

Association & Homeowner Additional Information

Project Summary:

This project is to fill in the Association Additional Info and Homeowner Additional Information screen for each association

Benefits of Doing This:

- Association info will provide easily to customer support fielding phone calls.
- If after hours call service information at their fingertips
- You can use the fields and data for Merge Tags in Letter Templates
- Information normally stored in someone's head, sticky notes or filing cabinet can now be captured in one location
- Makes transitioning to a new manager easier
- Information is available on the app for managers on the go.

Questions to Consider:

- How much additional information do you have stored in your other system or Shared Drive?
- Do you have team members that can populate this information? Keep in mind this information can not be imported.

Approach and Details:

- Review the available fields and then determine if any additional fields need to be added
- To view all available Fields to review, you can export the list to excel from the Association/Homeowner Additional Info screen.
- Assign task out to non super users for each Association

Resources:

[Zendesk Article on Association Additional Info](#)

[Zendesk Article on Homeowner Additional Info](#)