



## Association Manager Training

Date: 7/19/2021

## Table of Contents

|                                           |    |
|-------------------------------------------|----|
| Getting Started.....                      | 4  |
| Logging In.....                           | 4  |
| Homeowner Information.....                | 6  |
| Homeowner Search.....                     | 6  |
| Primary Homeowner Information Screen..... | 7  |
| Additional Homeowner Tabs .....           | 13 |
| Work Orders.....                          | 14 |
| Submit Work Order .....                   | 14 |
| Email Work Order .....                    | 17 |
| Payment Search .....                      | 19 |
| Vendor Information.....                   | 20 |
| Vendor Search.....                        | 20 |
| Vendor Review .....                       | 20 |
| Adding Vendor Notes.....                  | 25 |
| Editing Vendor Notes.....                 | 26 |
| Preferred Vendor Setup .....              | 26 |
| Excel List of Vendors.....                | 27 |
| Vendor Invoices.....                      | 27 |
| Vendor Invoices Overview .....            | 29 |
| Association Directory.....                | 32 |
| Set up Board Members.....                 | 32 |
| Directory Tab.....                        | 32 |
| Addr Tab.....                             | 35 |
| Set Up Common Areas.....                  | 35 |
| Violation Correspondence Options .....    | 36 |
| Manage Email Template .....               | 36 |
| Set Email Security Permission .....       | 38 |
| Select Paper Source .....                 | 38 |
| Email Violation Letters.....              | 39 |

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Table of Exhibits

|                                                             |    |
|-------------------------------------------------------------|----|
| Exhibit 1: Black Box Menu.....                              | 4  |
| Exhibit 2: Top Menu Bar .....                               | 4  |
| Exhibit 3: CINC Login Screen .....                          | 4  |
| Exhibit 4: Manage Widgets Button.....                       | 5  |
| Exhibit 5: List of Available Widgets .....                  | 5  |
| Exhibit 6: Task List .....                                  | 5  |
| Exhibit 7: Home Screen/Dashboard Widgets.....               | 6  |
| Exhibit 8: Homeowner Listing Screen.....                    | 6  |
| Exhibit 9: Submenu.....                                     | 7  |
| Exhibit 10: Homeowner Information.....                      | 7  |
| Exhibit 11: Primary Homeowner Information Screen .....      | 10 |
| Exhibit 12: Future Transactions Screen .....                | 11 |
| Exhibit 13: Activity Log.....                               | 11 |
| Exhibit 14: Transaction Description.....                    | 11 |
| Exhibit 15: Batch Details .....                             | 12 |
| Exhibit 16: Transaction History Screen.....                 | 12 |
| Exhibit 17: Tabs on Homeowner Screen.....                   | 13 |
| Exhibit 18: Work Order Tab .....                            | 14 |
| Exhibit 19: Work Order List Screen .....                    | 14 |
| Exhibit 20: New Work Order Screen.....                      | 14 |
| Exhibit 21: Completed Work Order .....                      | 16 |
| Exhibit 22: New Work Order in List .....                    | 16 |
| Exhibit 23: Work Order Email Button .....                   | 17 |
| Exhibit 24: Send Email Screen .....                         | 17 |
| Exhibit 25: Work Order Report .....                         | 18 |
| Exhibit 26: Payment Search Screen.....                      | 19 |
| Exhibit 27: Transaction History Screen.....                 | 19 |
| Exhibit 28: Vendor List Screen .....                        | 20 |
| Exhibit 29: Create New Vendor.....                          | 20 |
| Exhibit 30: Vendor Information—Top Section.....             | 21 |
| Exhibit 31: Vendor Information—Areas Services Section.....  | 22 |
| Exhibit 32: Vendor Information—ACH Section .....            | 22 |
| Exhibit 33: Vendor Information—Primary Contact Section..... | 23 |
| Exhibit 34: Insurance Info Tab Screen .....                 | 23 |
| Exhibit 35: License Info Screen.....                        | 24 |
| Exhibit 36: Vendor Screen Tabs.....                         | 24 |
| Exhibit 37: Vendor Notes History Screen.....                | 25 |
| Exhibit 38: Notes History Screen.....                       | 26 |
| Exhibit 39: Directory Tab .....                             | 27 |
| Exhibit 40: Create New Service Provider .....               | 27 |

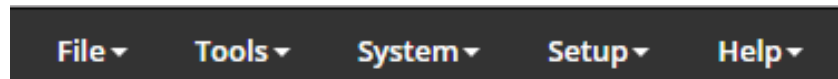
|                                                           |    |
|-----------------------------------------------------------|----|
| Exhibit 41: Vendor List Screen .....                      | 27 |
| Exhibit 42: Invoice Options Section .....                 | 28 |
| Exhibit 43: Invoicing Privileges Screen.....              | 28 |
| Exhibit 44: Board Approvals Required.....                 | 29 |
| Exhibit 45: Initial Invoice Approval Order .....          | 29 |
| Exhibit 46: Invoice List Screen.....                      | 30 |
| Exhibit 47: Invoice Flags.....                            | 30 |
| Exhibit 48: Posting Issue Popup .....                     | 31 |
| Exhibit 49: Select Association .....                      | 32 |
| Exhibit 50: Go to Directory Screen .....                  | 32 |
| Exhibit 51: Board Members Screen.....                     | 33 |
| Exhibit 52: Specific Board Member Info .....              | 33 |
| Exhibit 53: Name Search.....                              | 34 |
| Exhibit 54: Applicable Fields .....                       | 34 |
| Exhibit 55: Additional Addresses Screen .....             | 35 |
| Exhibit 56: Create New Assoc. Address Type.....           | 36 |
| Exhibit 57: Edit Email Template Screen .....              | 36 |
| Exhibit 58: Edit Email Template Screen—HTML Section ..... | 37 |
| Exhibit 59: Email Template .....                          | 37 |
| Exhibit 60: Security Permissions Screen .....             | 38 |
| Exhibit 61: Paper Source Dropdown Options .....           | 38 |
| Exhibit 62: Edit Correspondence Template Screen .....     | 39 |
| Exhibit 63: Email Correspondence Screen .....             | 39 |



For the sake of brevity in this manual, references to the menus and submenus in the tool bars will be in this form: Select [**Menu item**]/[*Submenu item*]. For example:

- Select **Tools**/*Data Import*
- Select **Reports**/*Homeowner Reports*

*Exhibit 1: Black Box Menu*



*Exhibit 2: Top Menu Bar*



## Getting Started

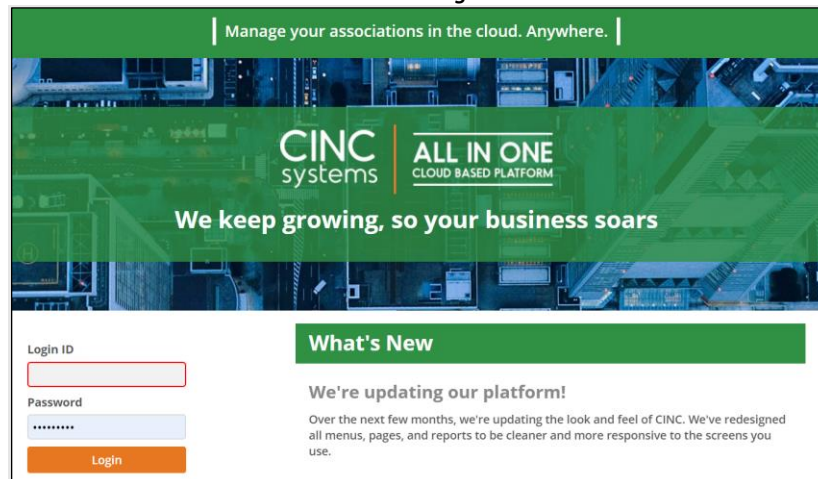
### Logging In

To log in to the appropriate database, go to <https://xxx.cincsys.com> (Enter correct company code to replace the xxx). A login screen will appear. Enter Login ID and Password as provided by the System Administrator.



*The “What’s New” section on the login screen will provide upcoming webinar and holiday information, as well as notifications of system modifications.*

*Exhibit 3: CINC Login Screen*



Once logged in, the CINC home screen will have several menu selections as described below. **\*NOTE:** Use the Manage Widgets button to select and save a dashboard view that is unique to the specific Association Manager.

Exhibit 4: Manage Widgets Button

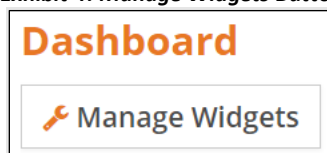
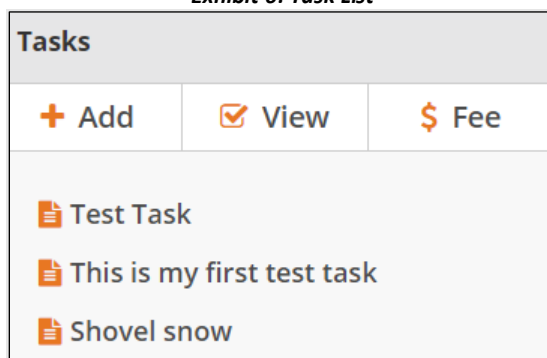


Exhibit 5: List of Available Widgets



- **Top Black Menu Bar**—Assists in the setup and management of the system
- **Tasks**—List of pending tasks

Exhibit 6: Task List



- **Recent Reports**—List of reports that have been run recently
- **Quick Links**—Provides quick access to recently viewed associations and homeowners

Exhibit 7: Home Screen/Dashboard Widgets

The screenshot displays the CINC systems Home Screen/Dashboard. The interface includes a top navigation bar with menus for File, Tools, System, Setup, and Help. A sidebar on the left provides quick access to various modules: Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, and Reports. The main dashboard area features several widgets: 'Open Action Items' with a table of action items, 'Properties by Manager' showing a table of managers and their counts, 'Alternate Addresses By Type' with a pie chart, and 'Invoices By Status' with a pie chart. The bottom of the dashboard shows a list of recent properties and a 'Quick Links' section.

## Homeowner Information

### Homeowner Search

To search for homeowner information, complete the following steps:

1. Search for and select the desired association
2. Select **Homeowners/Homeowners**, and search for the homeowner using any of the following criteria:
  - Name
  - Address
  - Account Number
  - Billing Type
  - Additional Address
  - Previous Owner
  - Balance Between...

Exhibit 8: Homeowner Listing Screen

The screenshot displays the CINC systems Homeowner Listing Screen. The interface includes a top navigation bar with menus for File, Tools, System, Setup, and Help. A sidebar on the left provides quick access to various modules: Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, and Reports. The main listing area features a search bar with filters for Name, Address, and Balance. Below the search bar is a table of homeowners with columns for Homeowner, Address, Acct# / Unit# / Lot#, Email, Status, and Balance. The table lists two homeowners: Jason Stevenson and Joan Worthington. The 'Save View' button is highlighted with a red box.

| Homeowner        | Address          | Acct# / Unit# / Lot# | Email | Status                | Balance  |
|------------------|------------------|----------------------|-------|-----------------------|----------|
| Jason Stevenson  | 6566 Purple Lane | PA025687//           |       | Active Implementation | \$930.00 |
| Joan Worthington | 8254 Purple Lane | PA033567//           |       | Active Implementation | \$25.00  |



To search by the same criteria each time on the Homeowner Listing screen, select the desired search criteria and click **Save View**. This will default the screen to that view.



Hover over the checkbox to the left of the homeowner to view a submenu from which to select Addresses, Correspondence, Fees, Resale, W/O's, or Misc.



The color-coded legend indicates if homeowner has a WebAxis login, is a board member, and/or if the address shown is the owner's mailing address

**Exhibit 9: Submenu**

| Homeowner                | Address         | Acct# / Unit# / Lot#     | Email   | Status | Balance  |
|--------------------------|-----------------|--------------------------|---------|--------|----------|
| <input type="checkbox"/> | 189-11 117, INC | 3431 SABLE CHASE<br>LANE | 16263// | Owner  | \$925.00 |
| <input type="checkbox"/> | ROAD            |                          |         | Owner  | \$900.00 |

Addresses   Correspondence   Fees   Resale   W/O's   Misc

### Primary Homeowner Information Screen

Once the homeowner search is complete, a list of results will appear. If a link is clicked under any of the following columns, the system will navigate directly to the *Primary Homeowner Information* screen:

- Homeowner
- Address
- Acct. #/Unit #/Lot #
- Email
- Status

The following data can be found on the *Primary Homeowner Information* screen:

**Exhibit 10: Homeowner Information**

| Field Name     | Type           | Field Description (Blue fields are required)                                                                                                                                                                                                                                                                                                                                 |
|----------------|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Association    | Fillable field | Name of association. This is hard coded once a homeowner is selected                                                                                                                                                                                                                                                                                                         |
| Settled        | Date           | The date the homeowner took ownership of the property (displays when a resale/ownership transfer has been processed). Enter a date here and save it or enter it on the resale screen                                                                                                                                                                                         |
| Drive Order    | Fillable field | The order of this home in the community when entering the community and driving through it (1, 2, 245, etc.)                                                                                                                                                                                                                                                                 |
| Status         | Dropdown       | Property or homeowner status. Defaults to first entry in list. Homeowner Status controls many functions, e.g. deciding if the homeowner should have late fees applied or if their account is evaluated by the Collection process. For full details of all system functions that are controlled by the Homeowner Status, see <b>System/Dropdown Options: Homeowner Status</b> |
| Block Payments | Checkbox       | Check if a homeowner is blocked from making payments (All customers only)                                                                                                                                                                                                                                                                                                    |



| Field Name            | Type           | Field Description (Blue fields are required)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Mgt Rental Ratio      | Fillable field | Percentage. If the property is rented, a percentage of the payment goes to the management company, in which case an invoice payable to the management company is created                                                                                                                                                                                                                                                                                                                                                      |
| Fee Percentages       | Search button  | Pertains to billing for homeowners, if billed by a % of budgeted amount. This should be changed only if the association uses percentage/ratio billing                                                                                                                                                                                                                                                                                                                                                                         |
| Collection Status     | Dropdown       | 15-, 30-, 60-day notice; Attorney, Board Approval, Intent to Lien. The status will be automatically set when the Collection module is in use from <b>Setup/Collections Setup: New</b>                                                                                                                                                                                                                                                                                                                                         |
| Activity Log          | Hyperlink      | Displays homeowner collections activities chronologically                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Attorney              | Dropdown       | Set up in <b>Vendors/Vendor Information</b> . Assignment of an attorney is automatic through the Collections module, but one may be manually selected and saved from this dropdown                                                                                                                                                                                                                                                                                                                                            |
| Hold Collections      | Dropdown       | Specify reasons for placing collections on hold. If a <b>Resume Collections</b> date is set, the system removes the hold and reevaluates account. Can override from here. Set up under <b>System/Dropdown Options: Collection Hold Reason</b>                                                                                                                                                                                                                                                                                 |
| Resume Collections    | Date           | Date to resume collections that have been on hold                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Payment Plan          | Dropdown       | <i>None, Active or in Default of payment plan</i> . Affects the order in which payments are applied. Set up under <b>System/Assessments</b> . This does not set up a payment plan                                                                                                                                                                                                                                                                                                                                             |
| Account No.           | Fillable field | Follows property, not homeowner. Account numbers in CINC can be alpha or numeric or a combination. The max length for an account number is 16 digits. The number should not contain special characters or spaces (no dashes). CINC does not recommend zero padding the numbers to make them a consistent length but rather a number that begins with the association code and contains a representation of the address or unit. If left blank the system will assign an account number. However, CINC does not recommend this |
| Owner #               | Fillable field | Previous/current owner is #1, new owner #2, etc.                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Sections              | Search button  | Provides ability to bill by property type, e.g. homes, condos, and townhomes in same community. Examples: <i>Single family, townhome, condo, 1 BR, 2 BR, homes with boat slips</i> , etc. Can also be used for dividing a large community for the purpose of violation inspections or broadcast communications through WebAxis                                                                                                                                                                                                |
| Name                  | Fillable field | Owner First and Last Name (See <a href="#">Data Standards</a> for Name /Address /Phone/Email fields)                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Second Name           | Fillable field | Secondary owner first and last name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Address               | Fillable field | Street Number and Street Name are separate fields. Should not include Unit #s. Use the Unit # field instead to ensure that all correspondence and any export files to coupon vendors include the Unit # in the appropriate field                                                                                                                                                                                                                                                                                              |
| Owner Mailing Address | Checkbox       | If checked, owners live at property. If not checked, owners will also have an offsite address in the system, which is accessed by clicking <b>Addresses</b> at the bottom of the screen                                                                                                                                                                                                                                                                                                                                       |
| City                  | Fillable field |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

| Field Name              | Type           | Field Description (Blue fields are required)                                                                                                                                                                                                            |
|-------------------------|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| State                   | Dropdown       | Set up under <b>System/Dropdown Options: Address States</b>                                                                                                                                                                                             |
| Zip                     | Fillable field |                                                                                                                                                                                                                                                         |
| Counties                | Search button  | Dropdown; Set up under <b>System/Dropdown Options: County</b>                                                                                                                                                                                           |
| Country                 | Fillable field |                                                                                                                                                                                                                                                         |
| Unit #                  | Fillable field | This field should be used for communities that assign a unit # as a part of the primary address                                                                                                                                                         |
| Lot #                   | Fillable field |                                                                                                                                                                                                                                                         |
| Phase #                 | Fillable field |                                                                                                                                                                                                                                                         |
| Village #               | Fillable field |                                                                                                                                                                                                                                                         |
| Block #                 | Fillable field |                                                                                                                                                                                                                                                         |
| Home Phone              | Fillable field |                                                                                                                                                                                                                                                         |
| Work Phone              | Fillable field |                                                                                                                                                                                                                                                         |
| Mobile Phone            | Fillable field |                                                                                                                                                                                                                                                         |
| Email                   | Fillable field | Can enter more than one address, separated by semicolons                                                                                                                                                                                                |
| Billing Type            | Dropdown       | <i>Automatic ACH; Coupons; eStatements; Statements</i> . Must always be set on the same screen where <i>Owner Mailing Address</i> is defined                                                                                                            |
| ACH Start Date          | Date           | Date to start debiting the homeowner's account. An ACH batch is generated seven days earlier. Should be used only to delay the start of drafting the owners account                                                                                     |
| Account Type            | Dropdown       | <i>Checking or Savings</i>                                                                                                                                                                                                                              |
| Generate Prenote        |                | Check this to generate a \$0 charge using routing and account information to verify that the information is accurate. This puts a seven-day hold on the homeowner's account. No other debit can be charged to the account until the prenote is approved |
| Routing No.             | Fillable field | Bank account routing number                                                                                                                                                                                                                             |
| Account No.             | Fillable field | Bank account number                                                                                                                                                                                                                                     |
| User Defined Fields (4) | Fillable field | Pertain to ACH payments, routing and account numbers, etc.                                                                                                                                                                                              |
| CINC Manager Comment    | Fillable field | The data entered in this field will appear in the CINC Manager app and allows for two-way updating of this data for the app and this site                                                                                                               |

Exhibit 11: Primary Homeowner Information Screen

**Primary Homeowner Information**

Save Save & New Cancel Quick Message Dashboard

Association ABC Condo association

Settled

Status Active Implementation

Mgmt Rental Ratio 0 %

Collection Status (No Status)

Attorney (None)

Hold Collections (None)

Payment Plan (None)

Account No PA033567 Owner # 1 Sections

Name Joan

Second Name

Address 8254

City, State Zip Atlanta GA 32351 Counties

Country

Unit #

Phase #

Block #

Home Phone

Mobile Phone

Billing Type (None)

Gate Code

User Defined 2

User Defined 3

User Defined 4

CINC Manager Comment

0 / 4000

Drive Order 0

Block Payments ☐

Fee Percentages

Activity Log

Resume Collections

Worthington

Purple Lane

Owner Mailing Address? ☒

Lot #

Village #

Work Phone

Email

Activity Log

Addresses Correspondence Fees **Information** Transactions Resale W/O's Misc

Clicking an underlined **Balance** on the *Homeowner Listing* screen displays the *Homeowner Transaction History* screen. The following information will display:

- **Property Status**—Displays the status of the property as selected on the *Homeowner Information* screen
- **Collection Status (if applicable)**—Will display next to the homeowner's name in red
- **Account Number**—Click the link to toggle between current and previous homeowner accounts
- Transactions
- **Activity Dates**—Defaults as first day of the year, to today's date
- **Future Charges**—To view, click on the *Charge Grouping* view screen

**Exhibit 12: Future Transactions Screen**

| Date                                         | Description            | Batch | Amount | Paid |
|----------------------------------------------|------------------------|-------|--------|------|
| Assessment - Homeowner (Delinquent Fee) 2016 |                        |       |        |      |
| 6/30/2016                                    | Balance Forward        |       |        |      |
| 7/16/2016                                    | Assessment - Homeowner |       |        |      |
| 8/16/2016                                    | Assessment - Homeowner |       |        |      |
| 9/16/2016                                    | Assessment - Homeowner |       |        |      |
| Assessment - Homeowner 2016                  |                        |       |        |      |
| 6/30/2016                                    | Balance Forward        |       |        |      |
| 7/1/2016                                     | Assessment             |       |        |      |
| 7/20/2016                                    | Cash                   |       |        |      |
| 8/1/2016                                     | Assessment             |       |        |      |
| 9/1/2016                                     | Assessment             |       |        |      |

**Future Transactions**  

Save Merge Delete Cancel

Assessment - Homeowner (Delinquent Fee) 2016

For Acct: 2110309 -

| Date                         | Amount |
|------------------------------|--------|
| There are no future charges. |        |

- **Activity Log**—Displays a list of account activities and users responsible for the actions

**Exhibit 13: Activity Log**

Acct: 2110309 Addr: 211 E Ohio St # 0309

Show All Transacti View Charge Grou

Activity Log

Activity From 1/1/2013

| Date      | Description     |
|-----------|-----------------|
| 6/30/2016 | Balance Forward |

**Activity Log**  
Cancel  

| Date      | User         | Action | Details                                                |
|-----------|--------------|--------|--------------------------------------------------------|
| 7/20/2016 | TBG - Alicia | Move   | Assessment - Homeowner 2016 Cash \$172.00 From:2110303 |

- **Today's Balance**
- **Charge Notes**—Click on the green or red square to read or edit the Transaction Notes
- **Transaction Date**—Click the **Date** to review and edit the *Transaction Description*

**Exhibit 14: Transaction Description**

**Transaction Note**  
Save Cancel

|             |                        |            |        |
|-------------|------------------------|------------|--------|
| Assessment  | Assessment - Homeowner | Type       | Charge |
| Description | Assessment - Homeowner | (optional) |        |
| Date        | 8/16/2016              | Batch      | 2592   |
| Amount      | \$20.00                | Ref No     |        |

- **Batch Number/Link**—Click on the link to generate a *Batch Audit Report*. Hover over the number to see a pop up with the batch details (*Charge Grouping View*)

Exhibit 15: Batch Details

|           |            |                                                                                                                                                                                                                   |          |
|-----------|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| 7/1/2016  | Assessment | 2535                                                                                                                                                                                                              | \$125.00 |
| 7/20/2016 | Cash       | <b>Batch Type:</b> Statement<br><b>Opened:</b> 7/11/2016 2:06:03 PM by Administrator<br><b>Posted:</b> 7/1/2016 by Administrator<br><b>Actual Posted:</b> 7/11/2016 2:15:43 PM<br><b>Batch Total:</b> \$33,000.00 |          |
| 8/1/2016  | Assessment |                                                                                                                                                                                                                   |          |
| 9/1/2016  | Assessment |                                                                                                                                                                                                                   |          |
| 10/1/2016 | Assessment |                                                                                                                                                                                                                   |          |

Exhibit 16: Transaction History Screen

**Transaction History - [Redacted] (Owner)**

+ New   Writeoff   PDF   Refresh   Cancel   ? Help   Dashboard

Atlanta Executive Property Mgmt Training

Homeowner [Redacted]

Show All Transacti View Charge Gro

Activity From 1/1/2013 Thru 4/29/2020 Today's Balance \$900.00

| Date                        | Description | Batch | Amount   | Paid | Balance |
|-----------------------------|-------------|-------|----------|------|---------|
| Assessment - Homeowner 2016 |             |       |          |      |         |
| 4/1/2016                    | Monthly     | 2523  | \$100.00 |      |         |
| 5/1/2016                    | Monthly     | 2523  | \$100.00 |      |         |

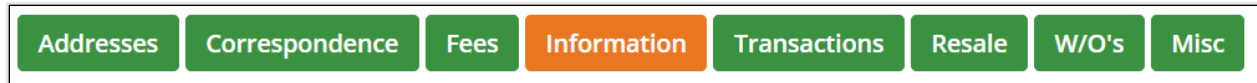


Additional search criteria are available on this screen using the **Association, Homeowner, Show, View, and Date** fields.

**\*NOTE:** When searching by View, the Charge Grouping option will display the results as groupings by Assessment Type. The Transactions by Date view will display the results in date order. Preferred views may be set under **System**/User Preferences.

## Additional Homeowner Tabs

Exhibit 17: Tabs on Homeowner Screen



The *Primary Homeowner Information* screen includes tabs that contain the following additional information:

- **Addresses**—Additional addresses can be added for mailing purposes, and to store additional owner information such as tenants, management company addresses, etc.
- **Correspondence**—Communications to homeowners (notes, letters, etc.) are saved here for review. An alert for a *Next Contact Reminder* may be set under **File/Alerts/Reminders**. Any collection or violation letters issued through the system will be stored under Homeowner Correspondence
- **Fees**—Fees/assessments related to the homeowner as defined in the association fee setup. This tab may be used to generate billing for an individual homeowner
- **Information**—Main homeowner information screen as displayed from the initial search results. This is where the property address and owner information are saved
- **Transactions**—*Transaction History* screen (aka the Homeowner Ledger). Can view or sort in multiple ways depending on the need: assessment grouping, date order, payments-only (to find missing payment). For detailed instructions, link to transaction history details
- **Resale**—Completed to separate pre- and post-bankruptcy accounts and to change ownership
- **WOs**—Work orders can be submitted for the homeowner from this tab. It is assumed that work location will be at homeowner property being viewed (auto-populates)
- **Misc**—Miscellaneous information (e.g., insurance, parking pass number, etc.) can be stored here. Contains company-defined, reportable fields unique to a homeowner (e.g., pool pass so lifeguard knows who can access pool, condo parking spaces, etc.)

## Work Orders

### Submit Work Order

Work orders may be submitted for homeowners through CINC. To submit a work order, complete the following steps:

1. Select **Homeowners/Homeowners** and search for and select the desired association and homeowner. Click on the **W/Os** tab at the bottom of the screen to open the *Work Order List* screen. **\*NOTE:** The *Work Order List* screen may also be accessed by selecting **Vendors/Work Orders**

Exhibit 18: Work Order Tab

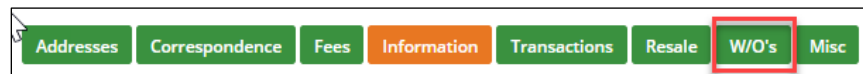


Exhibit 19: Work Order List Screen

The screenshot shows the 'Work Order List - Jason Stevenson' interface. At the top, there are buttons for 'New', 'Delete', 'Completed', 'Reopen', 'Print', 'Refresh', and 'Cancel'. Below these are search filters for Vendor, Status, Work Location, and WO Type. A table lists work orders with columns for WO #, Created, Printed / Emailed, Due, Type / Description, Vendor, Work Location, and Status. The third row, with WO # 7460, is highlighted with a red box. The table data is as follows:

| WO # | Created    | Printed / Emailed              | Due        | Type / Description           | Vendor                                       | Work Location                    | Status         |
|------|------------|--------------------------------|------------|------------------------------|----------------------------------------------|----------------------------------|----------------|
| 3369 | 05/21/2020 | P/E: 05/21/2020                | 06/11/2020 | Common Area / test           | A Bright Idea                                | Jason Stevenson 6566 Purple Lane | Awaiting Quote |
| 3370 | 05/26/2020 | P: 03/03/2021<br>E: 05/26/2020 | 06/16/2020 | Common Area / cinc test      | 1 Swipe Window Cleaning<br>Insurance Expired | Jason Stevenson 6566 Purple Lane | Open           |
| 7460 | 03/22/2021 |                                | 04/12/2021 | Light Out / Fix Broken Light |                                              | Jason Stevenson 6566 Purple Lane | Open           |

2. Click on a work order number to view an existing one or click **New** to open a new Work Order screen

Exhibit 20: New Work Order Screen

The screenshot shows the 'New Work Order' form. It includes fields for Association (ABC Condo association), Work Order # (7460), Type (Light Out), Description (Fix Broken Light), Estimate Total (\$50.00), Due Date (04/12/2021), and Follow Up Date (04/15/2021). The 'Work Location' section contains fields for Name (Jason Stevenson), Address (6566 Purple Lane), City, State, Zip (Grayson, GA, 32665), and buttons for 'Select Homeowner' and 'or Common Areas'. The 'Contacts' section has a table with columns for Contact (Address Type), Email, and Phone. The 'Work Assigned To' section has a 'Vendor' field (1000bulbs.com). The bottom section is for 'Vendor Contact' with fields for Phone, Cell, Fax, and Email.

| Contact (Address Type)             | Email                | Phone        |
|------------------------------------|----------------------|--------------|
| Jason Stevenson (Property Address) | jstevenson@gmail.com | 800-555-1212 |

3. Fill out the information below, then click **Save** when finished:
- **Association**
  - **Work Order #**—Automatically assigned when **Save** or **Save & New** is clicked
  - **Type**—Type of work to be done, location, etc. Examples are *Clubhouse*, *Common Area*, *Light Out*, *Plumbing Issue*, etc. These are set up under **System/Dropdown Options: Work Order Type**
  - **Status**: Current status of work order:
    - Approved
    - Awaiting Quote
    - Closed
    - Open
    - Pending
    - Submitted
  - **Description**
  - **Estimate Total**
  - **Due Date**
  - **Follow Up Date**
  - **Work Location**: default is the current property. A work location must be assigned (e.g., a common area like the clubhouse)
    - *Name*—auto-fills homeowner name
      - Click the  under **Select Homeowner** to clear the field and add a different homeowner. Click **Yes** on popup to continue substitution or **No** to cancel
      - Click the  under **or Common Areas** to unlink the current homeowner and select a common area instead. Click **Yes** on popup to continue substitution or **No** to cancel
    - *Address*
    - *City, State, Zip*
  - **Contacts**: Add additional contacts by clicking **Add (A)**. It can be anyone, such as someone who is going to let the repairman in. The contact can be saved as an additional contact
    - *Contact (Address Type)*—Defaults to homeowner name. Lists address type under name
    - *Email*
    - *Phone*
  - **Work Assigned to**: Assign the work to a vendor that is already set up (**B**)
    - *Vendor*
    - *Check Name*
  - **Attachments**—Drop files in this space or click **Browse** to find and upload a file
    - *Date*
    - *File Name*
    - *Size*



- **Work Order Notes (C)**
  - *Date*
  - *Public (checkbox). If checked, this work order will display on the web site (D)*
  - *Email (Work Location or Vendor)*
  - *Note*

**Exhibit 21: Completed Work Order**

**Work Order**

Save Save & New Completed Print Email Refresh Cancel Quick Message Dashboard

Association: ABC Condo association  
Work Order #: 7460 Created By: Beth Still on 03/22/2021 06:43:30 PM  
Type: Light Out Status: Open  
Description: Fix Broken Light  
Estimate Total: \$50.00 Due Date: 04/12/2021 Follow Up Date: 04/15/2021

**Work Location**

Name: Jason Stevenson Select Homeowner or Common Areas  
Address: 6566 Purple Lane  
City, State, Zip: Grayson GA 32665

**Contacts**

Contact (Address Type) Email Phone  
Jason Stevenson (Property Address) jstevenson@gmail.com 800-555-1212

**Work Assigned To**

Vendor: 1000Bulbs.com

**Vendor Contact**

| Phone              | Cell | Fax | Email |
|--------------------|------|-----|-------|
| No data to display |      |     |       |

**Attachments**

| Date                                 | File Name | Size |
|--------------------------------------|-----------|------|
| Drop files to attach or click Browse |           |      |

**Work Order Notes**

Expand Notes Add Remove

| Date                                           | Public                                       | Email                                                                     | Note                                                                                                                               |
|------------------------------------------------|----------------------------------------------|---------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 03/22/2021 07:11:15 PM<br>By User - Beth Still | <input checked="" type="checkbox"/> <b>D</b> | <input type="checkbox"/> Work Location<br><input type="checkbox"/> Vendor | Email to : beth.still@cincsystems.com<br>Please fix this broken light before someone trips and falls<br>Work order report attached |

Work Order Line Items Invoices Payments

The new work order now appears in the homeowner's work order list

**Exhibit 22: New Work Order in List**

**Work Order List - Jason Stevenson**

New Delete Completed Reopen Print Refresh Cancel Save View Quick Message Dashboard

Vendor: (All Vendors) Work Order #: ABC Condo association  
Status: (All Open Statuses) For Dates: Jason Stevenson  
Work Location: Homeowner  
WO Type: (All Types)

Common Area Unlinked Work Location Unlinked/No Vendor

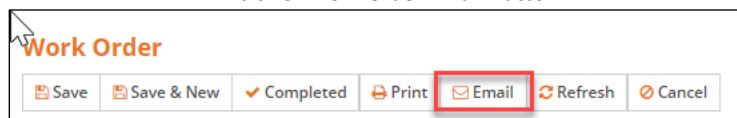
| WO #                  | Created    | Printed / Emailed              | Due        | Type / Description           | Vendor                                    | Work Location                    | Status         |
|-----------------------|------------|--------------------------------|------------|------------------------------|-------------------------------------------|----------------------------------|----------------|
| ABC Condo association |            |                                |            |                              |                                           |                                  |                |
| 3369                  | 05/21/2020 | P/E: 05/21/2020                | 06/11/2020 | Common Area / test           | A Bright Idea                             | Jason Stevenson 6566 Purple Lane | Awaiting Quote |
| 3370                  | 05/26/2020 | P: 13/03/2021<br>E: 05/26/2020 | 06/16/2020 | Common Area / cinc test      | 1 Badge Window Cleaning Insurance Expired | Jason Stevenson 6566 Purple Lane | Open           |
| 7460                  | 03/22/2021 |                                | 04/12/2021 | Light Out / Fix Broken Light |                                           | Jason Stevenson 6566 Purple Lane | Open           |

Total # 3 / Selected: 0

## Email Work Order

To email the work order to the vendor, click **Email** from the *Work Order* screen.

**Exhibit 23: Work Order Email Button**



Enter the following fields:

- **From**—Will prefill with the email address of the CINC user submitting the work order
- **To**—Will prefill with the email address of the selected work location. To send the work order to the vendor, click on the magnifying glass and select the vendor's email address. Click **Save**
- **CC**—Enter an additional email address, or click on the magnifying glass to select additional recipients
- **BCC**—Enter an additional email address, or click on the magnifying glass to select additional recipients
- **Subject**—Will prefill with the work order description and number. Make changes if applicable
- **Message**—Enter the body of the email in the message field
- **Generate Work Order Report/Attach**—Will attach a PDF report version of the work order to the email sent to the selected recipients

**Exhibit 24: Send Email Screen**

A screenshot of the 'Send Email' dialog box. The title bar is green with a close button. Below the title bar are two buttons: 'E-Mail' (with an envelope icon) and 'Cancel'. The 'E-Mail' button is highlighted with a red rectangle. The form contains the following fields:

- From:** beth.still@cincsystems.com x
- To:** jstevenson@gmail.com x (with a magnifying glass icon)
- CC:** Rick@1000Bulbs.com x (with a magnifying glass icon)
- BCC:** (empty) (with a magnifying glass icon)
- Subject:** RE: Fix Broken Light (WO# 7460)
- Message:** Please fix this broken light before someone trips and falls

At the bottom left of the message field, it says '59 / 7000'. Below the message field is a table with three columns: 'Attachments', 'Date', and 'Size'. The first row has a checked checkbox in the 'Attachments' column and the text 'Generate Work Order report and attach'.

**Exhibit 25: Work Order Report**

|                                                                                                                                                                                                                                                                                                                                                                                                                                              |       | <b>Work Order</b><br>ABC Condo association<br># 7460                                                                                                         |     | <b>Date:</b> 3/22/2021<br><b>Time:</b> 7:12 pm<br><b>Page:</b> 1 |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|------------------------------------------------------------------|------------------------|--|--|--|--|---------------------|-------|--------|--|--|---------------------------------------|--|----|--|--|----------------------------------------|--|--|--|--|-----------------|--|--|--|--|------|-------|------|-----|-------|
| <b>Issue Date:</b> 03/22/2021<br><b>Due Date:</b> 04/12/2021<br><b>Quote/Estimate:</b> \$50.00                                                                                                                                                                                                                                                                                                                                                                                                                                |       | <b>Management Company:</b> CINC Training Environment<br><b>Property Manager:</b><br><b>Phone:</b> (678) 205-1465 <b>Fax:</b> (678) 205-1469<br><b>Email:</b> |     |                                                                  |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
| <b>Location:</b> 6566 Purple Lane<br>Grayson, GA 32665<br><br><b>Description:</b> Fix Broken Light                                                                                                                                                                                                                                                                                                                                                                                                                            |       |                                                                                                                                                              |     |                                                                  |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
| <table border="0"> <thead> <tr> <th colspan="5">Work Location Contacts</th> </tr> <tr> <th>Name (Address Type)</th> <th>Email</th> <th colspan="3">Phones</th> </tr> </thead> <tbody> <tr> <td>Jason Stevenson<br/>(Property Address)</td> <td></td> <td colspan="3">W:</td> </tr> <tr> <td colspan="5"> <b>Work Assigned To:</b> 1000Bulbs.com               </td> </tr> <tr> <th colspan="5">Vendor Contacts</th> </tr> <tr> <th>Name</th> <th>Phone</th> <th>Cell</th> <th>Fax</th> <th>eMail</th> </tr> </tbody> </table> |       |                                                                                                                                                              |     |                                                                  | Work Location Contacts |  |  |  |  | Name (Address Type) | Email | Phones |  |  | Jason Stevenson<br>(Property Address) |  | W: |  |  | <b>Work Assigned To:</b> 1000Bulbs.com |  |  |  |  | Vendor Contacts |  |  |  |  | Name | Phone | Cell | Fax | eMail |
| Work Location Contacts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |       |                                                                                                                                                              |     |                                                                  |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
| Name (Address Type)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Email | Phones                                                                                                                                                       |     |                                                                  |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
| Jason Stevenson<br>(Property Address)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |       | W:                                                                                                                                                           |     |                                                                  |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
| <b>Work Assigned To:</b> 1000Bulbs.com                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |       |                                                                                                                                                              |     |                                                                  |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
| Vendor Contacts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |       |                                                                                                                                                              |     |                                                                  |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
| Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Phone | Cell                                                                                                                                                         | Fax | eMail                                                            |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |
| <b>Notes &amp; Instructions</b><br>3/22/2021      Email to : beth.still@cincsystems.com Reason :Please fix this broken light before someone trips and falls<br>Work order report attached                                                                                                                                                                                                                                                                                                                                     |       |                                                                                                                                                              |     |                                                                  |                        |  |  |  |  |                     |       |        |  |  |                                       |  |    |  |  |                                        |  |  |  |  |                 |  |  |  |  |      |       |      |     |       |

Once the email is sent, actions taken will be tracked under the Work Order Notes section. GL expense accounts associated with the work order, as well as invoices and payments, may be viewed from the *Work Order* screen. Submitted work orders will also be tracked on the homeowner's profile.

**\*NOTE:** If a homeowner submits a work order from the CINC website, a notification will be sent to the email address listed on the Web Notifications screen. The recipient will then complete the steps as described above.

## Payment Search

The *Payment Search* screen is used to search for specific check numbers and dollar amounts of payments made by homeowners. To search for a payment, complete the following steps:

1. Select **Homeowners/Payment Search**, then search for and select the desired association, or choose *All Associations*
2. Complete any of the following fields to search for a specific payment, and click **Refresh**:
  - Check Number
  - Date Range
  - Amount
  - Description

Transactions matching the search criteria will display on the screen.

**Exhibit 26: Payment Search Screen**

| Date       | Check/Ref No | Homeowner | Description | Amount     |
|------------|--------------|-----------|-------------|------------|
| 06/09/2020 | 66587        | Bob Ross  |             | (\$600.00) |

3. Click on the homeowner's name to go to the *Transaction History* screen

**Exhibit 27: Transaction History Screen**

| Date      | Description                                  | Batch | Amount   | Paid | Balance  |
|-----------|----------------------------------------------|-------|----------|------|----------|
|           | Assessment - Builder 2019                    |       |          |      | \$45.00  |
|           | Previous Balance                             |       | \$45.00  |      |          |
|           | Assessment - Homeowner (Delinquent Fee) 2020 |       |          |      | \$500.00 |
|           | Previous Balance                             |       | \$500.00 |      |          |
|           | Assessment - Homeowner (Delinquent Fee) 2021 |       |          |      | \$30.00  |
| 1/16/2021 | Assessment - Homeowner                       | 21691 | \$10.00  |      |          |

## Vendor Information

### Vendor Search

Vendors created in CINC are part of a global list of vendors for all associations. Vendors are searchable by the following information: *Name, Address, Vendor Type, DBA Name, and Check Name*. To search for a vendor, complete the following steps:

1. Select **Vendors/Vendors**, then select the desired criteria from the dropdown (see *Exhibit 28*) and enter the description in the search field. Click **Refresh**. **\*NOTE: Inactive vendors will have a red dot beside their name**
2. To save the current search criteria preferences, click **Save View**. This will set your preferences as the default when you visit the Vendors screen.

**Exhibit 28: Vendor List Screen**

| Name                                                                                  | Contact Name / Email / Phone                  | Type              | Status | ACH | Rating |
|---------------------------------------------------------------------------------------|-----------------------------------------------|-------------------|--------|-----|--------|
| 1 Above Elevator Inspections<br>My Street                                             | John Smith<br>(720) 243-3042                  | Architectural     | Active | Yes | ☆☆☆☆   |
| 1 Swipe Window Cleaning<br>CK Name: 1 Swipe Window Cleaning<br>3001 Executive Dr #260 | Joe Smith<br>joe@1swipe.net<br>(720) 772-7777 | Doors and Windows | Active | Yes | ☆☆☆☆   |

### Vendor Review

Once a vendor is selected from the vendor list, the following information is available for review:

1. Select Vendors/Vendors and click **New**

**Exhibit 29: Create New Vendor**

| Vendor List  |        |       |       |         |        |
|--------------|--------|-------|-------|---------|--------|
| <b>+ New</b> | Delete | Merge | Excel | Refresh | Cancel |

The **Vendor** screen will display. The top portion of the screen is basic vendor information.

**Exhibit 30: Vendor Information—Top Section**

The screenshot shows the 'Vendor' form with the following fields and controls:

- Buttons:** Save, Save & New, Refresh, Cancel, Quick Message, Dashboard.
- Name:** Text input field.
- Status:** Dropdown menu set to 'Active'.
- Type:** Dropdown menu set to 'AC Repairing'.
- Print 1099 Type:** Radio buttons for 'None' (selected), 'MISC', and 'NEC'.
- DBA:** Text input field.
- 1099 Box 10:** Toggle switch (off).
- Tax ID:** Text input field.
- Consolidate Checks:** Toggle switch (off).
- Ind. Contractor:** Toggle switch (off).
- Check Name:** Text input field.
- Auto Aprv Lmt:** Text input field set to '\$0.00'.
- Net Term (days):** Text input field set to '0'.
- Exempt From VIVE:** Toggle switch (off).
- User Msc 1:** Text input field.
- User Msc 2:** Text input field.
- User Defined 3:** Text input field.
- User Defined 4:** Text input field.

| Field Name              | Type           | Field Description (Blue fields are required)                                                                                                                                                                                                                                                                                |
|-------------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name                    | Fillable field | Vendor Name                                                                                                                                                                                                                                                                                                                 |
| Rating                  | Toggle         | Not applicable                                                                                                                                                                                                                                                                                                              |
| Status                  | Dropdown       | These are set up under System/Dropdown Options                                                                                                                                                                                                                                                                              |
| Type                    | Dropdown       | Mgmt Co                                                                                                                                                                                                                                                                                                                     |
| Print 1099              | Toggle         | None/MISC/NEC                                                                                                                                                                                                                                                                                                               |
| DBA (Doing Business As) | Fillable field | Enter if vendor is known by another name. This name can also be used when searching for a vendor                                                                                                                                                                                                                            |
| 1099 Box 10             | Toggle         | Toggle on if vendor is a 1099 attorney                                                                                                                                                                                                                                                                                      |
| Tax ID                  | Fillable field | Required if the <b>Print 1099</b> box is MISC or NEC                                                                                                                                                                                                                                                                        |
| Consolidate Checks      | Toggle         | Any invoices posted for payment to this vendor for the same association and the same date will be combined into one check. <b>*NOTE: Details of each invoice (invoice number, date, item description-expense GL, amount for each invoice on consolidated check) included in the payment will be shown on the check stub</b> |
| Ind. Contractor         | Toggle         | If the <b>Ind. Contractor</b> toggle is switched on and an EIN format is entered in the Tax ID field (xx-xxxxxxx), then a <b>Social Security Number</b> field will appear on the <i>Vendor Information</i> screen. Conversely, if the <b>Ind. Contractor</b> toggle is off, the <b>SSN</b> field will not display           |
| Check Name              | Fillable field | The name to be printed on the check if different than legal name (optional)                                                                                                                                                                                                                                                 |
| Auto Aprv Lmt           | Fillable field | This dollar amount limit can be set up for vendors that will not require an approval (e.g., utility vendors). Any invoice over amount set here will need approval (optional)                                                                                                                                                |
| Net Term (Days)         |                | Vendor's net term days (30/60/90). Used when invoice is entered                                                                                                                                                                                                                                                             |
| Exempt from VIVE        | Toggle         | Not currently used                                                                                                                                                                                                                                                                                                          |
| User Defined 1          |                | This field may be used to store additional information regarding the vendor. A global change to relabel the field may be completed under <b>System/User Defined Fields</b> by users with necessary permissions                                                                                                              |

| Field Name     | Type | Field Description (Blue fields are required)                                                                                                                                                                   |
|----------------|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| User Defined 2 |      | This field may be used to store additional information regarding the vendor. A global change to relabel the field may be completed under <b>System/User Defined Fields</b> by users with necessary permissions |
| User Defined 3 |      | This field may be used to store additional information regarding the vendor. A global change to relabel the field may be completed under <b>System/User Defined Fields</b> by users with necessary permissions |
| User Defined 4 |      | This field may be used to store additional information regarding the vendor. A global change to relabel the field may be completed under <b>System/User Defined Fields</b> by users with necessary permissions |

The next section is **Areas Served**. Select **State(s)** and **City(s)** that the vendor services.

**Exhibit 31: Vendor Information—Areas Services Section**

Areas Served

States

(Select States)

Cities

(Select Cities)

The next section is **ACH Information**. **\*NOTE:** *In order to pay a vendor by ACH, the association making payment to the vendor must be banking with a partner bank that has the proper settings enabled.*

**Exhibit 32: Vendor Information—ACH Section**

ACH Information

Routing:

Account:

Type:

(Choose Type)

Notification Email:

| ACH INFORMATION    |                |                                                                                                                      |
|--------------------|----------------|----------------------------------------------------------------------------------------------------------------------|
| Routing            | Fillable field | Routing number of vendor's bank                                                                                      |
| Account            | Fillable field | Bank Account number for vendor                                                                                       |
| Type               | Dropdown       | Type of bank account (Business or Individual)                                                                        |
| Notification Email | Fillable field | CINC will send an email to the address added in this field when the payment is deposited to the vendors bank account |

The next section is the **Primary Contact Information** section. **\*NOTE:** *The address entered in this section will be the address used on checks printed to this vendor. It will also be the vendor contact information used for work orders.*

**Exhibit 33: Vendor Information—Primary Contact Section**

| Primary Contact Information |                      |            |                                |
|-----------------------------|----------------------|------------|--------------------------------|
| Contact Name:               | <input type="text"/> | Title:     | <input type="text"/>           |
| Address 1:                  | <input type="text"/> | Address 2: | <input type="text"/>           |
| City:                       | <input type="text"/> | State:     | <input type="text" value="▼"/> |
| Zip Code:                   | <input type="text"/> | Phone:     | <input type="text"/>           |
| Fax:                        | <input type="text"/> | Cell:      | <input type="text"/>           |
| Email:                      | <input type="text"/> |            |                                |

| PRIMARY CONTACT INFORMATION |                |                                    |
|-----------------------------|----------------|------------------------------------|
| Contact Name                | Fillable field | Primary contact name at vendor     |
| Title                       | Fillable field | Title of primary contact           |
| Address 1                   | Fillable field | Street address of vendor           |
| Address 2                   | Fillable field | Secondary street address of vendor |
| City                        | Fillable field | Vendor's city                      |
| State                       | Fillable field | Vendor's state                     |
| Zip Code                    | Fillable field | Vendor's Zip Code                  |
| Phone                       | Fillable field | Vendor's phone number              |
| Fax                         | Fillable field | Vendor's fax                       |
| Cell                        | Fillable field | Vendor's cell phone number         |
| Email                       | Fillable field | Vendor's email address             |

The next section (**Insurance Info**) is accessed by clicking the **Insurance Info** tab.

**Exhibit 34: Insurance Info Tab Screen**

| Insurance Info                                       |                          | License Info                                                  |                      |                                |
|------------------------------------------------------|--------------------------|---------------------------------------------------------------|----------------------|--------------------------------|
| Type                                                 | Required                 | Carrier                                                       | Account              | Expiration                     |
| Worker's Comp                                        | <input type="checkbox"/> | <input type="text"/>                                          | <input type="text"/> | <input type="text" value="📅"/> |
| General Liability                                    | <input type="checkbox"/> | <input type="text"/>                                          | <input type="text"/> | <input type="text" value="📅"/> |
| Directors & Officers Liability                       | <input type="checkbox"/> | <input type="text"/>                                          | <input type="text"/> | <input type="text" value="📅"/> |
| Drown Insurance                                      | <input type="checkbox"/> | <input type="text"/>                                          | <input type="text"/> | <input type="text" value="📅"/> |
| Insurance Attachments                                |                          | Files over 10 MB will not be uploaded. <a href="#">Remove</a> |                      |                                |
| Date                                                 | File Name                | Size                                                          |                      |                                |
| Drop files to attach or click <a href="#">Browse</a> |                          |                                                               |                      |                                |



| INSURANCE INFO                                                                                                      |                         |                                                                                                                                                                                                                                               |
|---------------------------------------------------------------------------------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Examples of Type: Workers Comp, General Liability, Directors & Officers, etc. created under System/Dropdown Options |                         |                                                                                                                                                                                                                                               |
| Required                                                                                                            | Toggle                  | Set in "On" position if required                                                                                                                                                                                                              |
| Carrier                                                                                                             | Fillable field          | Name of insurance carrier                                                                                                                                                                                                                     |
| Account                                                                                                             | Fillable field          | Insurance policy/account number                                                                                                                                                                                                               |
| Expiration                                                                                                          | Date                    | Date the policy expires. <b>*NOTE:</b> An alert may be turned to notify CINC users of an upcoming insurance expiration and/or an email notification may be set up on <b>System/Company Profile settings</b> tab to alert vendor of expiration |
| Insurance Attachments                                                                                               | Browse or drag and drop | Attach or remove documents such as policies, etc.                                                                                                                                                                                             |

The next section (**License Info**) is accessed by clicking the **License Info** tab.

**Exhibit 35: License Info Screen**

| LICENSE INFO                                                                              |                       |                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Examples of Type: Plumbing, HVAC, Electrician, etc. created under System/Dropdown Options |                       |                                                                                                                                                                                                      |
| Required                                                                                  | Checkbox              | Check if required                                                                                                                                                                                    |
| Description                                                                               | Fillable field        | Name of carrier                                                                                                                                                                                      |
| License #                                                                                 | Fillable field        | License number                                                                                                                                                                                       |
| Expires                                                                                   | Date                  | Date the license expires <b>*NOTE:</b> An email notification may be set up on <b>System/Company Profile settings</b> tab under <b>Settings/Vendor Module – License</b> to alert vendor of expiration |
| License Attachments                                                                       | Browse or drag & drop | Attach or remove documents such as policies, etc.                                                                                                                                                    |

Once the new vendor information is saved, additional tabs will be available on the vendor profile at the bottom of the screen:

**Exhibit 36: Vendor Screen Tabs**

- **Contacts:** Additional contacts may be added to the vendor profile to record contacts for billing etc.
- **Accounts:** defines default expense G/L for that vendor (to prepopulate on an invoice for this vendor) This function pre-dates the ability to flag invoices as recurring but still may be used
- **Prior 1099:** Vendor balances paid outside of CINC with a prior software company for the association or management company during the fiscal year may be added to this screen to include the amounts

on the vendor's 1099. **\*NOTE:** This information may also be added from the Association Information – 1099 Tab

- **Payment Method:** Preferred payment methods (ACH or check) per association may be selected for the vendor. **\*NOTE:** This tab is only available for vendors for which ACH information has been entered
- **Notes:** Vendor correspondence information may be saved on the **Notes** tab (see *Adding Vendor Notes*)
- **Misc:** Used to create a field that does not exist in the system. Miscellaneous information regarding the vendor may be stored on the Miscellaneous tab in relation to the *Misc Field Category* dropdown options. **\*NOTE:** See System Administrator to determine who is responsible for setting up Miscellaneous Information fields

### Adding Vendor Notes

Vendor notes and attachments may be added to the vendor profile to record information such as insurance policies, email communications, and other important documents. To add a note to a vendor profile, complete the following steps:

2. Select **Vendors/Vendors** and search for and select the desired vendor. Click on the **Notes** tab and click **New**

**Exhibit 37: Vendor Notes History Screen**

The screenshot displays the 'Notes History - 5 Star Metals' interface. At the top, there are buttons for 'Save', 'Refresh', and 'Cancel', along with 'Help' and 'Dashboard' links. Below these is a table header with columns: 'Date', 'Next Contact', 'Entered By', and 'Note Type'. The table body is empty, showing 'No data to display'. Under the table, there are several input fields and dropdown menus: 'Description:' (text input), 'Status:' (dropdown), 'Note Date:' (date input, showing 06/29/2020), 'Next Contact:' (text input), 'Template:' (dropdown), 'Corr Type:' (dropdown, 'Select a Correspondence Type'), and 'Note Type:' (dropdown, 'Select Note Type'). A 'Go' button is next to the Template dropdown. At the bottom, there is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and text color.

3. Enter the following information, and click **Save**:

**Description:** Enter a description for the note **\*NOTE:** CINC recommends defining a list of standard descriptions so that all users are using a consistent description in this field (e.g. Vendor Insurance Policy, etc.)

**Corr Type:** Correspondence type dropdown (e.g. *Letter, Note-General, Phone Call*)

**Status:** dropdown (e.g. *Open, Pending, Closed*)

**Note Date:** Defaults to current date but may be changed

**Note Type:** Note type dropdown (e.g. *Email, Letter, Note, Phone Call*)

**Next Contact:** works in conjunction with alerts; if alert is turned on and this field is populated, an alert will be generated to follow up. An alert for a *Next Contact Reminder* may be set under **File/Alerts/Reminders**

**Template:** dropdown; form letters for vendor correspondence templates (e.g. Termite Inspection Notice). See section

*Preferred Vendor Setup*

**Note Area:** Type a note in the text editor area to be saved for future reference

4. When the note is saved, an **Attachments** link will appear. Click **Manage**, then browse to and select the desired document. Click **Save**. Click **View** to view the attachment(s)

*Exhibit 38: Notes History Screen*

**Notes History - 5 Star Metals**

+ New Save Delete PDF Email Refresh Cancel Help Dashboard

| Date       | Next Contact | Entered By  | Note Type |
|------------|--------------|-------------|-----------|
| 06/29/2020 |              | CINC Assist | Contract  |

Description: Closing Corr Type: Closing/Resale Documents

Status: Open Attachments: (Select Attachment) Manage View

Note Date: 06/29/2020 Note Type: Contract

Next Contact:

Template: (Select a Template) Go

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

This is a test note

### Editing Vendor Notes

Existing vendor notes and attachments may be edited in order to add new notes and attachments. To edit an existing note for a vendor, complete the following steps:

1. Select **Vendors/Vendors** and search for and select the desired vendor. Click on the *Notes* tab, then click on the date of an existing note and click **New**
2. Type a new note in the text area, use the template selection to generate a letter, or click **Manage** to add a new attachment and click **Save**
3. Select *Vendors/Vendors* and search for and select the desired vendor. Click on the *Notes* tab and click **New**

### Preferred Vendor Setup

To set up a vendor as a service provider for a specific association (i.e. preferred vendor list), follow these steps:

1. Select **Setup/Association Setup**, then select an association
2. Select the *Directory* tab at the bottom of the screen

Exhibit 39: Directory Tab

Info Addr Streets Sections Notes **Directory** Invoicing Users 1099 Sub Assoc Misc

3. Click the radio button next to **Service Providers**, then click **New**
4. Fill in fields as required, then click **Save**

Exhibit 40: Create New Service Provider

Service Providers - ABC Condo association

+ New Save Delete Excel Refresh Cancel

Help Dashboard

Show Board Members **Service Providers** Other Information

| Name                                                  | Type | Address                            | Email | Phone |
|-------------------------------------------------------|------|------------------------------------|-------|-------|
| <input type="checkbox"/> ARROWHEAD LANDSCAPE SERVICES |      | P.O. Box 17150<br>Golden, CO 80402 |       |       |

Contact Name:  Search Vendor  or Homeowner

Type: Select a Type

Address:

City, State Zip:

Home Phone:  Mobile Phone:

Work Phone:  Email:

Comment:

## Excel List of Vendors

The global list of vendors may also be viewed via an Excel spreadsheet. To create the Excel file, select **Vendors/Vendors**, and click **Excel**. Click **Open** or **Save** to view the document.

Exhibit 41: Vendor List Screen

Vendor List

+ New Delete Merge **Excel** Refresh Cancel

Save View Dashboard

Name Contains Filter Search

☐ Show Only ACH Vendors ☐ Show Inactive Vendors

| <input type="checkbox"/> | Name - / DBA / Check Name | Address | Contact Name / Email / Phone                  | Type              | Status | ACH |
|--------------------------|---------------------------|---------|-----------------------------------------------|-------------------|--------|-----|
| <input type="checkbox"/> | 1 Swipe Window Cleaning   |         | Joe Smith<br>joe@1swipe.net<br>(770) 777-7777 | Doors and Windows | Active | Yes |

## Vendor Invoices

### User Preferences

Preferences can be set per user to control the following invoice options: *Duplicate Range*, *Vendor Checks*, *Default Zoom*, *Auto-Display Image*, and *Approval Requirements* (per association). To set user preferences, complete the following steps:

1. Select **System/User Preferences**. Under the **Invoice Options** heading, complete the following fields and click **Save**:

- **Duplicate Range**—Number of days for which an invoice cannot be duplicated. If an invoice has the same date, number, and amount within this timeframe, the user will be alerted. The system default is 30 days
- **Display Last Vendor Checks**—Number of previous checks displayed at a time per vendor. Up to 20 transactions may be displayed at a time. CINC recommends displaying a minimum of three checks
- **Assign Invoice Default Zoom**—Select the preferred zoom size for invoices
- **Auto-Display Image**—dropdown; Y/N. Does user want to display invoice image on invoice screen

Exhibit 42: Invoice Options Section

| Invoice Options                    |                                                                                              |
|------------------------------------|----------------------------------------------------------------------------------------------|
| Duplicate Range (days)             | <input type="text" value="30"/>                                                              |
| Display Last Vendor Checks (count) | <input type="text" value="0"/> (enter 0 to disable, 20 max)                                  |
| Invoice Default Zoom               | <input type="text" value="1x"/> ▼ (Assign Invoice and Pending Approval - Image View screens) |
| Auto Display Image                 | <input type="text" value="No"/> ▼ (Invoice screen)                                           |

- Set up approval requirements: Select **Setup/Association Setup**, then search for and select the desired association. Click on the **Invoicing** tab at the bottom of the screen to display the **Invoicing Privileges** screen. **\*NOTE:** Can also be set up via User Profile in the wizard

Exhibit 43: Invoicing Privileges Screen

| Invoicing Privileges - ABC Condo association                              |                          |                                                                              |
|---------------------------------------------------------------------------|--------------------------|------------------------------------------------------------------------------|
| <input type="button" value="Save"/> <input type="button" value="Cancel"/> |                          | <input type="button" value="Help"/> <input type="button" value="Dashboard"/> |
| Total Approvals Required <input type="text"/>                             |                          |                                                                              |
| Activity Log                                                              |                          |                                                                              |
| Add                                                                       | Req                      | Authorized                                                                   |
| <input type="checkbox"/>                                                  | <input type="checkbox"/> | Training User(Administrator)                                                 |
| <input type="checkbox"/>                                                  | <input type="checkbox"/> | Training User 1(Training)                                                    |
| <input type="checkbox"/>                                                  | <input type="checkbox"/> | Training User 2(Training)                                                    |
| <input type="checkbox"/>                                                  | <input type="checkbox"/> | Administrator(Administrator)                                                 |
| <input type="checkbox"/>                                                  | <input type="checkbox"/> | Training User 11(Training)                                                   |
| <input type="checkbox"/>                                                  | <input type="checkbox"/> | Theresa Beck(Administrator)                                                  |

- Determine the total number of internal approvals (users at management company) required for invoices for the specific association and enter that number in the **Total Approvals Required** box. Check the **Add** box next to the name of the person(s) who is authorized to approve invoices and click **Save** to add them to the “Authorized” column. **\*NOTE:** CINC does not recommend requiring a specific user’s approval because the invoice cannot be paid without required approvals
- Determine the total board approvals required for invoices and enter that number in the **Total Board Approvals Required** box. Check the box next to the **Vendor Type** requiring board approval and click **Save**. (Typical monthly charges, e.g. utilities, may not require board approval). **\*NOTE:** Board members will approve invoices from the CINC WebAxis website

**Exhibit 44: Board Approvals Required**

|                                                                                      |   |
|--------------------------------------------------------------------------------------|---|
| Total Board Approvals Required                                                       | 0 |
| <input checked="" type="checkbox"/> Invoices for Vendor Types Needing Board Approval |   |
| <input type="checkbox"/> Not Assigned                                                |   |
| <input type="checkbox"/> Alarm                                                       |   |
| <input type="checkbox"/> Architectural                                               |   |
| <input type="checkbox"/> Attorney                                                    |   |

5. Determine whether the board members or the management company approves invoices first as part of the invoice approval process. Select **System/Company Profile** and select either *Board* or *Management Company* from the **Initial Invoice Approval Order** dropdown. Click **Save**. **\*NOTE:** *this is a global setting for all invoices and associations*



CINC recommends that the management company be selected as initial approver to ensure invoice information is correct.

**Exhibit 45: Initial Invoice Approval Order**

|                                  |                                                                  |                                                                      |
|----------------------------------|------------------------------------------------------------------|----------------------------------------------------------------------|
| Allow Invoice Auto Approval      | <input checked="" type="checkbox"/> On Assign Invoices Screen    | <input checked="" type="checkbox"/> On Recurring Invoice List Screen |
| Initial Invoice Approval Order   | <div> Management <div> Board Management Company </div> </div>    |                                                                      |
| Show Invoice Expense GL to Board | <input type="checkbox"/> (applies to Board Approval on CINC Web) |                                                                      |
| Max Signature Amount             | \$0.00                                                           |                                                                      |

### Vendor Invoices Overview

The *Vendor Invoices* screen allows users to search for and pay invoices. To search for invoices, select **Vendors/Invoices**, then search for and select the desired association or ALL associations. Complete any or all of the following fields, then click **Refresh**:

- **Vendor**—Vendor Name. (All Vendors) is default
- **Invoice #**
- **Status**—All Statuses, Hold, Needs GL Completed, Paid, Pending Approval, Ready for Payment (default), or Void
- **Expense GL Account**—GL account number from which the invoice was paid
- **Date Range**
- **Pay By**—Payment Method (ACH, check, etc.)
- **Amount Range**
- **Memo**—Check memo line
- **Item Description**



To save specific search criteria, select the desired filter settings and click **Save View**.

**Exhibit 46: Invoice List Screen**

Invoices are also searchable using the Quick Search Grid Filters (green bar):

- **Invoice Date**
- **Due Date**
- **Invoice Number**
- **Invoice Amount**
- **Balance**
- **Status/Approvals**
- **Pay To**

Search results may display the following invoice flags:

**Exhibit 47: Invoice Flags**

- **Pay by ACH**—Indicates that the invoice was paid by ACH
- **Closed Period**—Displays when an attempt is made to post an invoice in a closed fiscal period
- **Invalid GL**—Displays when an invalid GL account is selected or the GL account is missing
- **Over Signature Amount**—Displays when the amount of the invoice is over the allowed signature amount for approval. \*NOTE: Signature amounts can be set up on the Association page, in the Max Signature Amount field
- **Unbalanced (Invoice)**—Displays when the invoice total does not match the sum of the expense line items
- **Duplicate (Invoice)**—Displays when the invoice is a potential duplicate (flagged by vendor, amount, and invoice number)

- **Unlinked Vendor**—Displays when the “Pay To” field is not linked to a vendor in CINC
- **Invoices on Hold**—Indicates the number of invoices placed in the “Hold” status

To review additional flag details, hover over the color-coded dot on the invoice line to display a popup message box.

*Exhibit 48: Posting Issue Popup*

The screenshot displays a table of invoice lines with a 'Posting Issues Found' popup overlaid. The popup provides details on how duplicate invoices are identified. The background table includes columns for invoice status (checkbox), date, amount, and a 'View Multi' button. The popup is triggered by hovering over a blue dot on the second invoice line.

| Invoice Status           | Date                                      | Amount   | Action                     |
|--------------------------|-------------------------------------------|----------|----------------------------|
| <input type="checkbox"/> | 01/30/2020                                | \$25.00  | <a href="#">View Multi</a> |
| <input type="checkbox"/> | 05/13/2020 12:13:09 PM Amy Avila training | \$550.00 |                            |
| <input type="checkbox"/> | 03/05/2020                                | \$25.00  |                            |

**Posting Issues Found**

**Duplicate Invoice**

This invoice is a potential duplicate invoice.

An invoice is considered a duplicate if another invoice meets the following criteria:

- The Invoices are assigned to the same Vendor.
- The Invoice #'s are the same.
- The Invoice Date is within the range specified by the Duplicate Range (days) setting on the User Preferences screen.



## Association Directory

### Set up Board Members

To set up board members in an association, follow these steps:

1. Select **Setup/Association Setup**
2. Type the name of the association in the search box or type “%” to pull all associations
3. Click **Refresh**
4. Choose the association to be edited by clicking on the association name

**Exhibit 49: Select Association**

Association List

+ New

- Delete

- Excel

Refresh

- Cancel

Quick Message

Name

Contains

Filter Search

Inactive Associations

| Association                                                                                                                                                                  | Code | Contact / Email / Phone                                                                        | Address                                                 | Web Keyword |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|------------------------------------------------------------------------------------------------|---------------------------------------------------------|-------------|
| <div><div><input type="checkbox"/></div><div><div>AB Collection</div><div>Accounting Method: Cash</div><div>Billable Units: 137 / Residents: 0</div></div></div>             | TGC  | Contact: Owner Services Department<br>Email: themintcompany@gmail.com<br>Phone: (678) 555-7777 | 2700 Windy Hill Point<br>Lawrenceville, 30046           |             |
| <div><div><input type="checkbox"/></div><div><div>ABC Condo association</div><div>Accounting Method: AP Accrual</div><div>Billable Units: 2 / Residents: 2</div></div></div> | PA9  | Contact:<br>Email:<br>Phone:                                                                   | C/O Condo assoc<br>123 any Street<br>Yonkers, NY, 10701 |             |
| <div><div><input type="checkbox"/></div><div><div>Accounting Demo</div><div>Accounting Method: Cash</div><div>Billable Units: 22 / Residents: 22</div></div></div>           | DEMO | Contact:<br>Email:<br>Phone:                                                                   | 500<br>Ridgeway Ln<br>Atlanta, GA, 30045                |             |

### Directory Tab

1. Click the **Directory** tab at the bottom of the page

**Exhibit 50: Go to Directory Screen**



2. For the **Show** option, select **Board Members**. This screen displays board members as well as committee members for an association
3. The **Board/Committee** dropdown allows the user to choose to view all member types, board members only or members of specific committees. The committee names should be created for this list from the **System/Dropdown** options screen

**Exhibit 51: Board Members Screen**

Board Members - ABC Condo association

+ New Save Delete Excel Refresh Cancel

Quick Message Help Dashboard

Show Board Members Service Providers Other Information

Board / Committee (All Types)

(All Types)  
ACC Committee  
Administrative Assistant  
ARC Committee  
Board  
Board Invoice Approval  
Paylease Error Test  
Social Committee

| Name / Title                              | Email | Phone |
|-------------------------------------------|-------|-------|
| Board                                     |       |       |
| <input type="checkbox"/> Joan Worthington |       |       |

Name

Type Select a Type

Board / Committee Select a Board or Committee

Responsibility Select a Responsibility

Address

City, State Zip

Home Phone

Work Phone

Comment

Board Login Select a Login

Term Expires

Board Title

Mobile Phone

Email

Info Addr Streets Sections Notes Directory Invoicing Users 1099 Sub Assoc Misc

4. To view existing member information, click on the member's name, title, address, or phone number from the grid. Their information will auto-populate in the bottom portion of the screen. To save this information, click **Save**

**Exhibit 52: Specific Board Member Info**

Board Members - ABC Condo association

+ New Save Delete Excel Refresh Cancel

Quick Message Help Dashboard

Show Board Members Service Providers Other Information

Board / Committee (All Types)

| Name / Title                              | Type / Responsibility | Address                               | Email | Phone |
|-------------------------------------------|-----------------------|---------------------------------------|-------|-------|
| Board                                     |                       |                                       |       |       |
| <input type="checkbox"/> Joan Worthington | President             | 8254 Purple Lane<br>Atlanta, GA 32351 |       |       |

Name

(Joan Worthington : 8254 Purple Lane)

Type President

Board / Committee Board

Responsibility Select a Responsibility

Address 8254 Purple Lane

City, State Zip Atlanta GA 32351

Home Phone

Work Phone

Comment

Board Login Select a Login

Term Expires

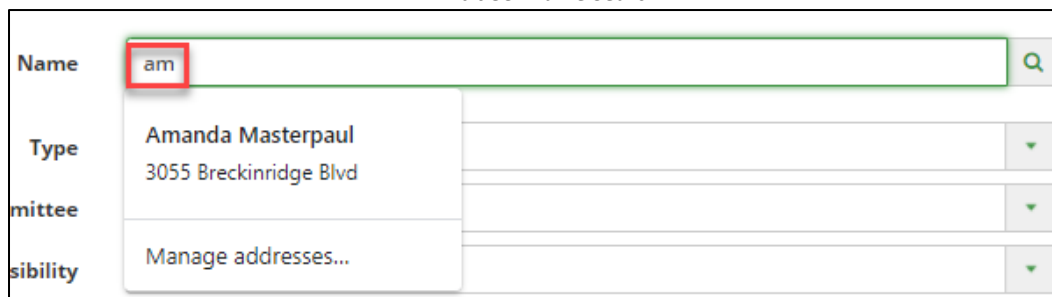
Board Title

Mobile Phone

Email

5. To add a new member to the board or to a committee, click **New**. Enter the name, part of the name, account number, address, or part of their address in the search field and then click the search button. Choose the appropriate homeowner from the popup box and their information will automatically populate the appropriate fields

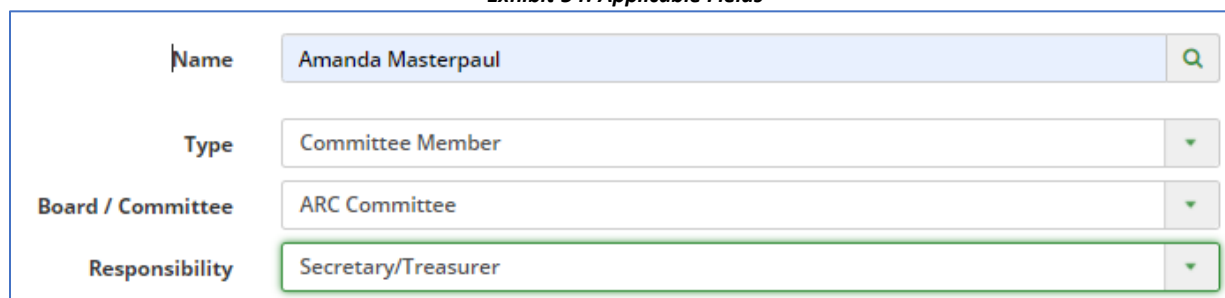
Exhibit 53: Name Search



|                 |                                             |   |
|-----------------|---------------------------------------------|---|
| Name            | am                                          | Q |
| Type            | Amanda Masterpaul<br>3055 Breckinridge Blvd | ▼ |
| Board/Committee |                                             | ▼ |
| Responsibility  | Manage addresses...                         | ▼ |

6. From the **Type** dropdown, choose the homeowner's title
7. From the **Board/Committee** dropdown, choose the group to which they are to be assigned.  
*\*NOTE: A homeowner that is on both the board and a committee should be set up separately for each group*
8. From the **Responsibility** dropdown, choose the member's additional responsibility, if any

Exhibit 54: Applicable Fields



|                   |                     |   |
|-------------------|---------------------|---|
| Name              | Amanda Masterpaul   | Q |
| Type              | Committee Member    | ▼ |
| Board / Committee | ARC Committee       | ▼ |
| Responsibility    | Secretary/Treasurer | ▼ |



*These dropdown fields should be set up from the **System/Dropdown Options** screen prior to setting up the members of the board or the committees.*

9. If the member has been set up with a login under **System/Users**, choose their name from the Board Login dropdown list
10. For the remaining fields, enter the appropriate information and click **Save**



*To allow a user mobile access, toggle **Allow Mobile Access** to "on"*

11. To delete a member, check the box next to their name in the grid and click **Delete**

## Addr Tab

This screen stores additional addresses related to the association. When work orders are created for an association, the addresses contained in this screen can be directly linked to the work order. **\*NOTE:** To ensure proper printing of coupons and statements, the remittance address must be entered on this screen.

Exhibit 55: Additional Addresses Screen

Additional Addresses / ABC Condo association

+ New Save Delete Excel Refresh Cancel Quick Message Help Dashboard

| Name                     | Address | Email | Phone |
|--------------------------|---------|-------|-------|
| <input type="checkbox"/> |         |       |       |

Address Type: Remittance Address

Address: 1099 Address, Clubhouse, Comm Element, Community Store, Developer, Golf Course Office, Mailing Address, Maintenance, Physical Address, Pool, Remittance Address, Security Office, Tennis Pro Shop

City, State Zip:

Home Phone:

Work Phone:

Village:

Lot:

Common Area: ☐

Name:

Mobile Phone:

Email:

Phase:

Block:

Info Addr Streets Sections Notes Directory Invoicing Users 1099 Sub Assoc Misc

To set up additional addresses, follow these steps:

1. Access the association from the association setup screen, then click the **Addr** tab
2. If this is the first address to be entered, fill in the blanks. Otherwise, click **New** to display a blank detailed information form
3. From the dropdown, choose the type of address that is being entered



**Association Address Types** are set up in the **Systems/Dropdown Options** section of the system

4. Enter the name, address, city, state, zip, phone numbers, and email that relate to this address
5. Once the information is entered, click **Save**. The address will autofill into the grid located at the top of the screen. To add additional addresses, click **New**
6. To delete an address, check the box next to the appropriate address and click **Delete**. A popup box will require deletion confirmation

## Set Up Common Areas

Follow the steps below to set up common areas:

1. Select **System/Drop Down Options**
2. Select **Association Address Type** from the dropdown
3. Click **New** and enter a name in the presented blank box at the bottom of the screen (e.g., *Clubhouse #2*)

**Exhibit 56: Create New Assoc. Address Type**

**Maintain Drop Down Options**

+ New Save Delete Refresh Cancel

Drop Down List Association Address Type

4. Click **Save**
5. Repeat steps 3-4 for each additional common area
6. Select **Setup/Association Setup**
7. Using the parameters, click the correct association name to enter the setup
8. Click the **Addr** tab
9. Click **New**
10. From the **Address Type** dropdown, choose the common area to be set up
11. Fill in the fields and click **Save**
12. Repeat steps 9-11 for each common area These common areas will now be available when creating work orders

## Violation Correspondence Options

CINC provides options for emailing violation letters to homeowners. Follow the instructions below to take advantage of this feature.

### Manage Email Template

The PDF of the violation letter will be attached to the email sent to the homeowner. This will require that a *Violation Letter Email* template be set up prior to emailing violations. Follow these steps to do so:

1. Select **Tools/Email Templates**
2. For **Email Template**, select *Violation Letter Email*

**Exhibit 57: Edit Email Template Screen**

**Edit Email Template**

Save Refresh Cancel Help Dashboard

Email Template: Violation Letter Email

Subject Tags: (Select Tag) Insert

Subject: [^Association Name^] Information

Body Tags: (Select Tag) Insert

Body Text: Dear [^Homeowner Name^],  
Please see the attached letter concerning your property in [^Association Name^]. If you have any questions please contact us at [^Association Email^].  
Sincerely,  
[^Association Manager^]  
[^Association Name^]

3. For the **Subject** line of the email, CINC recommends including the association name by inserting the *Association Name* tag
4. Enter the text of the email in the body. Use tags like *Homeowner Name* and *Association Name* to customize the message
5. Complete the HTML portion of the screen and click **Save**

**Exhibit 58: Edit Email Template Screen—HTML Section**

The screenshot shows the 'HTML Body' editor interface. At the top, there is a toolbar with various icons for text formatting and insertion. Below the toolbar, the text area contains the following content:

Dear [^Homeowner Name^],

Please see the attached letter concerning your property in [^Association Name^]. If you have any questions please contact us at [^Association Email^].

Sincerely,

[^Association Manager^]  
[^Association Name^]

At the bottom of the editor, there are three tabs: 'Design', 'HTML' (which is currently selected), and 'Preview'.

**Exhibit 59** is an example of a completed email template.

**Exhibit 59: Email Template**

The screenshot shows the 'Edit Email Template' screen. At the top, there are buttons for 'Save', 'Refresh', and 'Cancel'. On the right, there are links for 'Help' and 'Dashboard'. The 'Email Template' dropdown menu is set to 'Violation Letter Email'. The 'Subject Tags' dropdown is set to '(Select Tag)' with an 'Insert' button. The 'Subject' field contains '[^Association Name^] Information'. The 'Body Tags' dropdown is set to '(Select Tag)' with an 'Insert' button. The 'Body Text' field contains the following content:

Dear [^Homeowner Name^],

Please see the attached letter concerning your property in [^Association Name^]. If you have any questions please contact us at [^Association Email^].

Sincerely,

[^Association Manager^]  
[^Association Name^]

## Set Email Security Permission

To email violations, a new permission is required. Follow these steps to do so:

1. Select **System/Security Permissions**
2. For **Security Group**, select the security group to whom permission is to be granted
3. Scroll down to the **Homeowners** section and make sure the correct permissions are selected for *Email Correspondence*

**Exhibit 60: Security Permissions Screen**

| Homeowners               | <input type="checkbox"/> Add        | <input type="checkbox"/> Update     | <input type="checkbox"/> Delete     | <input type="checkbox"/> View       |
|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Batch Posting            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Change Batch Closed Date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Delete Closed Batch      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Email Correspondence     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Email eStatements        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

## Select Paper Source

The *Paper Source* screen has been updated to provide the new email options:

1. Select **System/Dropdown Options**
2. From **Dropdown List**, select *Paper Source*
3. Select an option:
  - *None*: The system will continue to generate violation jobs and create a PDF for printing
  - *Email OR Letter*: If there is an email tied to the mailing address for which the violation is being created, the system will use that email as well as email addresses tied to the property from WebAxis. If there is no email address, it will generate a letter in the queue that the management company can print
  - *Email AND Letter*: If there is an email address tied to the mailing address record for which the violation is being created, the system will use that email and any other email addresses tied to the property from WebAxis. The system will also generate a letter to print for each address record that was selected as part of the violation setup

**Exhibit 61: Paper Source Dropdown Options**

**Maintain Drop Down Options**

Drop Down List **Paper Source**

| Description                                          | Letterhead               | 1st Page Only            | Email                                                                                                                                |
|------------------------------------------------------|--------------------------|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Certified                   | <input type="checkbox"/> | <input type="checkbox"/> | Email (None)                                                                                                                         |
| <input type="checkbox"/> Email                       | <input type="checkbox"/> | <input type="checkbox"/> | (None)<br>Email or Letter<br>Email and Letter<br>Email or Letter (include WebAxis Email)<br>Email and Letter (include WebAxis Email) |
| <input type="checkbox"/> Email/Letter Correspondence | <input type="checkbox"/> | <input type="checkbox"/> | Email or Letter (incl)                                                                                                               |
| <input type="checkbox"/> Firstclass                  | <input type="checkbox"/> | <input type="checkbox"/> | Email (None)                                                                                                                         |

Update the *Violation Correspondence* templates with the appropriate paper source when paper sources have been added or modified.

**Exhibit 62: Edit Correspondence Template Screen**

**Edit Correspondence Template**

Save Save & New Cancel

Association: ABC Homeowners Association, Inc. Template Name: Friendly 1st Notice

Template Type: Violation Paper Source: Letterhead

Help Dashboard

## Email Violation Letters

Upon posting a Violation job based on the setup above, the system will create the appropriate emails in the new *Email Correspondence* screen.

1. Select **Homeowners/Email Correspondence**
2. Select the appropriate job from the **Email Correspondence Jobs** dropdown. **Status: Unsent** is the screen default

**Exhibit 63: Email Correspondence Screen**

**Email Correspondence**

E-Mail Delete Refresh Cancel

Help Dashboard

Email Correspondence Jobs 4/22/2020 [00000117] 2 Viol Status Unsent

| Account # | Name / Address                           | Email Address           | Status |
|-----------|------------------------------------------|-------------------------|--------|
| CC56      | Juanita Additional Address<br>North Main | juanita@cincsystems.com | Unsent |
| CC56      | Juanita Tenant Address<br>Main North St  | juanita@cincsystems.com | Unsent |

# of Letters: 2

3. Click on the homeowner **Name/Address** to view the PDF that will be attached to the email
4. Select specific letters to email or select all by checking the box next to **Account #**, then click **Email**
5. Delete any letter prior to emailing by checking the box next to them and clicking **Delete**
6. To view *Sent* emails, change the status filter to *Sent*
7. To view *Deleted* emails, change the status filter to *Deleted*