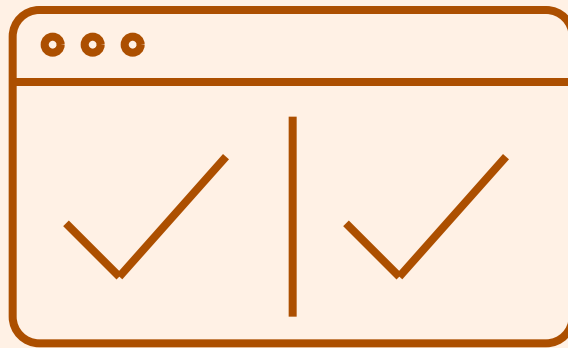


Choosing community association software: a board evaluation workbook

Compare software against real work, not the longest feature list. Use consistent demo scenarios, verify service scope and total cost, and test reporting, data export, privacy, and board continuity before deciding.



A PRACTICAL GUIDE + WORKSHEET

HOA, POA, and condominium boards comparing software options

Describe the work before comparing products

Identify the three workflows causing the most friction: collecting payments, preparing reports, answering residents, processing requests, finding records, or handing work to a new board. Write down the current steps and the failure point. This produces a useful evaluation question: "Can an authorized successor find this decision?" is more specific than "Do you store documents?"

List association type, unit or lot count, billing allocations, payment methods, required reports, user roles, and relevant integrations. Separate essentials from preferences. Include residents and the people who will administer the system, not only the person watching the sales demonstration. Confirm legal and accounting requirements with qualified advisers rather than asking a vendor to determine them.

Run the same scenarios with each vendor

Use fictional data and an identical short script. Create an owner charge, record a payment or credit, inspect a report, submit a maintenance request, retrieve a document, and demonstrate a board handoff. Ask the vendor to show the steps and permissions instead of only describing the outcome.

Record what was demonstrated, what was promised, and what remains unverified. If a feature requires an additional product, service, integration, or manual step, capture that dependency. A customer testimonial is useful experience, but it does not establish that the same feature or result is included in your proposed package.

Compare the full operating commitment

Ask about pricing by community size, setup, payment processing, messaging, optional services, training, support, renewal terms, cancellation, data retention, and export. Request written scope for bookkeeping or other professional support. Distinguish software functionality from someone performing the work for the board.

Assign a total-cost view that includes the association's expected transaction mix and volunteer effort. Do not assume all residents pay digitally or that all communications use one channel. Record the assumptions behind the comparison. A lower subscription can still require more manual effort, while an expensive option may include services the association does not need.

Verify data ownership, security, and a workable exit

The FTC's vendor-security guidance recommends asking service providers about how they protect information and handle security problems. Ask about roles, multifactor authentication, backups, support access, incident communication, and the contract. Do not enter real owner financial information into an evaluation environment without an authorized, appropriate process.

Test a sample export and ask what it includes: balances, transactions, documents, communication history, attachments, and identifiers. Confirm how the association obtains its data at termination and which items require additional work. A successful purchase decision includes an onboarding plan, an accountable administrator, and a way for a future board to continue operating.

A repeatable working process

- 01 Document the top workflows, legal or accounting needs, and decision criteria.
- 02 Use the same fictional demo script and scoring definitions for each vendor.
- 03 Verify scope, dependencies, transaction assumptions, and written pricing.
- 04 Review privacy, security, export, support, and contract questions.
- 05 Choose an owner for onboarding, acceptance testing, training, and the first-month review.

A worked example

Illustrative scoring approach: Rate each essential workflow as demonstrated, partly demonstrated, not demonstrated, or not applicable. Keep evidence beside the rating. If one vendor shows a complete owner statement but another only promises a future report, do not give both the same score. Record the uncertainty and request a follow-up before treating it as an available capability.

Adapt the example to your documents, approved authority, service scope, and local requirements.

Make the plan your own

Use this writing space with your team. Keep private owner information and account secrets in an appropriately restricted system.

Workflow / essential outcome / test scenario

Vendor / demonstrated evidence / unresolved dependency

Cost item / assumption / written source

Export or security question / answer / verification

Onboarding task / owner / acceptance result

Before you call it complete

- ☐ Essentials separated from preferences
- ☐ Demo data is fictional
- ☐ Same scenarios used for each vendor
- ☐ Scope and optional services written down
- ☐ Full cost assumptions compared
- ☐ Permissions and security questions reviewed
- ☐ Sample export inspected
- ☐ Onboarding and future handoff planned

Keep the evidence with the plan

Original EasyHOA editorial guide, edition 1.0. Published and sources consulted October 29, 2026. The workflows, fictional examples, and worksheets are our own; the sources below provide background and jurisdiction-specific reference material.

Federal Trade Commission: vendor security

Questions to ask a service provider about protecting data and responding to security incidents.

https://www.ftc.gov/system/files/attachments/vendor-security/cybersecurity_sb_vendor-security.pdf

Federal Trade Commission: cybersecurity for small business

Practical background on account protection, backups, and vendor security.

<https://www.ftc.gov/business-guidance/small-businesses/cybersecurity>

Minnesota Department of Commerce: rights and responsibilities

A state-specific example of board and owner roles; Minnesota rules do not automatically apply elsewhere.

<https://mn.gov/commerce/consumer/realestate/cic/rights-responsibilities.jsp>

Use the right professional for the question

This is general educational planning material, not legal, accounting, tax, engineering, or safety advice. State law, recorded documents, contracts, and association type can change the right process. Confirm legal and technical requirements with qualified advisers. Worksheets are not legal forms.

Choose one process to improve

Name an owner, agree on a next step, and review the result at your next working session. Preserve the sources and decisions so the next board can continue the work.

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