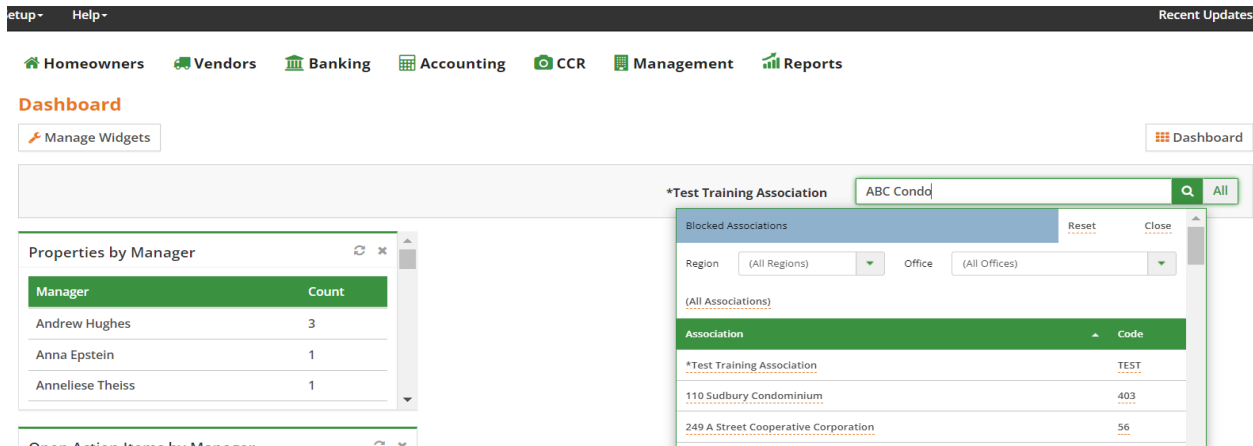


Set up Alerts/Reminders and Tasks under the File tab.

Users will be given access to the Test Association for training purposes. **To change from the *Test Training Association** upon first log in, or to switch your view to another property, either select the magnifying glass for a drop-down menu of your designated sites or start typing the property's name and you will be moved into that Association's page.



Properties by Manager

Manager	Count
Andrew Hughes	3
Anna Epstein	1
Anneliese Theiss	1

***Test Training Association** ABC Cond

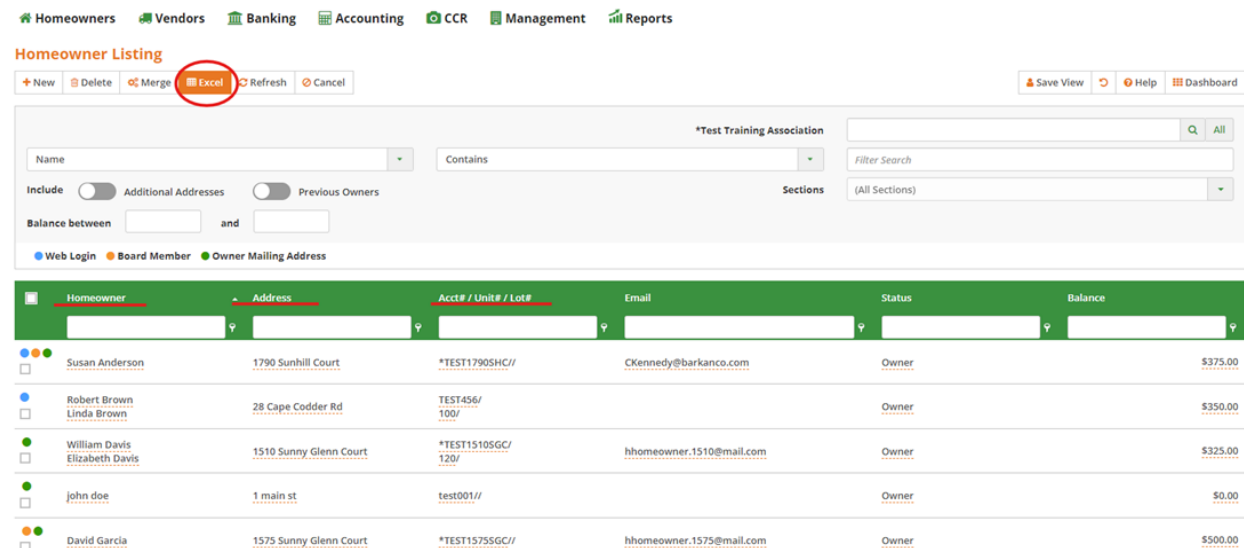
Blocked Associations

Region: (All Regions) Office: (All Offices)

(All Associations)

Association	Code
*Test Training Association	TEST
110 Sudbury Condominium	403
249 A Street Cooperative Corporation	56

You can **view homeowners** by last name, account number, address, status, etc. by going to Homeowners, Homeowners, and then clicking on the header that you want to sort by. You can then export the list by selecting the excel button:



Homeowner Listing

+ New - Delete Merge **Excel** Refresh Cancel

Save View Help Dashboard

***Test Training Association**

Name: [] Contains: [] Filter Search: [] Sections: (All Sections)

Include: ☐ Additional Addresses ☐ Previous Owners

Balance between: [] and: []

☐ Web Login ☐ Board Member ☐ Owner Mailing Address

Homeowner	Address	Acct# / Unit# / Lot#	Email	Status	Balance
Susan Anderson	1790 Sunhill Court	*TEST1790SHC//	CKennedy@barkanco.com	Owner	\$375.00
Robert Brown Linda Brown	28 Cape Codder Rd	TEST456/ 100/		Owner	\$350.00
William Davis Elizabeth Davis	1510 Sunny Glenn Court	*TEST1510SGC/ 120/	hhomeowner.1510@mail.com	Owner	\$325.00
john doe	1 main st	test001//		Owner	\$0.00
David Garcia	1575 Sunny Glenn Court	*TEST1575SGC//	hhomeowner.1575@mail.com	Owner	\$500.00

To quickly **view an owner's ledger**, simply click on the balance to be directed to their account.

Custom Reports – How to generate a homeowner mailing list to include account numbers and other additional information.



Create your own custom report under “Reports”, “Custom Reports”.

[Homeowners](#) [Vendors](#) [Banking](#) [Accounting](#) [CCR](#) [Management](#) [Reports](#)

Custom Reports

[+ New](#) [Delete](#) [Preview](#) [Excel](#) [Refresh](#) [Cancel](#) [Dashboard](#)

No Active Misc Info Fields

Report	Area	Type
--------	------	------

Hit “New”, select the type of report you want and give it a name. Select “View Parameters” and check off the information you want to include on the list and give them an order number.

Custom Report Parameters

[Save](#) [Cancel](#) [Dashboard](#)

Save as Homeowner Mailing List with Account #

Reports Custom Homeowner Information

[View Parameters](#)

Sort Order	Column Order	Column	Sort Order	Column Order	Column
1		☒ Primary Homeowner			☐ 2nd Homeowner
		☐ Address Type			☐ Street No
2		☒ Address 1			☐ Address 1 Plus Unit
3		☒ Address 2	4		☒ City
5		☒ State	6		☒ Zip

Add three additional parameters at the bottom by selecting “new”. Choose “Association Code”, “equals”, and then enter your property number (to run your report for a different property, just use the same report and enter another property number before exporting it).

☐	Association Code		equals		test
☐	Address Type		contains		physical
☐	Homeowner Status		does not contain		pr

[New](#) [Delete](#)

Hit save at the top and return to the bottom to enter another “new” parameter.



Hit “new” and then choose “Address Type”, “contains”, and “physical” to avoid including additional offsite addresses in your list. Hit save and enter the last parameter, “Homeowner Status” “does not contain” “Pr” to exclude any prior owners. Save and then cancel to return to the “Custom Reports” page.

Custom Reports

[+ New](#) [Delete](#) [Preview](#) [Excel](#) [Refresh](#) [Cancel](#) [Dashboard](#)

No Active Misc Info Fields

Report	Area	Type
☐ Custom Report	Standard	Custom Homeowner Information
☒ Homeowner Mailing List with Account #	Standard	Custom Homeowner Information

Select your report and either preview or export the report to Excel. It will then be downloaded to your browser for use.

Updating Board and Committee Members: Go to Set Up, Association Set Up, and then select your property. Scroll down to the bottom of the page and choose the Directory tab.

Post Payments

By Level

 Default Billing Type

Statement

[Info](#) [Addr](#) [Streets](#) [Sections](#) [Notes](#) [Directory](#) [Invoicing](#) [Users](#) [1099](#) [Sub Assoc](#) [Summary](#) [Misc](#) [Settings](#)

A list of current board members will be listed where you can delete or add a new member. Hit new and scroll down past the directories to fill in the new member’s information.

Name

Test User

(Test User : 123 Main St.)

Type

(Select Type)

Board / Committee

ACC/ARC/DRC Committee

Responsibility

Member

Address

123 Main St.

City / State / Zip

Duluth

GA

30096

Home Phone

Work Phone

Comment

Board Login

(Select Login)

Term Expires

Board Title

Birthdate

ID Number

FinCEN ID

Mobile Phone

Email

cinchomeownerapp+barkan@gmail.com,acaldon@

(separate with semicolon ';')



Once you type in the Board member's name or unit address, be sure to **click the search button** to link the Board member to the unit/account number so that their access in WebAxis will be updated. It will show the unit address in **orange** under the name if you've successfully linked it.

Name

Test User



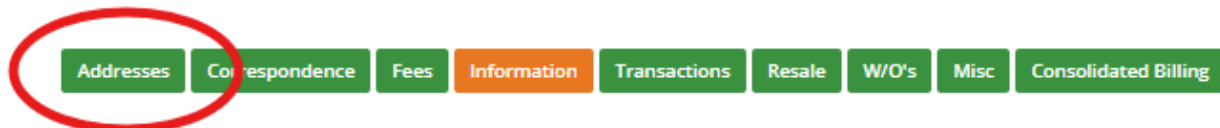
(Test User : 123 Main St.)

If the board member's name is not listed initially when you link the account (like the spouse or other legal entity name is listed), you can edit the name before saving to save the appropriate owner as the board member.

Be sure to select "Board" as the Board/Committee tab to give them full Board access on the portal.

For Board or Committee members who do not want their partner's registration to have the same Board level access, you can use the additional addresses to create a Board member record and then reassign the accounts as necessary.

1. Find the owners account info under homeowners, homeowners. Click on the addresses tab at the bottom.



2. Hit "New" and then select Board Member from the "Address Type" dropdown. Fill in the remaining information for the owner who is the acting board member and save. Do not select a billing type or check the mailing address box in this instance to avoid duplicate communications.
3. Be sure that this record is what's linked on the Board directory and in WebAxis. You can reassign the account in WebAxis to the Board Member record under Administration, Manage Homeowners.



Test User	TESTUSER123	TEST	123 Main St.	acaldon@barkanco.com	H: W: M:	View History
Jane Doe	test001	TEST	1 main st.	schauhan@barkanco.com	H: W: M:	View History
Brenda Stewart	TEST1234	TEST	1234 Test Street	bstewart@barkanco.com	H: W: M:	View History
Zuluaga Juan	TEST12345	TEST	12345 Test Street	jzuluaga@barkanco.com	H: W: M:	View History
Jane Doe	TEST456	TEST	28 Cape Codder Rd	schauhan@barkanco.com Board/Committee: Board	H: W: M:	View History

[Delete Registered User](#)
[Re-assign Account](#)
[Re-set Password](#)

- Highlight the board member account you created and select “re-assign account”. This allows the Board member and their partner to have separate access levels and accounts.

Re-Link Account

Filters

Name : [Search](#)
Account : [Search](#)

Address : [Search](#)
Unit : [Search](#)

Assoc Code	Assoc Name	Account	Homeowner	Status	Address (Type)
TEST	*Test Training Association	TESTUSER123	Test User	Owner	123 Main St. (Property Address)
TEST	*Test Training Association	TESTUSER123	Test User	Owner	123 Main St. (Board Member)

[Re-Assign Account](#)

Letter templates and owner correspondence: There are a number of templates available for use for all associations including the CINC intro notice that was sent out to all owners and the WebAxis log in Instructions.

- Go to tools, quick correspondence. Choose the owner, select the template you wish to use and change the status to “open”. Hit Post at the top of the page and the merged letter will go to your “queue” to be downloaded which you can share via PDF or print.



[Homeowners](#)
[Vendors](#)
[Banking](#)
[Accounting](#)
[CCR](#)
[Management](#)
[Reports](#)

Quick Correspondence

[Post](#)
[Refresh](#)
[Cancel](#)
[Dashboard](#)

*Test Training Association

Homeowner: James Smith
 Template: CINC Intro Notice
 Status: Open

Normal Times New Roma 3 (12pt) B I U S



You can also view, edit and add attachments to generated letters under the owner's account in the correspondence tab.

To make a new correspondence template, go to Tools, Correspondence Template, and hit new. You can add merge fields by inserting tags above the body of the letter.

Viewing Invoices and Payment Status in CINC: To view open or paid invoices by vendor, go to Vendors, Invoices, and put in your criteria. To view a copy of the invoice, click on the paperclip icon and download the attachment.

To check if a check has cleared, go to Banking, Bank Account Register, and check to see if the payment has been "Printed" or "Reconciled".

Printing Statements and Sending eStatements: Go to Homeowner, Print Statements.

[Homeowners](#)
[Vendors](#)
[Banking](#)
[Accounting](#)
[CCR](#)
[Management](#)
[Reports](#)

[Homeowners](#)
[Post Adjustments](#)
[Post Charges](#)
[Pending Payments](#)
[Unmatched Payments](#)
[Pending Closing Checks](#)
[Pending Scanned Checks](#)
[Batch Posting](#)
[Email eStatements](#)
[Email Correspondence](#)

[Transaction History](#)
[Payment Search](#)
[Resale](#)
[Generate Billing](#)
[Generate Coupons](#)
[Print Statements](#)

Excel Refresh Cancel Save

*Test Training Association

Contains Filter Search

Sections (All Sections)

Member Owner Mailing Address

Address	Acct# / Unit# / Lot#	Email	Status
1790 Sunhill Court	*TEST1790SHC//	Multiple Email Addresses	Owner



Select the date range you want to show on the statement, choose the statement type (Paper Statements to be printed or Send eStatements which will generate an email to the owner).

Choose which assessments you want to generate on the statement or select all. Billing formats refer to the owner's current billing type/preference. It is recommended that you select all four billing formats in order to generate a statement for all.

For Date: 02/01/2024 To: 02/03/2024

Statement Type: Send eStatements

Selected Homeowner Addresses without a valid email address will not generate an eStatement. They will appear on the Email eStatements screen as having an invalid or missing email.

Job Description:

Assessment Type: (All Assessments) SD Template: 1416 - BestBill Code:

Late Notice: (Select a Fee Notice Template) SD Template: 1416 -

Homeowner Criteria

Billing Formats: ☒ Statements ☒ eStatements ☒ Automatic ACH ☒ Coupons

Billing Status: ☒ Billable homeowners ☐ Non-billable homeowners

☐ New homeowners added between and

Choose Billable homeowners and enter any balance filters such as credit balances or owners with a \$0 balance. Hit the search icon in the Homeowners box to select the owners you want to generate statements for and then hit save in the homeowners menu box.

Balance Filters: Today's Balance At Least And/OR Less than or Equal To

Balance Older Than (Any) ☐ Include Posted Payments Only

Fee Type: (All Types)

☐ Include Credit Balance Homeowners

☐ Include Zero Balance Homeowners

Homeowner(s):

Due Date Information

Due Date:

Statement Messages

☐ Contact us

☐ Pay Online

☐ TEST

☐ test1

☐ test3

Homeowners Selection

Blocked Accounts Blocked Association Accounts

Section: (All Sections) Status: (All except Previous and Blocked)

	Account	Homeowner	Status	Address	Balance
☒	*TEST1100SFL	James Smith Mary Smith	Owner	1100 Sunny Field Lane # 114	\$100.00
☒	*TEST1250SFL	John Johnson	Owner	1250 Sunny Field Lane	\$500.00
☐	*TEST1180SRFC	Patricia Williams	Owner	1180 Sunrise Field Court # 116	\$500.00
☒	*TEST1195SRFC	Robert Brown Linda Brown	Owner	221 Beach Lane	\$350.00
☐	*TEST1400SHD	Michael Jones	Owner	1400 Sunhill Drive #	\$500.00

You can include messages on your statements as well such as additional bill to information, portal access reminders or thank you notes, etc.



Once all parameters have been entered, hit Print at the top of the page. If you have selected paper statements, they will go to your Recent Reports which you can download and print.

If you selected eStatements, go to Homeowners, Email eStatements. You can then view the statement before it goes out by selecting the “last viewed” date or “never” and it will be sent to your downloads to review. To send the email, check off the box to the left of the appropriate statements and hit email at the top. It will then be sent to the owner at the email address on file.

Work Orders:

- Enter, view and maintain work orders under Vendors, Work Orders.
- To automate notifications to owners when work order status is changed or when notes or updates are added, be sure to check off the “public” box and the “work order location” or “vendor” box before saving to send them a copy of the update.

Work Order Notes

Date	Public	Email	Note
07/01/2025	☒	☒ Work Location ☐ Vendor	Will review today. 18 / 7000

- If the note is internal only and you don’t want the owner/vendor to be notified, be sure to uncheck these boxes before saving.
- You can link work orders to a specific vendor in the “Work Assigned to” section. After typing in the vendor’s name, make sure you click the search icon to actively link the vendor to the work order.

Work Assigned To

Vendor	Phone	Address / ST Served
*Camden Light & Power Company CK NAME:*Camden Light & Power Company		7724 Main Street / GA
*Grassy Knoll, Inc.		555 Lemon Grass Drive / AL,FL,GA
*Polly's Pool Service		444 Elmwood Drive / GA
*Rufus Roofing		999 South Street / GA

- You can manually email the work order and any attachments or updates to the vendor or Maintenance personnel with the email button at the top of the work order.



Send Email

E-Mail

Cancel

From

Acaldon@barkanco.com x

To

cinc-sf@priyanet.com x

Q

CC

(separate with semicolon ';')

Q

BCC

(separate with semicolon ';')

Q

Subject

RE: Water Leak for testing (WO# 1)

Message

0 / 7000

Attachments	Date	Size
☒	Generate Work Order report and attach	

Be sure to check off “Generate Work Order and Attach” as well as any attachments listed at the bottom of the email box or the email will only include your message and the work order will be blank.

Reviewing budgets and CINC GL Accounts:

Go to Reports, Accounting Reports. Choose the Budget Summary report. Select the property and fiscal period and you can export the budget by PDF, Excel, or Word up at the top. It will go to your Recent Reports to the left to be downloaded.

etup

Help

Recent Updates

Homeowners

Vendors

Banking

Accounting

CCR

Management

Reports

Accounting Reports - Budget Summary Parameters

PDF

Excel

Word

Refresh

Cancel

Dashboard

Options

Association

*Test Training Association

Fiscal Year

2024

Include Zeros

☐

Attaching Documents to an Owner’s Account: Pull up the homeowner and choose the correspondence tab below. Choose “New” and enter the description of the document you want to attach.



[Homeowners](#) [Vendors](#) [Banking](#) [Accounting](#) [CCR](#) [Management](#) [Reports](#)

Correspondence Listing - Susan Anderson (Owner)

[+ New](#) [Delete](#) [Close](#) [Refresh](#) [Cancel](#)

Correspondence Type: (All Types)

For Dates: To:

View By: [Issues](#) [Notes](#)

Date	Status	Last Modified	Next Contact	Violation # / Descr / Type / Details
------	--------	---------------	--------------	--------------------------------------

No Correspondence Found!

[Addresses](#) [Correspondence](#) [Fees](#) [Information](#) [Transactions](#) [Resale](#) [W/O's](#) [Misc](#)

Choose a correspondence type, select the Open status, and a note type and hit save.

[Homeowners](#) [Vendors](#) [Banking](#) [Accounting](#) [CCR](#) [Management](#) [Reports](#)

Notes History - Susan Anderson (Owner)

[+ New](#) [Save](#) [Delete](#) [PDF](#) [Email](#) [Refresh](#) [Cancel](#)

[Help](#) [Dashboard](#)

Date	Next Contact	Entered By	Note Type
03/06/2024		Annie Caldon	Note - Private

Description: Settlement Statement Corr Type: System Note

Status: Open Attachments: (Select Attachment) [Manage](#) [View](#)

Note Date: 03/06/2024 Note Type: Note - Private

Next Contact:

Template: (Select a Template) [Go](#)

Once saved you can add an attachment by going to “Manage to the left” and choose the file to upload the document.

Correspondence Attachments - Susan Anderson (Owner)

[Save](#) [Delete](#) [Refresh](#) [Cancel](#)

Select an attachment [Choose Files](#) No file chosen

Uploaded	File Name
----------	-----------

There are currently no attachments uploaded.

Any questions or requests for custom content, reach out to support@barkanco.com.

CINC QRG 2025

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