



AppFolio Portal

Training
May 2023



AppFolio Portal Training

- The Solana HOA BoD's has decided to stop using the current Calendar system used to reserve the Clubhouse and will start using the AppFolio Portal instead. Not only will this improve the reservation process it will make it easier for the BoD to communicate with residents and to provide a better way to share documents with residents than is currently available.
- The address for the online version of the Portal is:
<https://westernskymanagement.appfolio.com/>
- The Portal is available for your phones on both the Apple App Store  and Google Play Store .
- The Effective date of this change is 10 AM on May 11th 2023.

How to get a Portal account

- If you do not have a Portal account, contact our Property Manager at:
- dpendergraft@hotmail.com or 360.678.1329 and ask him to send you a “Portal Activation Request”.

Home screen

HELLO
Joe Pancoast

Property Address PO Box 1168 - 1001, Oak Harbor, WA
98277 [Log Out](#)

Home

Your Current Balance

There is nothing for you to pay.

[Pay Now](#) [Set Up Autopay](#)

You have no current bills.

Upcoming Events

- Solana Office
Thursday, June 1, 2023 | 10:00 AM - 12:00 PM
- Solana Office
Thursday, July 6, 2023 | 10:00 AM - 12:00 PM
- Solana Office
Thursday, August 3, 2023 | 10:00 AM - 12:00 PM
- Solana Office
Thursday, September 7, 2023 | 10:00 AM - 12:00 PM
- Solana Office

- The first thing you will see is the Home screen
- You will also see the current status of your assessment payment and have an opportunity to create an Autopay **if you choose**
- You will also see a list of upcoming Calendar events

Payments

The screenshot shows a web application interface for a user named Joe Pancoast. The top navigation bar includes a greeting 'HELLO Joe Pancoast' with a notification bell icon, and the property address 'Property Address PO Box 1168 - 1001, Oak Harbor, WA 98277' with a 'Log Out' link. A dark sidebar on the left contains menu items: Home, Payments (highlighted), Calendar, Approvals, Amenities, Shared Documents, Insurance, Property Details, Account Profile, and Help. The main content area is titled 'Payments' and is divided into three sections. The first section, 'Your Current Balance', states 'There is nothing for you to pay.' and features a blue 'Pay Now' button and a 'Set Up Autopay' button. Below this, it says 'You have no current bills.' The second section, 'Account Ledger', asks 'Need more help understanding your balance?' and includes a 'View full account ledger' button. The third section, 'Past Payments', includes an information icon and states 'You have no payment history.'

- This is the Payments screen
- It will show your current balance and **if you choose** you can either pay the assessment using the app or set up an Autopay to pay your assessment automatically
- You can view your current account ledger to see all your previous charges and payments in the Account Ledger

Calendar Tab

The screenshot shows a user interface for a calendar. On the left is a dark sidebar with navigation links: HELLO Joe Pancoast (with a notification bell), Home, Payments, Calendar, Approvals, Amenities, Shared Documents, Insurance, Property Details, Account Profile, and Help. The main content area is titled 'Calendar' and shows a monthly view for May 2023. The calendar grid includes dates from 30th of the previous month to 3rd of the next month. Several events are visible: 'Solana O...' on Friday, May 5th; 'Combine...' on Thursday, May 11th; 'Canasta ...' on Wednesday, May 17th; 'Weed S...' on Thursday, May 18th; 'The pool...' on Friday, May 25th; and 'Administ...' on Saturday, May 26th. The date May 7th is highlighted in yellow. At the top right of the main area, the property address 'PO Box 1168 - 1001, Oak Harbor, W 98277' and a 'Log O' link are visible.

- This is the calendar
- You can view the details of a calendar event by clicking on it
- While viewing the event you will see the time of the event, who made the reservation, and if there are any documents or Zoom links, they will be attached to the event

Calendar Event

Weed Spraying **Announcements** ×

Audience
All Homeowners

Date and Time
Thursday, May 18 at 08:00 AM - 02:30 PM

Location
Courtyards

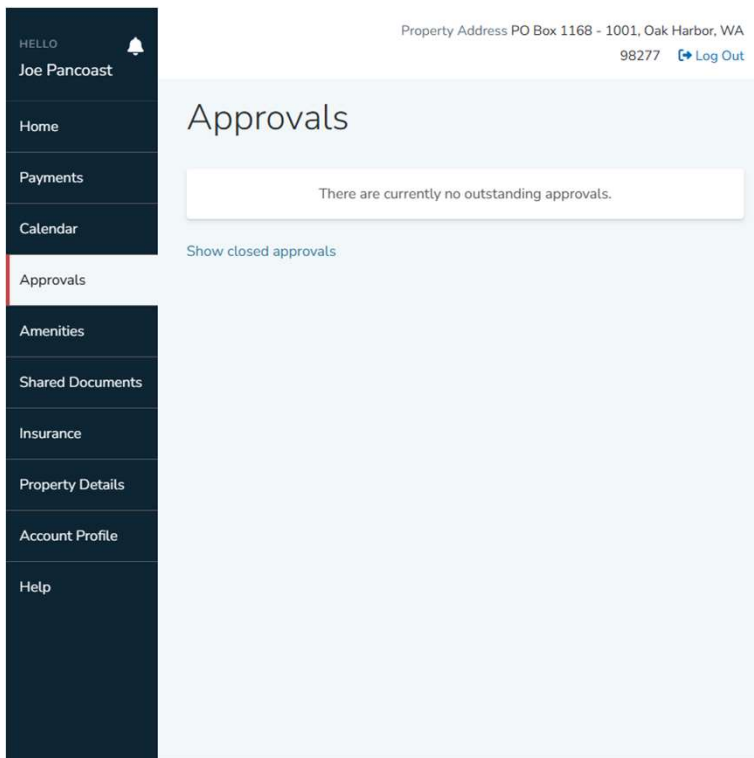
Description
Our Landscaping contractor will be spraying weeds in the Courtyards Common areas on May 18th.

- This is an example of an “Announcement” calendar event
- The other event types are: Administrative, Maintenance, Meetings, and Social events

Types of Calendar Events

- Announcements – Used to tell residents that something is happening
- Administrative – Used when the Association Secretary or Facilities Manager are working in the Clubhouse
- Maintenance – Used when maintenance activities are taking place in the Clubhouse or Pool
- Meetings - Used for all Association BoD, and Committee meetings or Association sponsored events
- Social Events – Used for all Lot/Homeowner sponsored events

Approvals Tab



- We currently are not using the Portal Approvals process

Amenities Tab

HELLO Joe Pancoast

Home

Payments

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Approvals

Amenities

Shared Documents

Insurance


Property Details

Account Profile

Help

Property Address PO Box 1168 - 1001, Oak Harbor, WA
98277 [Log Out](#)

Amenities



Clubhouse
Maximum Capacity - 92 people

Address 135 Solana Parkway,
Sequim, WA

Please remember:

All users of the clubhouse or
exercise room agree to:

1. Indemnify and hold harmless
the Solana Community
Association, its Board of Directors,
officers, or any affiliates thereof,
from liability for any injury or
harm sustained by use of the
facilities or any
furnishings/equipment therein.

- The only amenity that we are currently using, which can also be reserved, is our Clubhouse.
- This is where you can submit a reservation request by scrolling down the page until you see the “Reserve” button

Reserve Button

The screenshot displays a user interface for a property management system. On the left is a dark blue sidebar with navigation links: HELLO Joe Pancoast (with a notification bell), Home, Payments, Calendar, Approvals, Amenities, Shared Documents, Insurance, Property Details, Account Profile, and Help. The main content area at the top right shows the property address: PO Box 1168 - 1001, Oak Harbor, WA 98277, with a 'Log Out' link. The central text lists six numbered instructions for facility cleanup and preparation. Below these instructions, the 'Hours of Operation' (8:00 AM - 10:00 PM) and 'Flat Rate' (\$0.00) are displayed. A prominent blue 'Reserve' button is located at the bottom of the instruction list.

HELLO Joe Pancoast

Home
Payments
Calendar
Approvals
Amenities
Shared Documents
Insurance
Property Details
Account Profile
Help

Property Address PO Box 1168 - 1001, Oak Harbor, WA 98277 [Log Out](#)

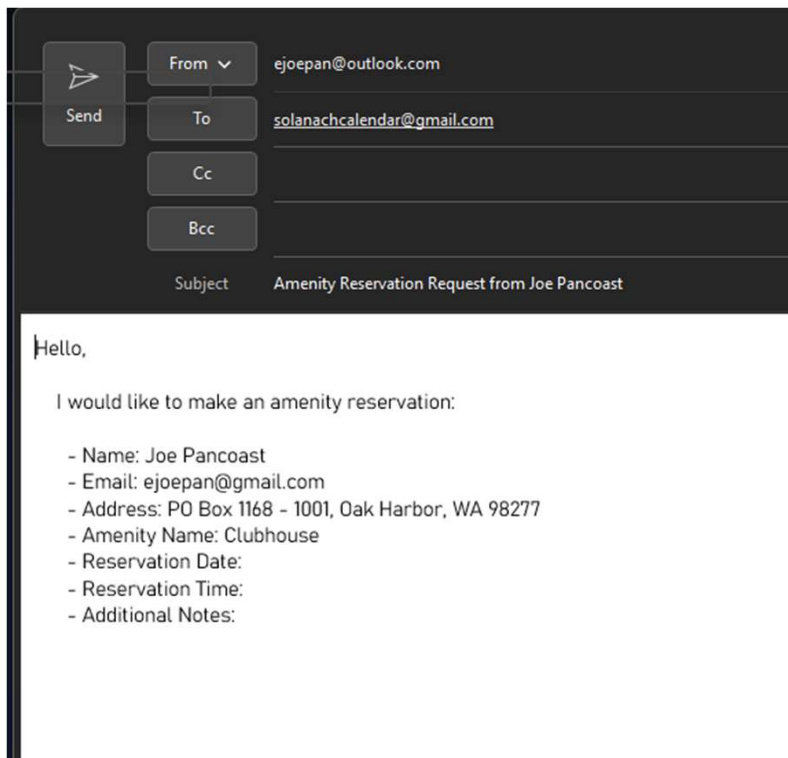
2. Clean the facility after use.
3. Remove any trash from the clubhouse and dispose it along with their residential trash.
4. Remind all event participants to leave two parking spaces vacant in front of the mailboxes to facilitate mail delivery by the Post Office and mail pickup by residents.
5. Ensure that all food related items (leftovers, crumbs, etc.) are removed from the Clubhouse to prevent rodent and insect infestations. Also, confirm that you have removed everything you had stored in the Refrigerator and Freezer.
6. Ensure that all doors are locked and all lights are turned off when your event has ended.

Hours of Operation
8:00 AM - 10:00 PM
Flat Rate
\$0.00

Reserve

- The “Reserve” button is at the bottom of the Amenities screen
- After reading the usage guidelines, you should press the “Reserve” button
- You will be asked which email application on your phone/PC you want to use, and a preformatted message will appear

Preformatted Reservation message



The image shows a screenshot of an email composition window. The header area is dark grey and contains the following fields:

- From:** ejoepan@outlook.com
- To:** solanachcalendar@gmail.com
- Cc:** (empty)
- Bcc:** (empty)
- Subject:** Amenity Reservation Request from Joe Pancoast

The main body of the email is white and contains the following text:

Hello,

I would like to make an amenity reservation:

- Name: Joe Pancoast
- Email: ejoepan@gmail.com
- Address: PO Box 1168 - 1001, Oak Harbor, WA 98277
- Amenity Name: Clubhouse
- Reservation Date:
- Reservation Time:
- Additional Notes:

- This is the preformatted “Amenity Reservation Request” form
- Do not change the “To” address
- Do add the Date and Time of your event
- Do add a description of your event in the “Additional Notes”
- If you are requesting a multi-day or recurring event describe your requirements in the “Additional Notes”
- You will receive an email within 48 hours that will tell you if your reservation was approved and posted.

Shared Documents Tab

HELLO
Joe Pancoast

Home

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Help

Property Address PO Box 1168 - 1001, Oak Harbor, WA 98277
Log Out

Shared Documents

Board member documents

Document	Shared On	
Estate Bylaws HOA.pdf	04/21/2023	Download

Recent board member documents

Document	Shared On	
Estate Bylaws HOA.pdf	04/21/2023	Download

Homeowner documents

Document	Shared On	
Approved Meeting Minutes		
Solana Courtyards Bylaws.pdf	04/22/2023	Download
Solana Estate Lots Bylaws.pdf	04/22/2023	Download
Estate Lots 2015_1321900.pdf	04/22/2023	Download
Solana Community Bylaws.pdf	04/22/2023	Download
Courtyards 2015_1321901.pdf	04/22/2023	Download
Community 2015_1321899.pdf	04/22/2023	Download

Recent homeowner documents

Document	Shared On	
AppFolio Folders.txt	04/27/2023	Download

- The BoD will share documents using this tab
- This shows that a member of the BoD will have a view of documents to review before BoD meetings.
- The Homeowner documents can be viewed by all Lot/Homeowners, note that there are “Folders” for Approved meeting notes, CC&R’s/Bylaws, and other topics

Insurance Tab

HELLO
Joe Pancoast

Property Address 611 Solana Parkway, Sequim, WA
98382 [Log Out](#)

Insurance

Upload Insurance Policy

You can upload your insurance policy from any provider and your policy information will be sent to your property manager.

Insurance Company Name *

Policy Number *

Policy Start Date *

Policy Expiration Date *

Add Proof of Insurance (Declaration or Certificate) * No files added

[Submit Policy Information](#)

- We do not currently collect Insurance information.

Property Details Tab

The screenshot shows a user portal interface. On the left is a dark sidebar with navigation links: Home, Payments, Calendar, Approvals, Amenities, Shared Documents, Insurance, Property Details (highlighted), Account Profile, and Help. The main content area is titled 'Property Details' and shows the following information:

HELLO
Joe Pancoast

Property Address PO Box 1168 - 1001, Oak Harbor, WA
98277 [Log Out](#)

Property Details

Address
PO Box 1168 - 1001
Oak Harbor, WA 98277

Contact Info
Solana Associations
Call
(360) 678-1329

Renter Info
 This unit is occupied by a renter

[Save](#)

- This tab contains the mailing address details for your Solana property.
- If you need to change your mailing address, contact our Property Manager at the number shown in the “Contact Info” section
- If you own more than one Lot in Solana, you will see an additional tab on your portal screen to “View Another Unit”. “Unit” is Portalspeak for “Solana Lot”. To see the details of your other property(ies) you should choose the address of the property you want to view on the “Choose another Unit” tab

Account Profile Tab

HELLO
Joe Pancoast

Home
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Help

Property Address PO Box 1168 - 1001, Oak Harbor, WA
98277 Log Out

Account Profile

Contact Information

Email address

Phone number

Address

Address 1 Address 2

City State Zip Code Country

Vehicle Information

Make Model

Color License Number Year

- Account Profile contains your personal contact information.
- We do not currently collect vehicle information.
- If you need to change any of your personal information, please contact our Property Manager at 360.678.1329

Help Tab

How to Access Portal / Sign In

Activate Your Account Online	+
Download the Mobile App	+
Sign In to Your Online Portal	+
Supported Browsers	+
Reset Your Password	+

Payments

Make a One-Time Payment	+
Set Up an Auto Payment	+
Edit or Delete an Auto Payment	+
How do I change my Auto Payment Maximum Limit?	+

- The Help Tab contains general information about how to use the AppFolio Portal.
- If you have any questions, please feel free to contact our Association Secretary solanasecretary@gmail.com or Facilities Manager fmsolanasequim@gmail.com for assistance.