ENUMERATE CENTRAL
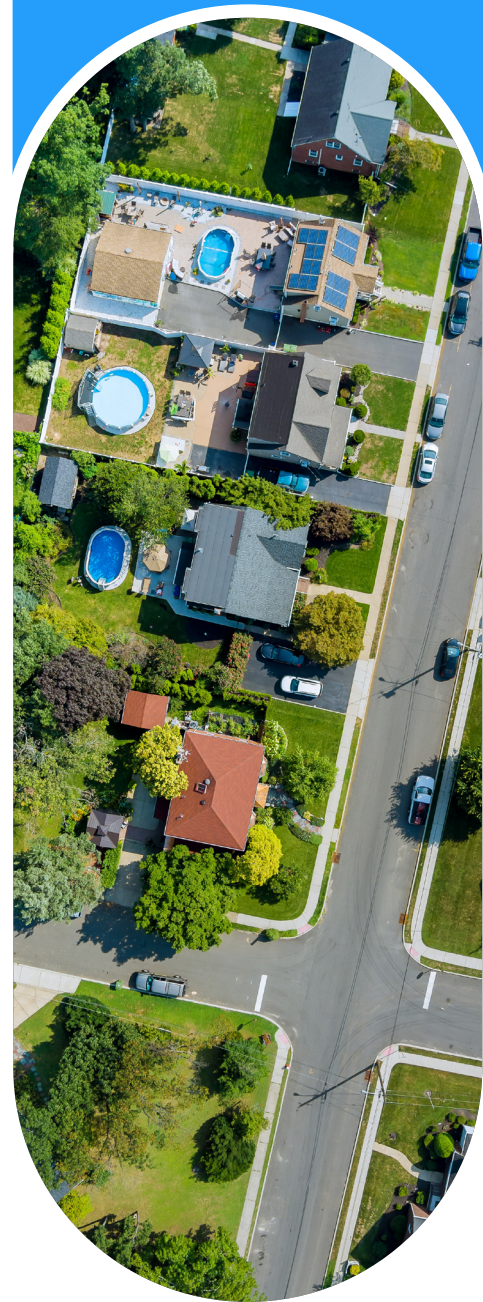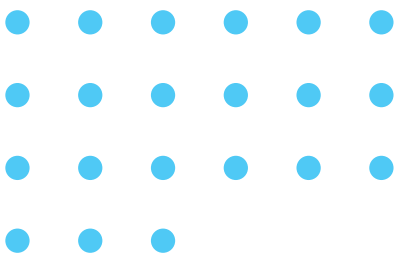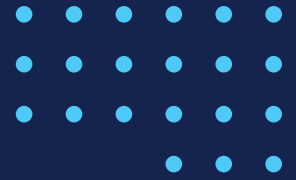
CASE STUDY

Fair Oaks Ranch Cuts Phone Calls by 50%, Saves Hours on Manual Tasks

Time for a Change

When Judy Bordman took on the role of business operations manager at Fair Oaks Ranch Homeowners Association (FORHA) in 2019, she brought a wealth of accounting experience to the job. Over the past 30 years, she has worked as a city treasurer, a hospital CFO, and even the treasurer of her own HOA.

In her new position, she and an assistant community manager were the only full-time staff serving FORHA, a self-managed association that oversees 3,910 single-family homes on more than 8,000 acres north of San Antonio, Texas. As its name implies, it was a former ranch. Eventually the ranch's owners decided to turn their property into a residential community and founded FORHA in 1975. Later, the community was incorporated into a city, and it overlaps three county lines.

Since she's the member of a small staff supporting an all-volunteer board for a large community, Judy knew she had to establish efficient processes to save time. And as an experienced accountant, she recognized that the right property management software could help her achieve that goal. With an eye toward the future, Judy decided that it was time for Fair Oaks Ranch to make a change.

Fair Oaks Ranch Homeowner Association

Fair Oaks Ranch Homeowners Association oversees 3,910 single-family homes on more than 8,000 acres north of San Antonio, Texas. Founded in 1975, the organization has an all-volunteer board and two fulltime employees to manage operations. Judy Bordman, the business operations manager, encouraged the board to upgrade from TOPS IQ to Enumerate Central. The conversion to the cloud-based software platform has reduced phone calls to the office by 50% and saved the staff hours by reducing manual tasks. It has also enabled seamless bank reconciliations, easy online payments for residents, better communications, and automated reporting.

From TOPS IQ to **CENTRAL** ENUMERATE

When Judy arrived at Fair Oaks Ranch, FORHA was using an older version of Enumerate software, TOPS IQ, a Windows-based system. In the past few years, however, advances in technology have far exceeded the capabilities of older software. "It was probably good in its day when it first came out," Judy said, "but we needed to upgrade our technology to better serve our residents and board members."

She recommended to the board that FORHA upgrade from TOPS IQ to Enumerate Central, a cloud-based software platform that is more user friendly and offers more advanced features. With the board's approval, the conversion to the new system began.

> **"I knew that there would be a lot of work required in converting our data to the new system, but I also knew that the benefits would far outweigh the work. I only wish we'd done it sooner."**

A Game Changer for Fair Oaks Ranch

With the upgrade in place by the fall of 2019, Judy and the Fair Oaks Ranch community immediately reaped the benefits.

For Judy, Enumerate Central has saved her time and streamlined processes. For the residents, the new owner access portal, a feature of the Enumerate Central platform, has offered tremendous convenience. Judy sums up the benefits in two words: game changer.

Seamless Reconciliations

Enumerate Central includes Payments, an accounts receivable and payable feature that has proven to be a big time saver for Judy.

Enumerate's prior version of Central required too many steps to verify when a payment was posted. Judy used to spend half a day on bank reconciliations every month. Now, with Central, the process is seamless, and bank reconciliations are automated taking Judy less than an hour.

"The great thing about Payments is it's clear when the payments are posted in the system," Judy said. "Plus, I get a report each day on which payments are made and posted. I'm able to reconcile my bank statements so much faster, because what's in Payments exactly matches what hits my bank."

Easy Online Payments

Judy also appreciates the convenience that Payments offers homeowners. Payments plus the built-in owner portal enables residents to pay their dues online through recurring credit card, debit card payments or ACH direct debits. Since the launch of Enumerate Central, about 25% of Fair Oaks Ranch residents now use the owner portal to pay their dues.

This is significant for Fair Oaks Ranch, which for a long time had mostly retired residents who still preferred to pay by check. Now younger, more tech-savvy families have moved into the community, and they are taking advantage of online payments.

75%
TIME SAVED
on monthly bank
reconciliations

25%
MORE RESIDENTS
pay dues online

50%
DECREASE
in phone calls
to the office

Improved Communications with Residents

The owner portal doesn't just facilitate payments. It also eases two-way communications among the board, the staff, and homeowners. Residents use the owner portal to make service requests as well as access the document library to view the property's bylaws, member directory, and the board's monthly agenda and financials.

Before Enumerate Central, Judy used the FORHA website to post documents, although a public-facing website wasn't a good solution for a private community. She also used a third-party HOA system. However, the streamlined processes and time saved Judy experienced with Enumerate Central eliminated the need to use those other systems for homeowner communications. "The document library on the owner portal has really helped us a lot. The owner portal, Payments, and the document library have cut down the number of phone calls to our office by 50%."

Reports Generated in a Flash

Judy loves the automated reporting capabilities of Enumerate Central. With TOPS IQ, she couldn't print reports. Instead, she had to pull out the information she needed and then cut and paste everything into a PDF.

The manual task of creating reports was a lot of work and increased the possibility of errors. But with Enumerate Central, Judy can generate a report in a flash and feel confident that it's accurate. "Being able to generate a statement on demand and just email it to the homeowner is a really nice Enumerate Central function," she said.

Judy also finds the Enumerate Central general ledger reports super helpful to review architectural fees, charges, and late fees. One particularly useful report for Judy provides information on resales and transfers. This is when a home is sold to a new homeowner. The seller pays a fee for the resale packet, which includes governing documents and other items that will be delivered to the new homeowner. Then the new homeowner pays a fee once the packet is transferred to them.

Prior to Enumerate Central, these fees were tracked as miscellaneous income. Judy had to take extra steps to account for these fees and report them to the board every month. Now resales and transfers are easily accounted for in an income statement in the general ledger, saving Judy time.

Simplified Overview of Properties

Using the Enumerate Central portfolio view, Judy has a great overview of Fair Oaks Ranch's 3,910 units.

The portfolio view, which is customizable for communities both big and small, comes in handy for Judy, especially when there are proposed changes to unit restrictions.

Fair Oaks Ranch has 65 different types of units with 65 different types of restrictions. These restrictions run the gamut, from outbuilding requirements to setbacks. Some units allow horses, while others prohibit dogs. RV parking restrictions vary too. Some homeowners are allowed to park an RV on the property, while others must hide their RVs from view. When there are proposed changes to those restrictions, it's a snap for Judy to communicate via email within Enumerate Central to all the homeowners of a particular unit type.

"The portfolio view makes it easy to get information, whether it pertains to one unit or a mass change to multiple units," Judy said. "I can create letters for that unit type, send out an email, and let everyone know of the proposed changes quickly and easily."

JUDY BORDMAN
FAIR OAKS RANCH

## The Future Looks Bright – with Enumerate Central

Upgrading to Enumerate Central has made a huge difference for Fair Oaks Ranch. It has saved Judy time in multiple ways, from report generation and bank reconciliations to fielding phone calls and communicating with the board and homeowners. Enumerate Central has also streamlined processes for the board, with easy access to monthly agendas and financials and as well as quick turnarounds on reports from Judy. And the community's residents have the convenience of Payments, document access, and online service requests. Judy definitely called it right — Enumerate Central has been a game changer.

Whether You Manage a Single Community or an Entire Portfolio –

You Can Do More With CENTRAL

Central Is an Easy to Use Software That Is Trusted by Thousands of Property Managers and Accountants

Your life is a windstorm of details: accounts payable and receivable, collections, violations, homeowner relations, service requests, vendors, work orders – you know the routine.

You need a solution that's designed specifically to help you better manage your community.
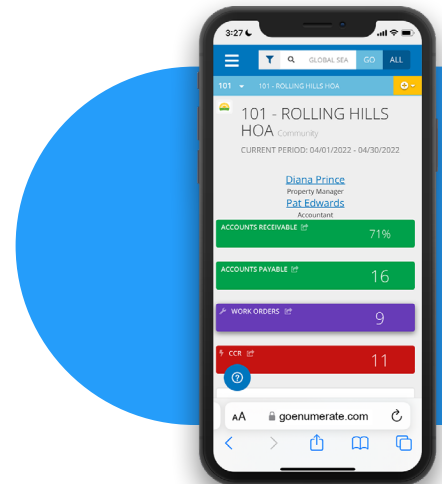
Get Funds Quicker
The powerful accounting features of Central makes Account Payables and Receivables effortless and it is completely customizable. It also includes Enumerate Payments which allows you to accept recurring payments safely and securely.

Easily Lookup Owner Info
The incredible management tools of Central gives you a quick snapshot of your entire portfolio. Within seconds, you can explore each community and easily access key information.

Reduce Phone Calls by 15%
Central provides state of the art communications through our Enumerate Engage. Homeowners can get updates on tickets, send questions, or review their account which reduces phone tag and saves you hours.

Save Up To 40 Hours Per Month
You can automate your workflow which reduces hours spent on manual processes. Handle violation management quickly and easily, right from your mobile device.

Do Your Job from Anywhere
Since Central is in the cloud, you can enjoy more freedom from the office. Central also allows you ro collaborate with your entire team at the same time from different places.

Impress Your Board Members
Our reporting engine allows you to create dozens of detailed reports quickly and efficiently. You can easily share documents with board members, staff and residents.

Let us count the ways.

You don't need five different solutions to manage one community. The Enumerate Suite has everything you need in one place.

Award-Winning Support at Your Fingertips.

In addition to the amazing features of Central, Enumerate offers our clients the industry's smartest and most helpful customer service:

• Industry-exclusive Customer Success Team staffed with PCAMs.
• A Quality Assurance team made up of CAM professionals.
• A dedicated, expert in-house Support Team.
• A standalone Implementation Team.

Other companies sell property management software.

We invented it.
Since 1985, more CAM professionals have trusted Enumerate than all other competitors combined. If you are looking for a technology partner that's dedicated to your success, then Enumerate is the clear choice.

Get a FREE Consultation.
Call today at 727-293-4599.

Are you looking for an easier way to do your job? Then you're a perfect candidate for a free phone consultation. We'll listen carefully to your needs and problems. Then we'll come up with expert ideas you can use right away to make improvements, boost productivity and banish your worries.

• We promise not to spam you.
• There's no obligation.
• It's 100% FREE.