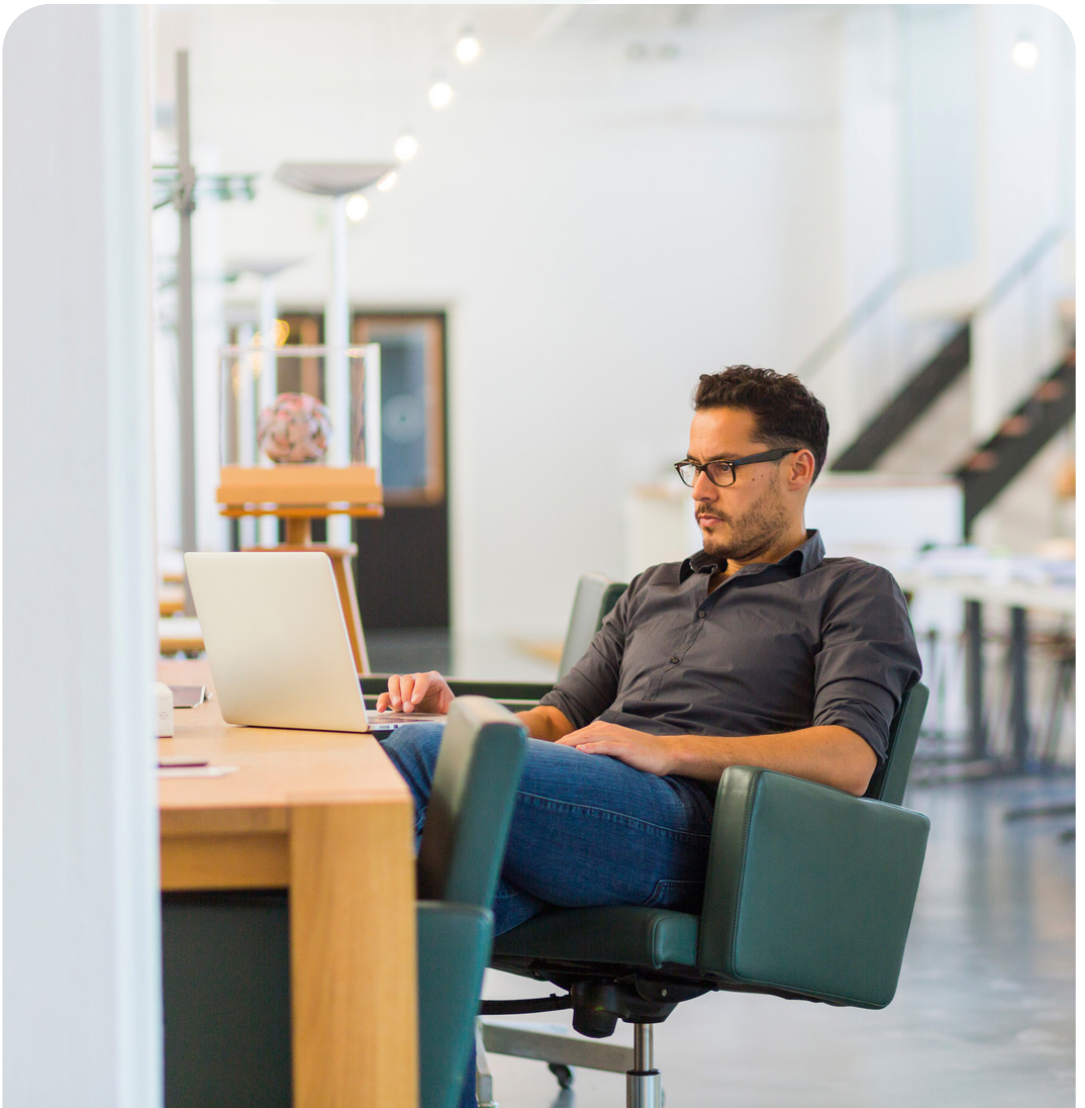# Save Time and Money by Going Paperless

A Community Association Manager's Guide

Introduction

If you're one of the many community association managers burdened by cumbersome paper processes, like collecting dues, processing vendor payments, tracking violations, and mailing important documents, it can be difficult to imagine switching to a fully paperless system.

When your processes are rooted in paper, your access to important documents, like invoices and community notes, is limited by how far you are from your filing cabinet. Plus, because all of your documentation is printed on paper, you increase the risk of losing or misplacing critical pieces of information and decrease efficiency due to the time it takes for employees to find what they need.

Converting to paperless association management is not only possible, but critical for protecting the continuity of your operations, keeping board members and homeowners satisfied, and simplifying your workload. It also makes it easier to access your data from anywhere at any time, boost efficiency, provide a better customer experience, and stay competitive.

30x

A study from QLS.com shows that using paper in your office can be up to 30 times the cost of the paper itself when you factor in paying employees, the time to print and file, and the paper that's recycled or thrown away.

57%

An AppFolio study found that 57 percent of community managers believed too many manual processes are slowing their growth.

Going Paperless Saves Time

Whether it's searching through the office or waiting until you return from on-site visits, the amount of time you and your team spend manually sifting through paper documents adds up fast. In fact, a QLS.com study showed that on average, an employee spends 18 minutes every time they look for information in filing cabinets.

When you have cloud-based software that allows you to complete requests, track to-do's, and find important documents all in one place, you significantly reduce wasted time while increasing efficiency. Let's look at some common association management processes that can be streamlined by going paperless.

18 min.

—— OR ——

35%

percent of their time

A study from QLS.com found that the average employee spends an average of 18 minutes (35 percent of their time) each time they look for information in filing cabinets.

Violation Management

When it comes to violations, an all-in-one cloud-based software allows you and your team to process violations from the field, upload images immediately from your smartphone, and format violation letters from anywhere at any time. No need to catch up when you return to the office. And because you can automate the process of follow up letters, you can focus more on providing a better customer experience and streamlining your workflow, all while reducing paper consumption.

Modern association management software also allows you to create automated violation follow up schedules for each community you manage, with specific letter templates and charges, and includes a violation management queue to generate letters in bulk, if needed.

Accounting

Moving away from paper processes sounds complicated and potentially a little worrisome when it comes to accounting. However, going paperless comes with major benefits, like streamlining your accounting away from difficult, manual tasks to automated systems that save time and headaches. Instead of utilizing paper bank statements to reconcile your finances, you can use a software that integrates with major banks to automatically reconcile your statements avoiding processing paper lockbox payments and manual bookkeeping.

This fully paperless method then records lockbox payments directly into the accounting feature of your software showing that when funds go into your bank account, they're immediately checked off proving the record occurred at your bank. The automatic account features also help your workflow become more centralized, and gives you the ability to check the status and history of your finances through the online portal at any time.

Another way to cut down on paper and save valuable time is to set up reports, like bank statements, accounting per board you manage, and reporting packets, in bulk via your software. Instead of printing reporting packets with write ups and bill approvals, and then sorting each paper document to bring to board meetings, you can create customized reports and email reports to board members with a few clicks. This saves you significant time, especially when it's time to send out annual packets.

You can customize specific reports, like showing accounting in cash or in accruals, and store all your documents in the online portal for easy future reference. It's like a digital filing cabinet that everyone on your team, plus designated viewers can access remotely.

Going Paperless Reduces Friction While Increasing Efficiency

With paper- and process-heavy responsibilities, like architectural requests and reviews, billing and invoicing approvals and payments, and necessary paper mailings, switching to cloud-based software is the key to reducing friction and increasing the efficiency of your operation. Let's explore how a few important processes look when you go paperless.

Architectural Requests and Reviews

Having required forms, specs, and samples sent electronically through the software for architectural requests and reviews helps homeowners through the process and allows them to submit further requests through the secure online portal. It not only reduces paper consumption, but homeowners can upload images and project specifications while you can add extra instructions, email homeowner documents to the architectural committee or board for review, and track all communication and completions in one place.

No more back and forth paper transactions that have to be mailed or dropped off in-person by the homeowner, board, or your team. With software that collects all your conversations in the online portal, including email and text, it's easy to see the current review status and follow up wherever you are.

Bill Approvals, Invoicing, and Payments

Although many association managers mail paper bill approvals, invoices, and payables to board members, or bring printed copies to meetings for review, this creates friction in paying invoices as well as extra lag time for vendors.

However, when you transition to cloud-based software, you simplify the approval and invoicing processes by centralizing communication, increasing workflow efficiency, and cutting down on bulky paper procedures. All your board members and homeowners need is an email address to sign up and log in.

Additionally, when you go paperless with a cloud-based system, homeowners can pay their dues securely online with via echeck (i.e. ACH from their bank account), or credit or debit card, and the funds are automatically deposited in your bank account, eliminating the need for you to deal with paper checks and deposit them. You no longer have to worry about collecting payments; once autopay is set up, every payment task is completed automatically each month.

Integrated Mailing Service

If you do have to send paper mail, possibly for legal reasons, switching to a paperless system allows you to mail documents, like statements, with or without payment coupons, violation letters, and PDFs in bulk to multiple communities or individual homeowners through an integrated mailing service within the software.

You don't have to waste time printing, prepping, and mailing. You'll be able to digitally track events to see when the mail is printed, sent, and processed for delivery. The logs for all your letters will be accessible online for you and your team to check in whenever necessary.

Prioritize Business Growth by Going Paperless

Industry trends continue to move toward mobility as a mandatory asset. By automating processes and providing your customers with instant services, you can stay competitive. AppFolio can help guide your business in the right direction, delight homeowners and board members, simplify your workload, and turn complicated paper processes into straightforward, effortless online procedures.

The mobile tools and access AppFolio's innovative software provides can help your business easily transition to paperless processes, while saving you time and money, increasing efficiency, and helping you deliver a remarkable customer experience. Learn more about how AppFolio can help you streamline your business here.