How to use this checklist

Score each feature area from 0-2 (0=missing, 1=partial, 2=complete). Total your score to compare platforms.
Focus on day-to-day workflows and time saved.

Accounting

- ☐ Fund accounting & reserves
- ☐ Automated assessments & late fees
- ☐ Bank feeds & reconciliation
- ☐ Budget vs actuals with drill-down
- ☐ Delinquency workflows & board-ready packets

Violations & Inspections

- ☐ Mobile photo capture with location/time stamp
- ☐ Auto-letter templates & fee schedules
- ☐ Escalation rules & appeal tracking
- ☐ Photo evidence & history by property
- ☐ Status visibility for staff/boards

ARC (Architectural Reviews)

- ☐ Online submissions with required fields
- ☐ Auto-routing & quorum rules
- ☐ Timestamped decision trail & comments
- ☐ Policy templates for common requests
- ☐ Resident notifications (approved/denied/more info)

Work Orders & Vendors

- ☐ Create from portal/mobile/email
- ☐ Assign vendors & SLA dates
- ☐ Track costs & before/after photos
- ☐ Aging & category reports
- ☐ Inventory/parts (if applicable)

Portals & Payments

- ☐ Resident & board portals with docs & announcements
- ☐ ePayments (ACH/card/auto-pay) with clear fees
- ☐ Auto-post to owner ledger/GL
- ☐ Facility bookings & amenity calendars
- ☐ Two-way messaging with permissions

Communications

- [ ] Email/SMS/push by role/list/property
- [ ] Emergency alert & email personalization name/address
- [ ] Read receipts/engagement metrics

Mobile Field Tools

- Offline capture & sync
- [ ] Quick-create for violations/work orders
- [ ] GPS/location context
- [ ] Reliable photo notes that never get lost

Reporting & Dashboards

- [ ] Real-time KPIs (collections, violations, ARC TAT)
- [ ] Export to PDF/CSV, scheduled delivery
- [ ] Filters by community/portfolio/date

Automation & Templates

- [ ] Violation letters & fee ladders
- [ ] ARC decisions & standard conditions
- [ ] Payment reminders & statements
- [ ] Recurring tasks & checklists

Security & Compliance

- [ ] Role-based permissions & MFA options
- [ ] Encrypted payments & data at rest/in transit
- [ ] Audit logs & regular backups
- [ ] High-uptime SLAs

Onboarding, Support & Scale

- [ ] Guided data import & training
- [ ] Role-based learning for boards/managers
- [ ] Fast support response times
- [ ] Transparent pricing that scales

Scoring Tip

0 = Missing, 1 = Partial, 2 = Complete. Aim for consistent 2s on the workflows you do every week: violations, ARC, work orders, monthly close, and resident communications.

Apple and Android Compatible

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