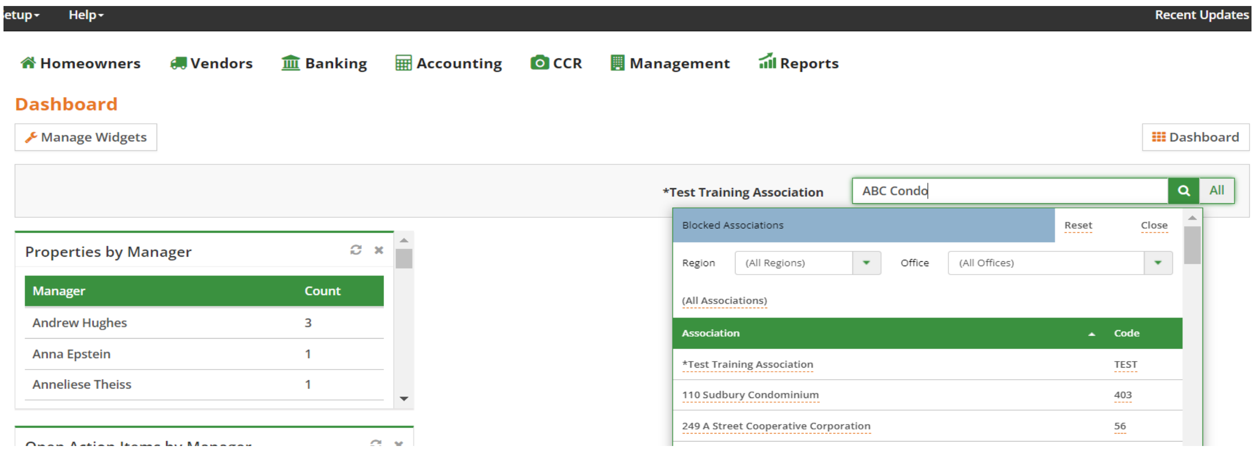
CINC Info Sheet:

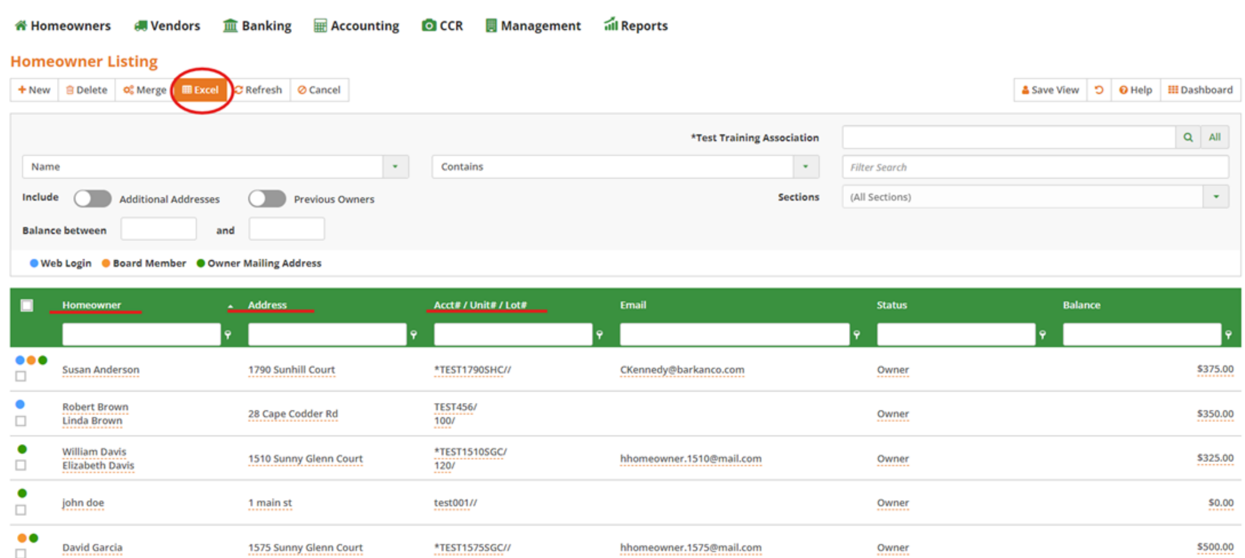
https://barkan.cincsys.com/

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.



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:



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.

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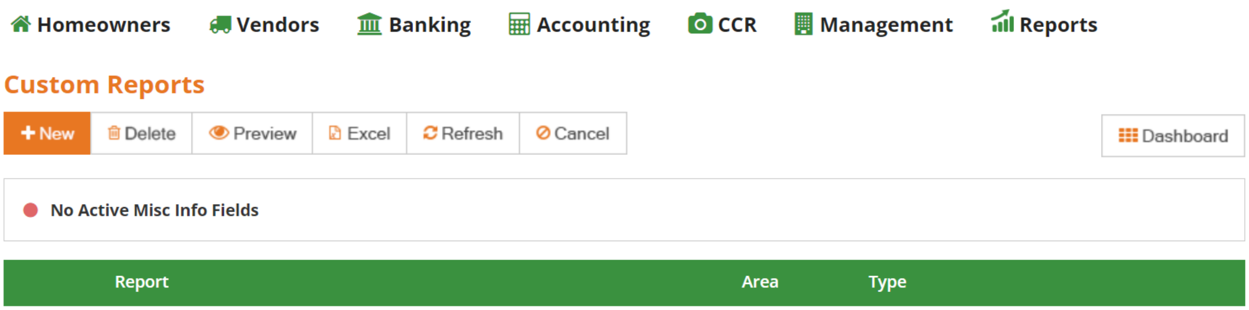
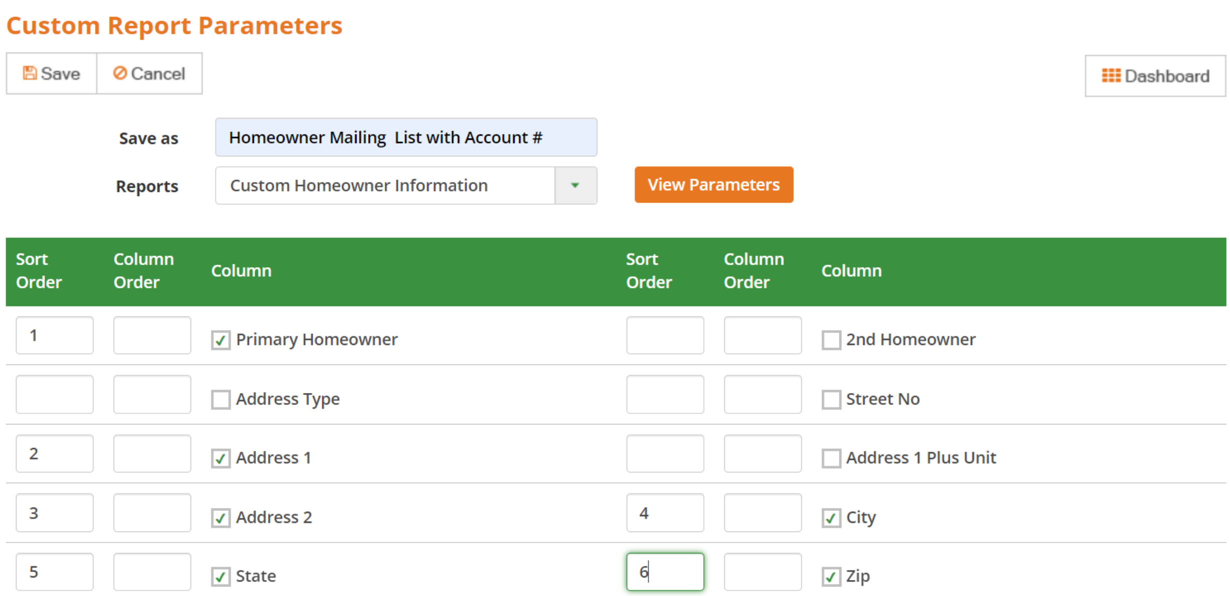
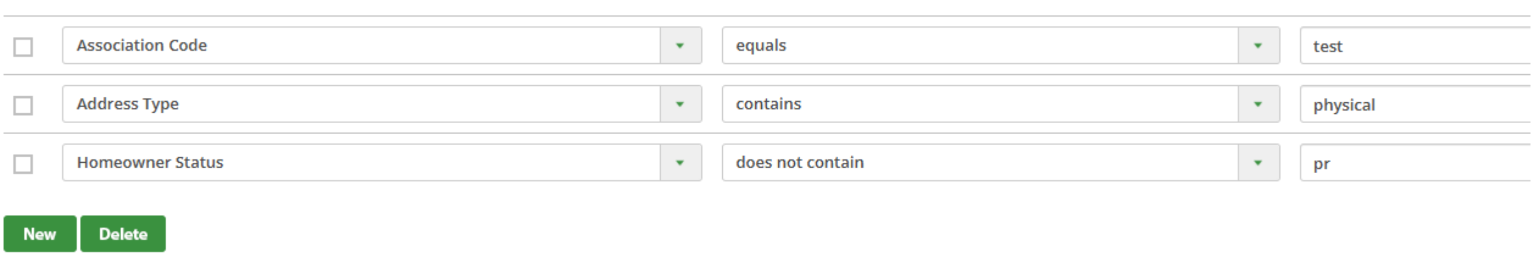
Create your own custom report under “Reports”, “Custom Reports”.



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.

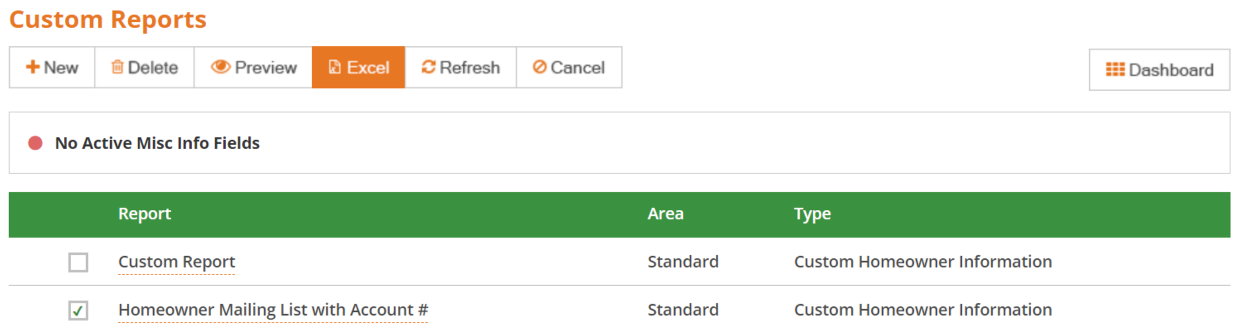


Add three additional parameters at the bottom by selecting “new”. Choose “Association Code”, “equals”, and then enter your property number (to run your report for a different property, just use the same report and enter another property number before exporting it).



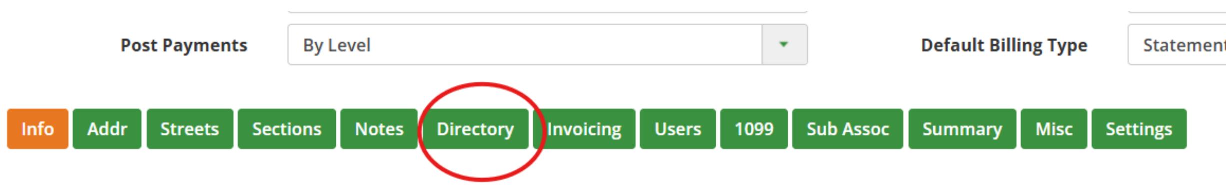
Hit save at the top and return to the bottom to enter another “new” parameter.

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.

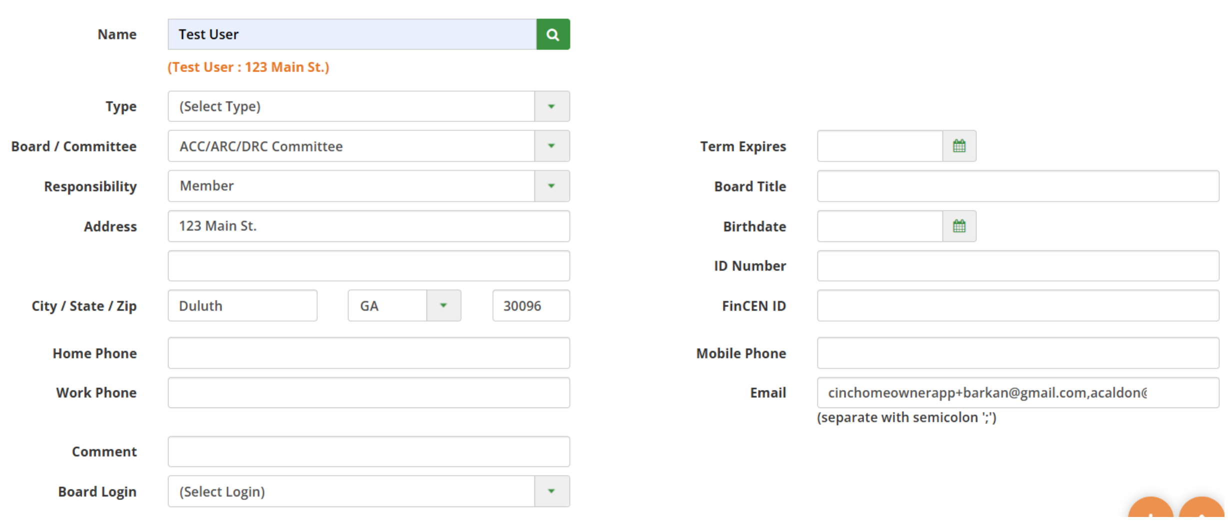


Select your report and either preview or export the report to Excel. It will then be downloaded to your browser for use.

<u>Updating Board and Committee Members:</u> 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.



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.



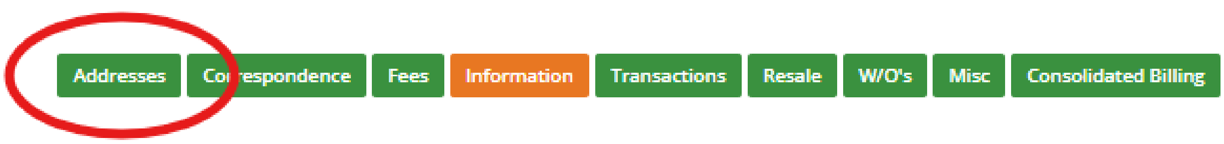
Once you type in the Board member's name or unit address, be sure to **click the search button** to link the Board member to the unit/account number so that their access in WebAxis will be updated. It will show the unit address in **orange** under the name if you've successfully linked it.

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.

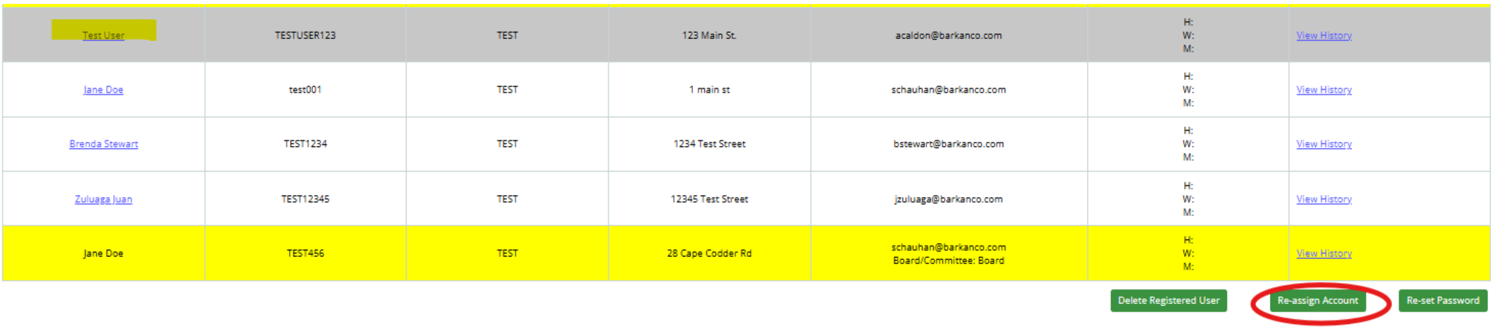
Be sure to select "Board" as the Board/Committee tab to give them full Board access on the portal.

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.

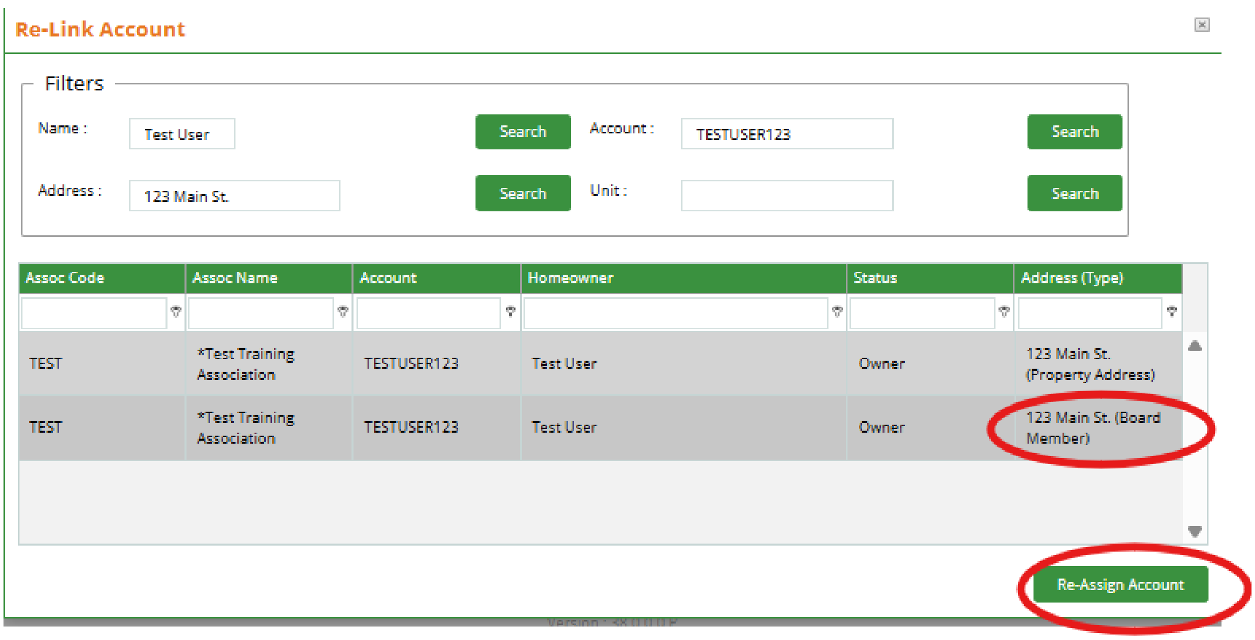


2. Hit "New" and then select Board Member from the "Address Type" dropdown. Fill in the remaining information for the owner who is the acting board member and save. Do not select a billing type or check the mailing address box in this instance to avoid duplicate communications.
3. Be sure that this record 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.



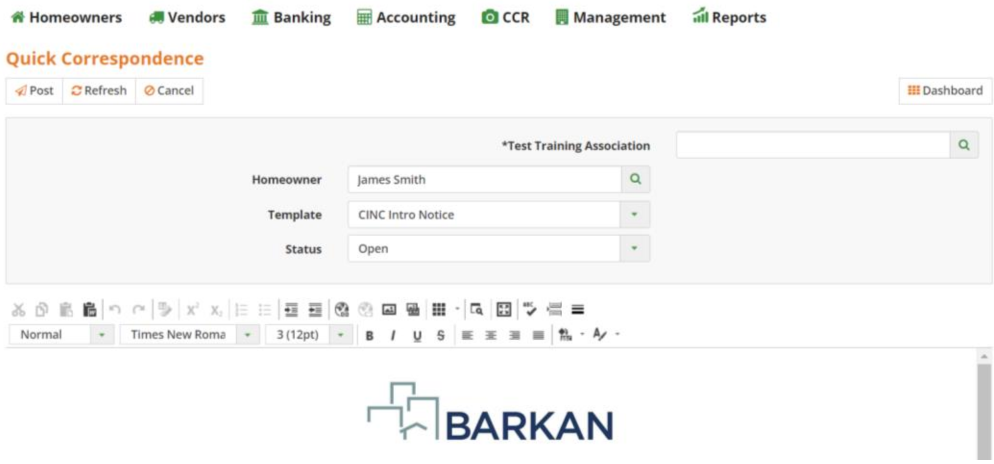
Test User	TESTUSER123	TEST	123 Main St.	acaldon@barkanco.com	H: W: M:	View History
Jane Doe	test001	TEST	1 main st	schauhan@barkanco.com	H: W: M:	View History
Brenda Stewart	TEST1234	TEST	1234 Test Street	bstewart@barkanco.com	H: W: M:	View History
Zuluaga Juan	TEST12345	TEST	12345 Test Street	jzuluaga@barkanco.com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

4. 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.



<u>Letter templates and owner correspondence:</u> There are a numer of templates availble 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.



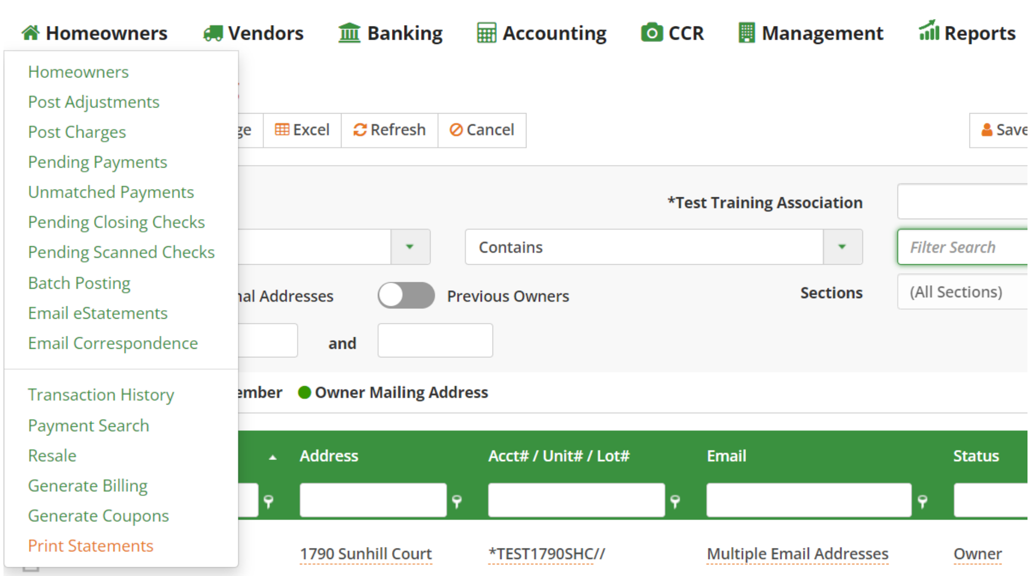
You can also view, edit and add attachments to generated letters under the owner's account in the correspondence tab.

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.

<u>Viewing Invoices and Payment Status in CINC:</u> 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.

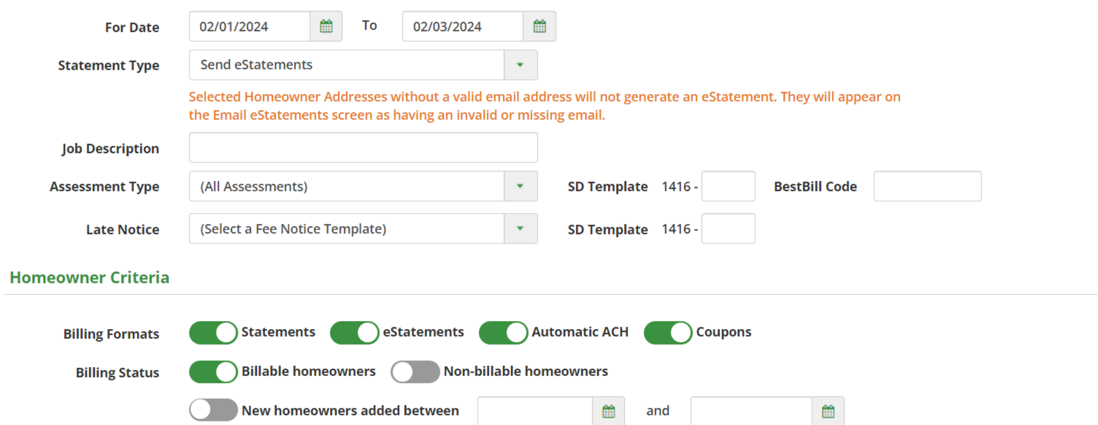
To check if a check has cleared, go to Banking, Bank Account Register, and check to see if the payment has been "Printed" or "Reconciled".

<u>Printing Statements and Sending eStatements:</u> Go to Homeowner, Print Statements.

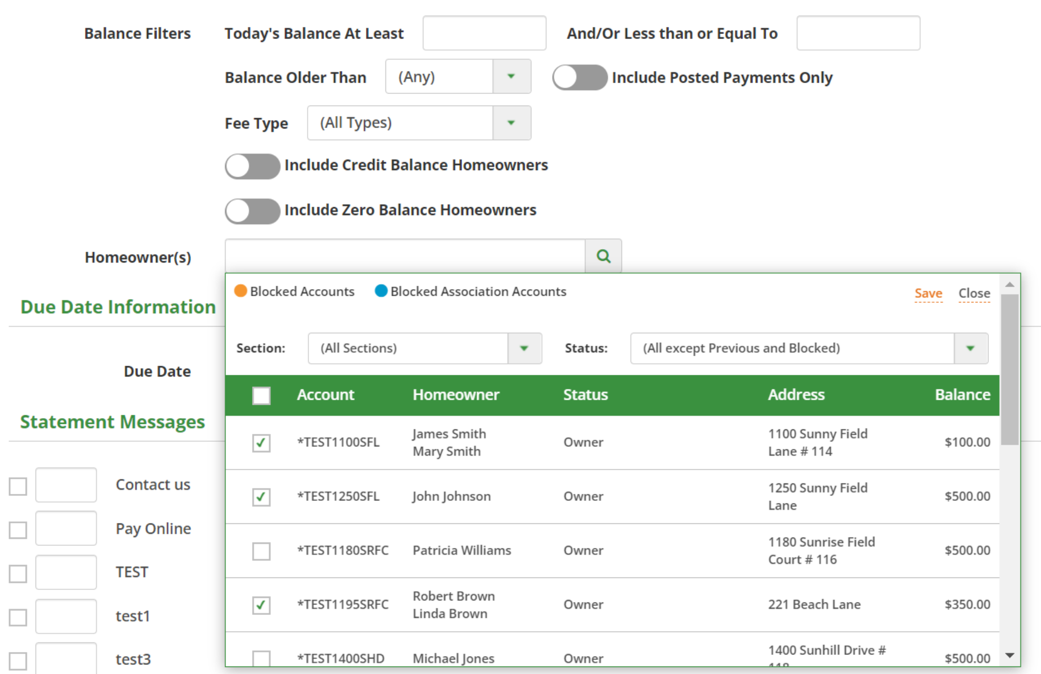


Select the date range you want to show on the statement, choose the statement type (Paper Statements to be printed or Send eStatements which will generate an email to the owner).

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.



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.



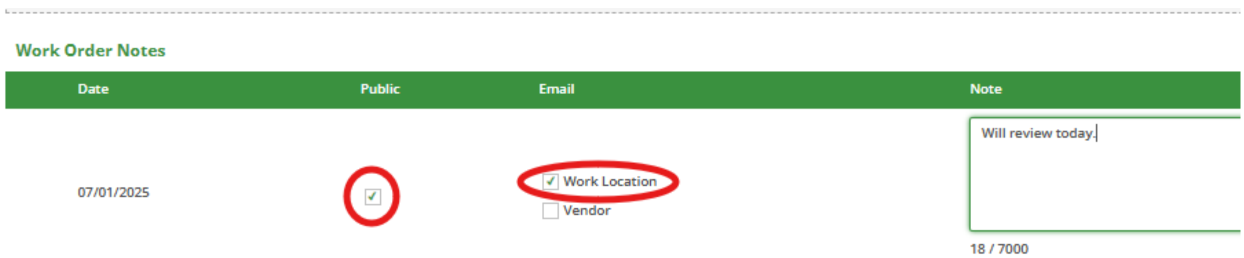
You can include messages on your statements as well such as additional bill to information, portal access reminders or thank you notes, etc.

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.

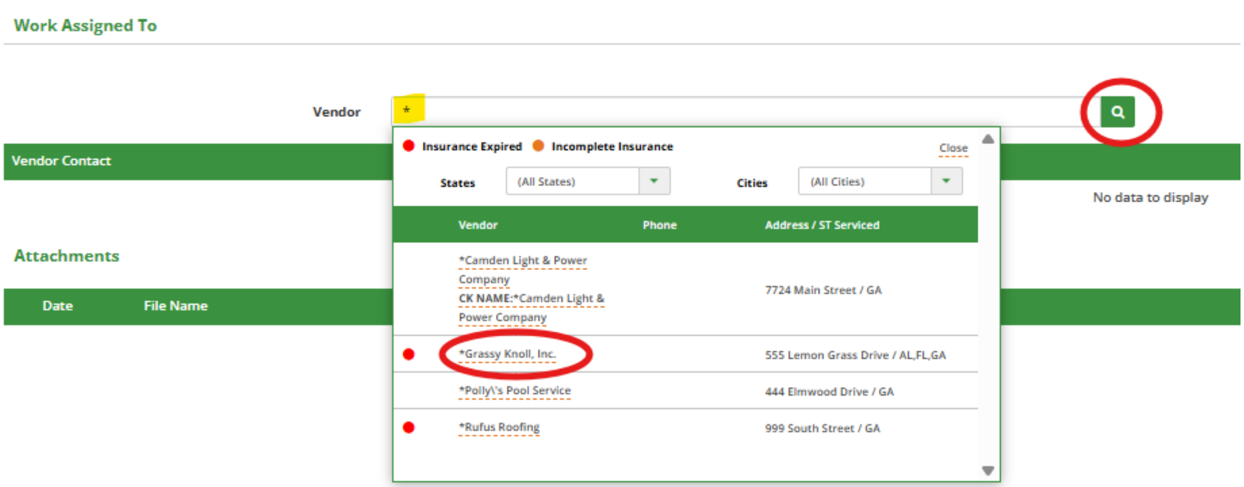
If you selected eStatements, go to Homeowners, Email eStatements. You can then view the statement before it goes out by selectng the "last viewed" date or "never" and it will be sent to your downloads to review. To send the email, check off the box to the left of the appropriate statements and hit email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

<u>Work Orders:</u>

- 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.



- 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.



- 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.

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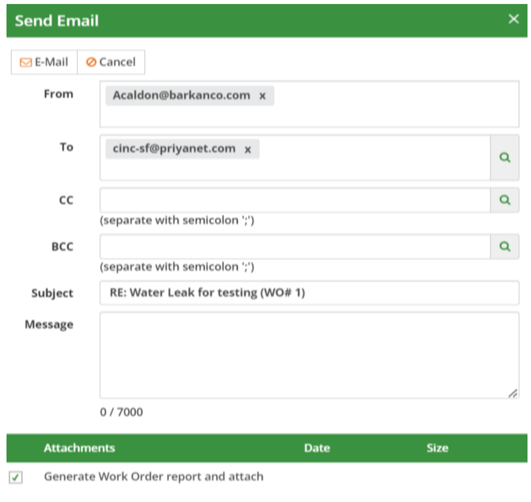
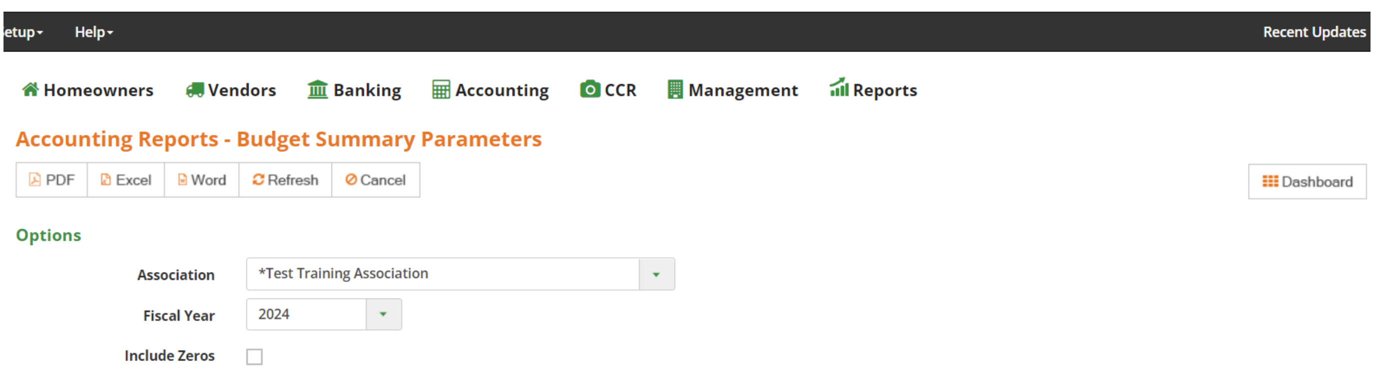


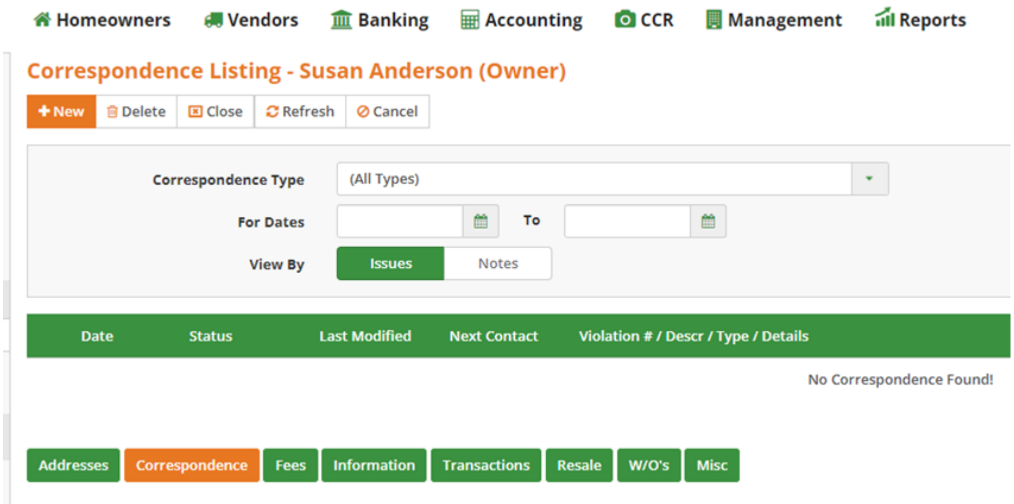
Be sure to check off “Generate Work Order and Attach” as well as any attachments listed at the bottom of the email box or the email will only include your message and the work order will be blank.

<u>Reviewing budgets and CINC GL Accounts:</u>

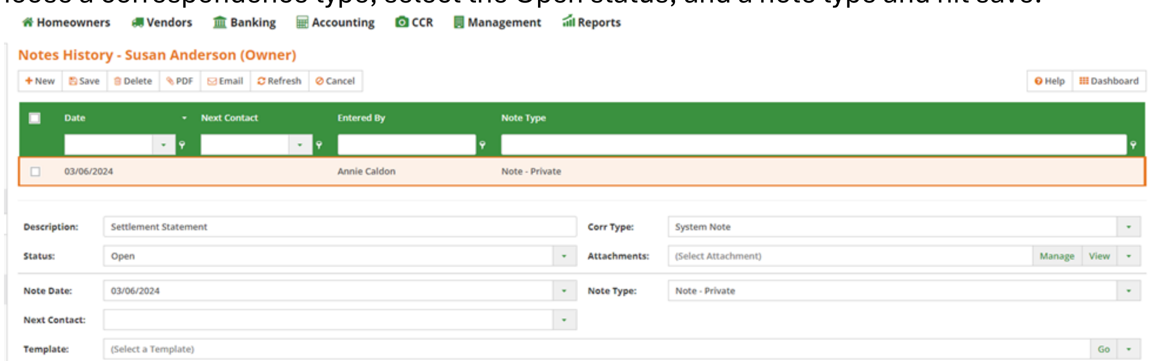
Go to Reports, Accounting Reports. Choose the Budget Summary report. Select the property and fiscal period and you can export the budget by PDF, Excel, or Word up at the top. It will go to your Recent Reports to the left to be downloaded.



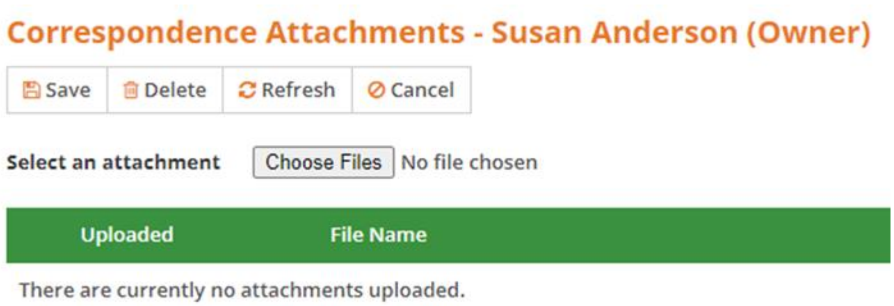
<u>Attaching Documents to an Owner’s Account:</u> Pull up the homeowner and choose the correspondence tab below. Choose “New” and enter the description of the document you want to attach.



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



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



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