the highest balances.
Income statement	Income and expenses by GL account and fund for a date range.
Budget vs actual	Each budget line against actual results, with variance and the suggested per-unit assessment.
List vendors	Vendors with contact details and compliance problems.
List deadlines	Everything coming due or overdue, with task ids.
List governing documents	Bylaws, CC&Rs and rules with current versions, amendment requirements and amendments in progress.

The assistant can also read three reference pages: who you are and what you can access; the valid status and category values; and a guide to HOA management duties.

What an assistant can change

These tools appear only with a **Read and update** token, when your company allows updates and your role can edit records:

- **Create work order:** opens a work order for an association, optionally for a unit and assigned to an active vendor.
- **Update work order status:** completing requires resolution notes. If the work order came from the HOA's Neighborhood app, the resident sees the update on the portal.
- **Add work order note:** notes stay with your team unless you ask the assistant to share them with HOA staff or the household.
- **Create task:** adds a deadline, optionally repeating and assigned to a colleague.

- **Complete task:** marks a deadline done; repeating ones roll forward automatically.

Good assistants confirm with you before changing anything. The server tells them to.

Example questions

- "Give me a portfolio summary and tell me what's overdue."
- "Which units at Oak Ridge owe more than \$500, and how old is the debt?"
- "Show me open emergency and high-priority work orders."
- "What does it take to amend Willow Creek's bylaws, and where is the lease amendment vote?"
- "Which vendors have expired insurance certificates?"
- "How is Oak Ridge doing against its budget this year?"
- "Open a high-priority work order at Oak Ridge: streetlight out at the front entrance." (update token)
- "Mark the monthly board package deadline for Willow Creek done." (update token)

Built-in prompts

HOA Manager offers three ready-made prompts that tell the assistant exactly which tools to use and what to produce. In most clients they appear as slash commands or in a prompt menu.

Prompt	What you get
Board meeting prep (association)	A one-page manager's report (financials, delinquencies, maintenance, compliance, ARC, deadlines), a draft agenda and the motions the board should vote on.
Delinquency review (association)	A table of delinquent accounts with a recommended next collection step for each, one stage at a time, flagging what needs board approval.
Draft owner notice (association, topic)	A short, plain-language notice to all owners with a subject line and your company's contact details, ready for you to review and send.

How to revoke a token

1. Open **AI assistants** from the account menu.
2. In **Your tokens**, click **Revoke** next to the token and confirm.

Any assistant using it is disconnected at its next request. Tokens also stop working when they expire, when your account is deactivated, when your company turns AI access off, or when your company is suspended.

Administrators can revoke anyone's token from **Company settings** → **Active AI access tokens**.

Security notes

- **Scope:** an assistant works through your account: your company, your associations, your role. Other companies' data is never reachable.
- **Audit:** changes are logged in the **Activity log** under your name with "(via AI assistant)".
- **Rate limit:** each token can make up to 120 requests a minute.
- **Confidentiality:** owners' personal details are confidential. Use them to help you manage the association, and don't paste them into content meant for all owners. The assistant is told the same.
- **Your AI provider:** what you share with an AI assistant is also governed by that provider's terms. Check that your company is comfortable with them before connecting.

Platform administration

This chapter is for the **platform operator**: the person or team running this HOA Manager installation for many management companies. Management company staff can skip it.

A **platform admin** account doesn't belong to any management company. It sees the list of every company on the platform and controls who can join, but it never sees a company's associations, owners or financial records.

How to create a platform admin

Platform admins are created from the server's command line, not from the web interface.

1. Sign in to the server and go to the HOA Manager directory.
2. Run:

```
php artisan platform:admin you@example.com --name="Your Name"
```

3. The command prints a temporary password. Sign in with the email and that password, then change the password under **My profile**.

Running the command again for the same email resets that platform admin's password. The command refuses an email that already belongs to a management company's user.

Tip: Turn on two-step sign-in for platform admin accounts. Open the account menu, then **Two-step sign-in**. Platform admins aren't covered by any company's policy, so it's up to you.

The companies list

When a platform admin signs in, they land on **Management companies**.

PLATFORM

Companies

PA

Management companies

Every company registered on this platform.

Companies
2

Associations
4

Active neighborhood links
1

✉ Invite a management company

Company name *

Company email *

State

Owner's name *

Owner's email *

They get an invitation to set a password.

Create and send invitation

🔒 Public registration

• Invitation only

The sign-up page asks people to use their invitation email or contact support@str8in.com.

Open public registration

COMPANY	REGISTERED	USERS	ASSOCIATIONS	LINKS	STATUS
Demo Management office@demo-management.test	Oct 24, 2026	7	3	1	• Active
Test Company mashman@str8in.com	Oct 23, 2026	1	1	0	• Active

The platform admin's list of management companies, with the invite form and registration switch

- **The summary at the top** counts **Companies**, **Associations** and **Active neighborhood links** across the whole platform.
- **The table** lists every company with when it was **Registered**, its number of **Users**, **Associations** and active **Links**, and its **Status**. Use the search box to find a company by name or email.
- **Each company's page** lists its users (name, email and role) and its associations (unit count and status). Click a company's name to open it.

How to invite a management company

Use this when public registration is closed, or when you're onboarding a company yourself.

1. On **Management companies**, find the **Invite a management company** card.
2. Enter the **Company name**, **Company email** and, optionally, the **State**.
3. Enter the **Owner's name** and **Owner's email**. This person becomes the company's first user, with the **Owner** role.
4. Click **Create and send invitation**.

HOA Manager creates the company and issues its unit registration GUID. It then emails the owner an invitation with a link to set a password. From there, the owner sets up the company themselves: company settings, staff, associations and Neighborhood connections.

Note: The invitation link expires after the standard password-link lifetime. If it has expired, the owner can use **Forgot password?** on the sign-in page with the same email.

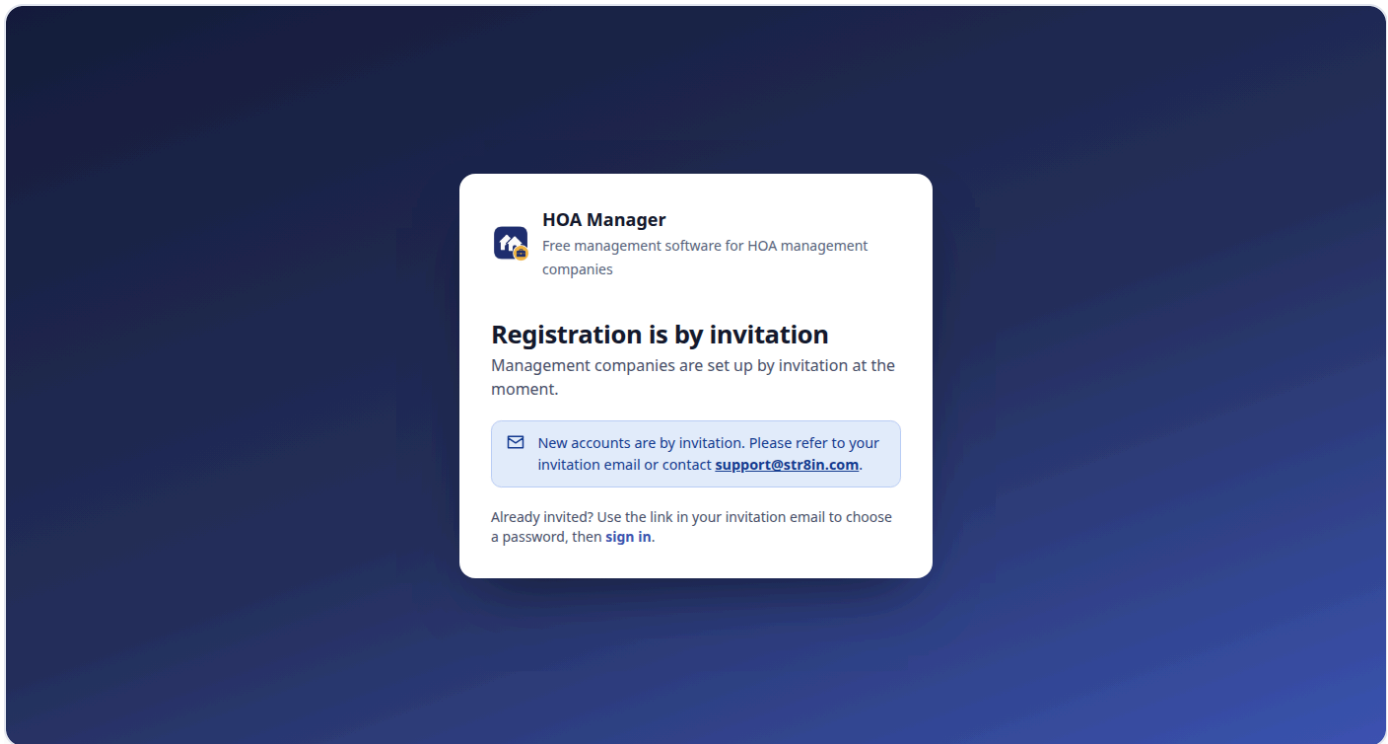
How to open or close public registration

Public registration lets any management company sign up at `/register`. Closing it makes the platform invitation-only.

1. On **Management companies**, find the **Public registration** card. It shows **Open** or **Invitation only**.
2. Click **Close registration (invite only)** or **Open public registration**.

While registration is closed:

- The landing page, the sign-in page and `/register` stop offering sign-up.
- They show: "New accounts are by invitation. Please refer to your invitation email or contact support@str8in.com."
- Submitting the old sign-up form creates nothing.



The registration page while the platform is invitation-only

The support address comes from the `SUPPORT_EMAIL` setting in the server's `.env` file; it defaults to support@str8in.com.

Important: Running the database seeder (see [Demo data](#)) closes registration automatically. Reopen it here if you want public sign-up.

How to suspend or reactivate a company

Suspend a company when it should temporarily lose access, for example during a dispute or a security incident.

1. On **Management companies**, click the company's name.
2. Click **Suspend** and confirm.

While a company is suspended:

- its users are signed out and can't sign in
- its AI access tokens stop working
- its Neighborhood app connections stop accepting data

Nothing is deleted. To restore access, open the company and click **Reactivate**.

Demo data

A seeder can build a fully populated demo company, **Demo Management**. It is useful for training, sales demos and the screenshots in this manual. The demo includes:

- **Oak Ridge HOA**: connected to a Neighborhood app.
- **Willow Creek Condominiums**: not connected.
- **Cedar Point Townhomes**: onboarding, with an invite code out.
- A pending connection request from **Maple Grove HOA**.
- Records in every module: six months of billing, payments, late fees and collections; budgets; payables; vendors; contracts; insurance; reserve studies; estoppel requests; documents; meetings; ARC requests; governing documents and amendments; deadlines; and announcements.

How to run the seeder

```
SEED_USER_PASSWORD='choose-a-password' php artisan db:seed
```

- **Every demo account** (owner@, admin@, manager@, priya@, accountant@, staff@ and viewer@demo-management.test, plus platform@demo-management.test) gets the password you set in `SEED_USER_PASSWORD`. Without it, a random password is printed when the seeder finishes.
- **Running it again** leaves an existing demo company alone.
- **To rebuild just the demo company:**

```
SEED_RESET_DEMO=1 SEED_USER_PASSWORD='choose-a-password' php artisan db:seed
```

Other companies are never touched.

- **In production**, the seeder only closes public registration; it never creates demo data.

Important: The seeder always closes public registration. If you run it on a live platform

where companies sign up themselves, reopen registration afterwards.

How to regenerate this manual

The user manual you're reading is served from the same installation:

- **Online:** the searchable web version is at `/manual`.
- **PDF:** a downloadable copy is linked from the manual's pages.

Both are built from Markdown chapters in `resources/manual/`.

Refresh the screenshots

The screenshots are captured from the running app, signed in as the demo company's accounts. Make sure the demo data is seeded and the app is reachable at the manual's base URL (`MANUAL_BASE_URL`, default `http://localhost:8001`). Then run:

```
SEED_USER_PASSWORD='your-demo-password' php artisan manual:screenshots
```

To capture only some screenshots, add `--only=` with part of a file name, for example `--only=reserves`. The list of screenshots is in `resources/manual/screenshots.php`. The command refuses to run in production, because it relies on demo data.

Rebuild the PDF

After editing chapters or refreshing screenshots, run:

```
php artisan manual:pdf
```

This prints the whole manual (cover, contents and every chapter) to a PDF in `public/user-manual/`. Screenshots and the PDF need Google Chrome or Chromium on the server; set `MANUAL_CHROME_PATH` if it isn't on the default path.

Tip: The web version updates as soon as you edit a chapter. Only the PDF and screenshots need rebuilding.

Troubleshooting and FAQ

If something isn't working the way you expect, start here. If the answer isn't below, ask your company administrator. For problems with the platform itself, contact support@str8in.com.

Signing in

I can't sign in: "Those details do not match an active account"

- Check the email address and the password. Passwords are case-sensitive.
- Your account may have been deactivated. Ask your company owner or an administrator to check **Staff**.
- If your management company has been suspended by the platform operator, every user is signed out. Contact support.

"Too many sign-in attempts"

After five wrong passwords in a row from the same place, sign-in pauses briefly. Wait for the countdown in the message, then try again, or use **Forgot password?**

I forgot my password

1. On the sign-in page, click **Forgot password?**
2. Enter your email and click **Email reset link**.
3. Open the email and choose a new password. It needs at least 10 characters, with both letters and numbers.

For your privacy, the page says the same thing whether or not the email has an account.

My invitation link has expired

Invitation links expire for security. Go to the sign-in page, click **Forgot password?** and enter the email address you were invited with. You'll receive a fresh link. A company administrator can also click **Resend invitation** next to your name under **Staff**.

I lost my phone, or can't get my two-step sign-in code

1. On the two-step verification screen, enter one of your **recovery codes** instead of the 6-digit code. Each recovery code works once.
2. Using email codes? Click **Send a new code**. Codes expire after 10 minutes.
3. No phone and no recovery codes? Ask a company administrator to open **Staff** and click **Reset two-step** next to your name. You can then sign in with your password. If your company requires two-step sign-in, you'll be asked to set it up again.

After five wrong codes, verification pauses for five minutes.

Tip: After you set up two-step sign-in, store your recovery codes in a password manager. You can make a fresh set under **Two-step sign-in** at any time; doing so invalidates the old codes.

I'm asked to set up two-step sign-in every time I open a page

Your company requires two-step sign-in for your role. Finish the setup on the **Two-step sign-in** page, using an authenticator app or email codes (whichever your company allows), and the reminder stops.

Seeing the right data

I can't find an association (or its work orders, owners or bills)

- Check the **Working in** switcher at the top of the sidebar. If it shows a single association, every list is filtered to it. Choose **All associations** to see your whole portfolio.
- **Community managers, staff and read-only users** see only associations they are assigned to. Ask an owner or administrator to add you to the association's **Management team** (on the association's page) or to tick it on your **Staff** record.

Who can see and do what?

Role	Sees	Can change
Owner / Administrator	Every association	Everything, including company settings and staff
Accountant	Every association	Financials (billing, receivables, collections, payables, budgets, banking) and records
Community Manager	Assigned associations	Records and operations; approves invoices; manages Neighborhood links
Staff	Assigned associations	Day-to-day records; no financial posting
Read-only	Assigned associations	Nothing

Buttons for actions you can't take are hidden. If you reach one through an old link, you'll see "This action is unauthorized".

A page says "Not found" for a record I know exists

You're signed in to a different company, or the record belongs to an association outside your portfolio. HOA Manager deliberately answers "not found", so that other companies' records stay invisible.

Connecting HOAs (Neighborhood links)

An HOA says its connection request was refused or never arrived

- Check they used this server's address and your current **unit registration GUID**. Both are in **Company settings**.
- If someone clicked **Issue a new GUID**, requests using the old GUID are refused. Send the HOA the new one; existing connections keep working.
- Look under **Neighborhood links** → **Waiting for approval**. Requests stay there until someone with permission approves them, unless automatic approval is turned on in **Company settings**.
- To skip approval, create an **invite code** from the association's page. Codes work once and expire after 14 days.

Records stopped syncing from an HOA

1. Open **Neighborhood links** and the connection. Check:
 - **Last heard from:** when the HOA's app last contacted you. A **Quiet** badge means more than an hour.
 - **Last problem:** the most recent error, if any.
2. Click **Test connection**. If the HOA's app doesn't answer, it may be offline. Ask the HOA administrator to check their app.
3. Make sure the connection isn't **Paused**. If it is, click **Resume**.
4. Click **Request full sync** to ask the HOA's app to resend everything.

Updates I make don't appear on the HOA's portal

- Commands to the portal (work order updates, announcements, meetings, documents) retry automatically if the portal is briefly unreachable. Open the connection and look at **Commands sent to the neighborhood**: failed ones show their error and a **Retry now** button.
- Violations you create in HOA Manager are not sent to the portal, because the HOA's app numbers its own violations. Only updates to violations that came from the portal are sent.
- Notes marked **Our team only** never leave HOA Manager.

My changes to a unit or owner keep reverting

For connected associations, the HOA's Neighborhood app is the source of truth for houses, owners and board members. HOA Manager accepts your edits, but the next sync from the portal overwrites them. Make the change in the Neighborhood app instead, or ask the HOA administrator to.

Email

Emails aren't arriving

1. Check the recipient's spam or junk folder.
2. Open **Email sending** (under **Company** in the sidebar):
 - **Send from my email address:** mail only uses your address after you click the confirmation link sent to it. Until then it goes out from HOA Manager. Mail from your domain may also

be junked until your domain's DNS authorizes HOA Manager; the page explains the SPF change.

- **Send through my own mail server (SMTP):** the server is used only after a successful test. If it later fails, mail goes out through HOA Manager instead, and the error appears under **Last problem**. Click **Send a test** to check.

3. Sign-in codes, password links and invitations always come from HOA Manager, whatever your setting, so they're never blocked by a problem with your own mail server.
4. On a new installation, the platform operator must configure an outgoing mail server. Until then, email is written to a log instead of being sent.

Residents didn't get an announcement email

Announcements are emailed by each HOA's Neighborhood app, not by HOA Manager, and only when **Also email the HOA's members** was ticked. Check the announcement's **Delivery** card: **Not connected** associations received nothing.

Billing and financials

This month's assessments weren't charged

- Open **Billing** and check the assessment schedule:
 - Is it active?
 - Is its **Next run** date in the past?
 - Does it have an end date that has already passed?
- Billing runs automatically once a day. The platform needs its scheduler running, which is one cron entry on the server. If the scheduler isn't running, nothing automatic happens. In the meantime you can run billing by hand from **Billing**.
- Billing never charges the same unit twice for the same schedule and period, so a re-run only adds what is missing.

Late fees weren't added, or seem wrong

Late fees run daily after billing. A fee is added once per unit per billing period when part of that period's charge is still unpaid more than the association's grace period after its due date. Check

the late fee amount and grace days on the association's **Edit** page; a late fee of \$0 turns them off.

A balance or aging bucket looks wrong

- Payments always apply to the **oldest** unpaid charges first, so a recent payment may clear an old bucket rather than the current one.
- Online payments from the Neighborhood portal appear only once the payment is complete. A refunded portal payment is removed again.
- Look at the unit's ledger under **Receivables**: every charge, payment, credit and late fee is listed with a running balance.
- Only manually posted entries can be voided. Billing, late-fee and portal entries are corrected by posting a credit or adjustment.

An estoppel certificate shows an old balance

The certificate is a snapshot taken when you generated it. Click **Regenerate certificate** to take a new one.

The budget vs actual numbers don't match my bank statement

Budget vs actual counts:

- **income** when charges and late fees are posted
- **expenses** when vendor invoices are approved or paid, by invoice date

It doesn't use bank deposits. Differences in timing are normal. Reconcile the bank account under **Banking & GL** to compare the two.

AI assistants

My AI assistant can't connect, or says the token is invalid

- The token may have expired or been revoked, your company may have turned AI access off, or your account may be inactive. Create a new token under **AI assistants**.
- Make sure the client sends the header exactly as `Authorization: Bearer hoam_...`.

- Web-based connectors in claude.ai and ChatGPT aren't supported yet. Use a desktop, IDE or command-line client.

The assistant can't create work orders

Update tools only appear with a **Read and update** token, when your company's policy allows updates and your role can edit records. Read-only users and read-only policies get look-up tools only.

Glossary

Term	Meaning
Aging	Breaking an owner's balance down by how long it has been unpaid: current, 1–30, 31–60, 61–90 and 90+ days.
Amendment	A formal change to a governing document, adopted by the vote its amendment article requires.
ARC / ACC	Architectural Review (or Control) Committee, which approves changes to homes' exteriors.
Articles of incorporation	The state filing that created the association as a nonprofit corporation.
Assessment	The regular dues each owner pays the association, often monthly or quarterly.
Budget vs actual	Comparing each budget line to what was actually earned or spent.
Bylaws	Rules for running the association: board, officers, elections, meetings.
CC&Rs / Declaration	Covenants, Conditions and Restrictions: the recorded rules that run with each property.
Collections	The escalating steps for unpaid balances: reminder, late notice, demand letter, intent to lien, lien, attorney. A payment plan is an alternative.
Compliance calendar	The association's legal and practical deadlines: filings, renewals, meetings and audits.
Delinquent	An account with a balance past due.

Term	Meaning
Eligible votes	The number of votes that could be cast, usually one per unit.
Estoppel / resale certificate	A statement for a sale or refinance confirming the owner's balance, assessments, violations and other facts as of a date.
Fidelity / crime bond	Insurance against theft of association funds by board members, employees or the management company.
Fiscal year	The association's 12-month accounting year; it may not match the calendar year.
Fully funded balance	What the reserve fund should hold today for the wear already used up on its components.
Fund (operating / reserve)	Separate pools of money: operating for day-to-day costs; reserve for future major repairs.
GL account	General ledger account: a line in the chart of accounts, such as 4000 Assessment Income or 5500 Landscaping.
Governing documents	Articles, declaration, bylaws, rules and policies.
Instrument # / Book & page	The county recorder's reference for a recorded document.
Late fee	A charge added when an assessment remains unpaid after the grace period.
Lien	A legal claim against a property for unpaid assessments.
Management agreement	The contract between the association and your management company, including the fee.
MCP	Model Context Protocol: the standard AI assistants use to connect to HOA Manager.
Neighborhood app / portal	The HOA's resident app, which connects to HOA Manager through a Neighborhood link.
Percent funded	Reserve balance ÷ fully funded balance. Below 30% is weak; 70% or more is strong.

Term	Meaning
Quorum	The minimum participation required for a meeting or vote to count.
Recording	Filing a document with the county so it is part of the public property record.
Reserve study	An inventory of major components with their remaining life and replacement cost, plus a funding plan.
Special assessment	A one-time or temporary charge on top of regular assessments, often for a large repair.
Unit registration GUID	Your company's code that HOAs enter in their Neighborhood app to ask to connect to you.
Work order	A maintenance job, from a resident's portal request or opened by your team.