

aldeahq.com

HOA Software Migration Kit

Your operational playbook for switching to Aldea HQ.

Checklists, email templates, and the realistic timeline — for the four platforms volunteer boards switch from most often.

Built for volunteer boards. Read it before your next board meeting.

READY TO START?

Spin up your free 14-day Aldea HQ trial at aldeahq.com/getting-started — no credit card required.

2026 Edition | Free Resource

aldeahq.com/blog/how-to-switch-hoa-software

Not legal advice. This guide is informational. Migration decisions intersect with state HOA statutes and vendor contract terms — consult a community-association attorney for your specific situation.

Per-Vendor Export Checklists

Pull everything before you cancel anything — the order matters.

Your contract with your current vendor probably gives them no obligation to hand back your data after cancellation. Pull a clean export *while your account is still active*, store it independently of any vendor, and only then start the cancellation clock. The menu paths below are the most common locations as of this edition — if a vendor has reshuffled their UI, the labels usually persist; ask their support team to confirm.

TownSq Most common for HOAs migrated from FirstService / Associa

- Member directory.** Admin → Directory → Export (CSV). Confirm unit numbers and email columns are included.
- Governing documents.** Documents → Bulk download, or right-click each file. There is no zip-all option in most accounts.
- Payment history.** Accounting → Reports → Transaction history, range = full association lifetime. Export CSV and PDF.
- Financial / audit records.** Accounting → Reports → General ledger, Aged AR, Balance sheet — export each as PDF for the audit trail.
- Communications archive.** Communication → Sent items → Export. Note: attachments do not export with the message body.

What to expect: *Document bulk download is the slow step — budget an evening. CSVs are clean; the communications export drops attachments, so download those separately.*

PayHOA Common for smaller self-managed associations

- Member directory.** Settings → Owners → Export to Excel. Includes unit, contact info, and billing status.
- Governing documents.** Documents → Select all → Download produces a zip. Verify file count matches the in-app count.
- Payment history.** Payments → Transactions → Export (CSV). For deposit-level detail use Bank → Deposit history.
- Financial / audit records.** Reports → Income statement, Balance sheet, GL — export each year separately as PDF.
- Communications archive.** Messages → Archive → Download. Email-only; phone/SMS logs export separately under Settings → Notifications log.

What to expect: *PayHOA's exports are the cleanest of the four. Most boards finish in under an hour. Double-check that the deposit history matches your bank — it usually does, but it's the one place reconciliation can lag.*

Per-Vendor Export Checklists (cont.)

Property-management platforms — extra care on the financial export.

Buildium Property-management platform; HOA module is one of several

- Member directory.** Rentals → Tenants & Leases → Export, or for HOAs Associations → Owners → Export (CSV).
- Governing documents.** Files → Filter by association → Bulk download. Files over 250 MB total are split into multiple zips.
- Payment history.** Accounting → Transactions → Export. Run separately for AR (assessments) and AP (vendor payments).
- Financial / audit records.** Accounting → Reports — export GL, Balance sheet, Income statement, Aged receivables, Bank reconciliation reports for each fiscal year.
- Communications archive.** Communications → Email history → Export. Inbound replies and resident-portal messages are separate exports.

What to expect: *The financial export is the careful step — Buildium's chart of accounts is granular, and you'll want every report as a PDF for the auditor. Set aside 2-3 hours total. Document bulk download is reliable but slow.*

AppFolio Enterprise platform — export tools live behind a support request for some accounts

- Member directory.** Reports → Tenant Directory (export to CSV). For HOA accounts: Owners → Owner Directory → Export.
- Governing documents.** Shared Documents → Select all → Download as ZIP. [Mario: verify — some account tiers require a support ticket]
- Payment history.** Reports → Receivables → Payment History, range = inception-to-date. Export to Excel.
- Financial / audit records.** Reports → Accounting — export Trial Balance, GL Detail, Income Statement, Balance Sheet per fiscal year as PDF.
- Communications archive.** Open a support ticket — bulk export of the communications log is not generally available in the UI as of this edition.

What to expect: *The longest of the four. Plan a full Saturday and expect 1–3 business days of back-and-forth with AppFolio support for the items that require a ticket. Quality of the CSVs is excellent; getting them out is the friction.*

One universal step: After every export, open the file. A zero-byte CSV is a failed export, not a small membership.

Member Communication Templates

Three emails, sent on a schedule, prevent 80% of the "I didn't know" calls.

Replace **[bracketed]** placeholders. Send from a board email address (not a personal one) so replies land somewhere the next treasurer can find them.

1 • Initial Announcement

Send 2 weeks before cutover

Subject: **[Community Name] is moving to a new community platform**

Hello [Community Name] homeowners,

On **[cutover date]**, our community will move from **[current platform]** to **Aldea HQ** — a community management platform that gives the board cleaner tools and gives you a faster way to find documents, pay assessments, and reach the board.

What this means for you:

- Until **[cutover date]**: continue using the current platform as normal.
- On **[cutover date]**: you'll receive an invitation email from `noreply@aldeahq.com` with your activation link. **Please add this address to your safe-sender list now** so the invitation doesn't land in spam.
- After cutover: all governing documents, your payment history, and the member directory will already be loaded — no action needed from you.

Questions? Reply to this email or reach **[board contact]** at **[board email]**.

— The **[Community Name]** Board

2 • Mid-Rollout Reminder

Send 1 week before cutover

Subject: **Reminder: your Aldea HQ invitation arrives [day of week]**

Hello [Community Name] homeowners,

Quick reminder that our move to Aldea HQ happens **[cutover date]**. Your invitation email will arrive that day from `noreply@aldeahq.com`. Activation takes about two minutes — click the link, set a password, you're in.

If you don't see the invitation by end of day: check spam, then email **[board contact]** at **[board email]** and we'll resend.

— The **[Community Name]** Board

3 • Login Instructions (Post-Cutover)

Send on cutover day, or the morning after

Subject: **[Community Name] is now on Aldea HQ — log in here**

Hello [Community Name] homeowners,

We're live on Aldea HQ. Your activation email went out from `noreply@aldeahq.com` earlier today.

Your community page: **[your-community.aldeahq.com]**

Once you're logged in, you'll find:

- **Documents** — CC&Rs, bylaws, rules, recent meeting minutes
- **Payments** — your assessment history and next payment due
- **Directory** — board members and how to reach them

Lost or didn't receive the invitation? Reply to this email or contact **[board contact]** at **[board email]**.

— The **[Community Name]** Board

Migration Timeline

Two realistic paths — pick the one that matches your board's cadence.

There is no single "right" timeline for migrating an HOA. The variable is your board, not the software. If you have one admin who can carve out a weekend, you can be live in two weeks. If you're a volunteer board that meets monthly, plan around your meeting schedule — it's slower, but it's the cadence that holds.

FAST PATH

2–3 weeks · admin-driven

WEEKEND 1

Admin commits ~4 hours of setup

Create the Aldea HQ workspace, import the member directory CSV, upload governing documents.

MON–WED

Stripe Connect verifies

Submit Stripe Connect application Monday morning. Verification typically lands within 1–2 business days.

THU

Send Email #1 (initial announcement)

Two weeks before cutover. Add the safe-sender note prominently.

WEEK 2, THU

Send Email #2 (reminder)

WEEK 3, SAT

Cutover & member invites

Send invite batch. Send Email #3.

WEEK 3+

First parallel-run cycle

Old platform stays in read-only access for ~30 days.

VOLUNTEER CADENCE

6–8 weeks · 3 board meetings

MEETING 1

Decide & select

Board motion to migrate. Identify the admin lead. Authorize the trial.

M1 – M2 (~3 WKS)

Admin setup

Workspace, directory import, doc upload, Stripe Connect submission. Run a 5-member pilot the week before M2.

MEETING 2

Announce & cutover

Board motion to authorize cutover. Send Email #1 that evening. Cutover the following weekend; send Emails #2 and #3 on the cadence above.

M2 – M3 (~3 WKS)

Parallel run

Both platforms accessible. Confirm payment-request smoke test. Chase the activation curve.

MEETING 3

Cancel old vendor

Board motion to cancel. Send cancellation notice (see next page).

The two bottlenecks that will determine your actual timeline

- **Stripe Connect verification (1–2 business days).** Submit it the same day you start admin setup, not the day before cutover. Verification can stall on missing documents — usually EIN, beneficial-owner ID, or a bank statement showing the association's name.
- **Member activation curve (2–4 weeks to 85–95%).** Day 1: ~50% activate. Week 1: ~75%. Week 4: 85–95% with one nudge. The last 5–15% requires individual outreach — phone calls, not emails.

Cancel & Verify

Close the loop with your old vendor — and confirm the new one is working.

Vendor cancellation script

Send only *after* all exports are complete and verified. Most contracts require written notice 30, 60, or 90 days before termination — your contract is the source of truth.

Subject: Notice of cancellation — [Community Name], account [account #]

To [Vendor] Account Services,

This message constitutes formal written notice of cancellation of [Community Name]'s service agreement with [Vendor], effective [effective date — calculated from the notice period in §[X] of our agreement].

The board confirms that all association data — member directory, governing documents, payment history, financial reports, and communications archive — has been exported and stored independently.

Please provide, in writing:

1. Your data-retention and deletion policy for our account after cancellation, including the retention window and the method by which data is destroyed.
2. Confirmation of the final billing date and any final invoice.
3. Written confirmation when our account has been closed.

Regards,

[Board contact], [Role]

[Community Name] Board of Directors

Note: Consult a community-association attorney for your specific contract terms before sending. Notice-period language varies and a missed clause can extend your obligation by a full renewal cycle.

Post-cutover verification — first 30 days

- Member-access spot check.** Three or more random members confirm they can log in and see their unit.
- Payment-request smoke test.** One test transaction completes end-to-end — request issued, paid by a board member, payout received.
- Document-availability audit.** CC&Rs, bylaws, rules, and current minutes are reachable from the member view.
- Records-retention compliance check.** Board confirms 7 years of exported records are stored independently of any vendor. *Per FL §720.303, CA §5210, and TX §209.005, the association — not the software vendor — is the legal record-keeper.*
- Stripe Connect status verified.** Payouts arriving on the scheduled cadence; no holds or verification flags.
- Member-activation rate.** Track to 85–95% by week 4. Follow up with stragglers by phone, not email.

Ready to start?

Spin up your free 14-day Aldea HQ trial — no credit card required. If you're stuck on an export step or a Stripe verification question, we'll get on the phone with your treasurer.

aldeahq.com/getting-started