Association Manager Training

Date: 7/19/2021

Table of Contents

Table of Exhibits

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

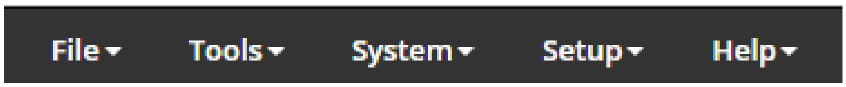
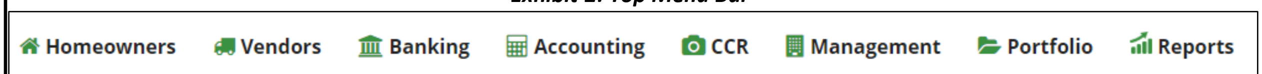


Exhibit 2: Top Menu Bar



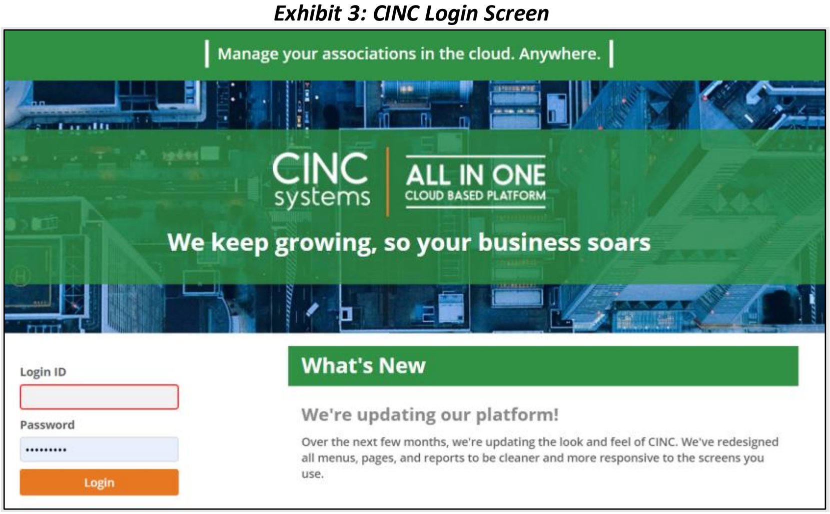
Getting Started

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

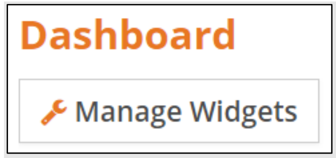
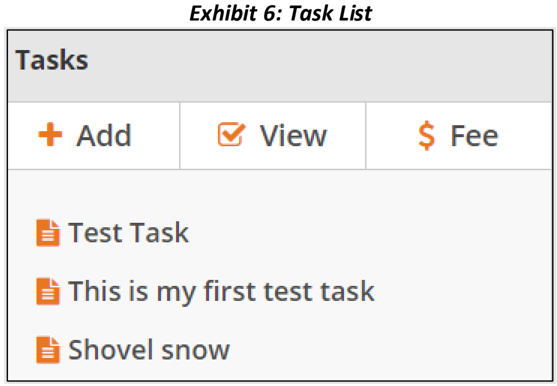


Exhibit 5: List of Available Widgets

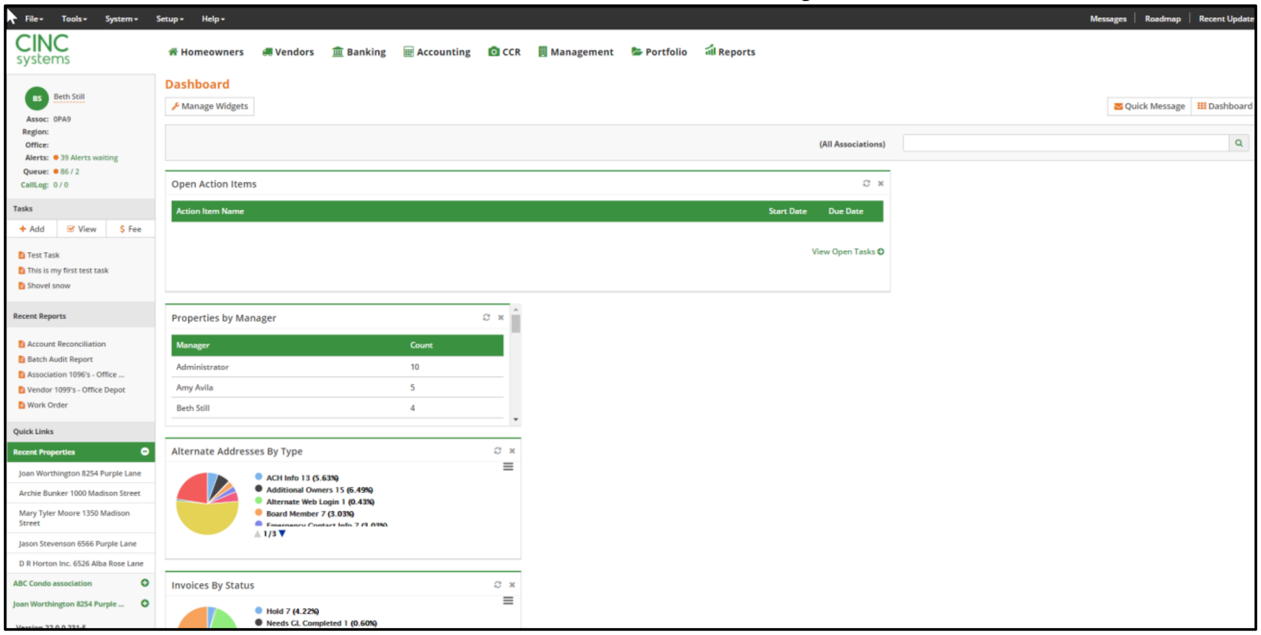
- **Top Black Menu Bar—**Assists in the setup and management of the system
- **Tasks—**List of pending tasks

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



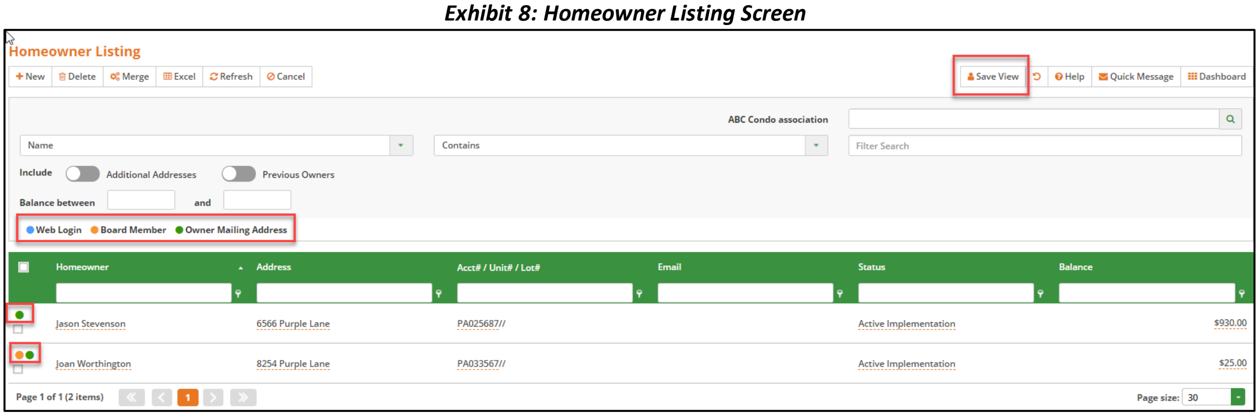
Homeowner Information

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

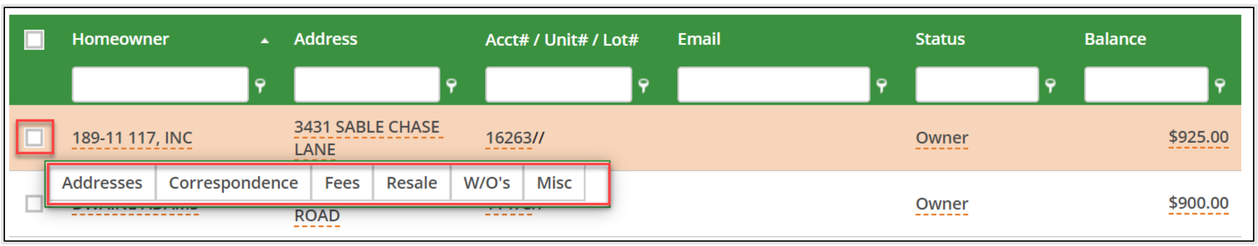


*To search by the same criteria each time on the Homeowner Listing screen, select the desired search criteria and click **Save View**. This will default the screen to that view.*

Hover over the checkbox to the left of the homeowner to view a submenu from which to select Addresses, Correspondence, Fees, Resale, W/Os, *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



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:

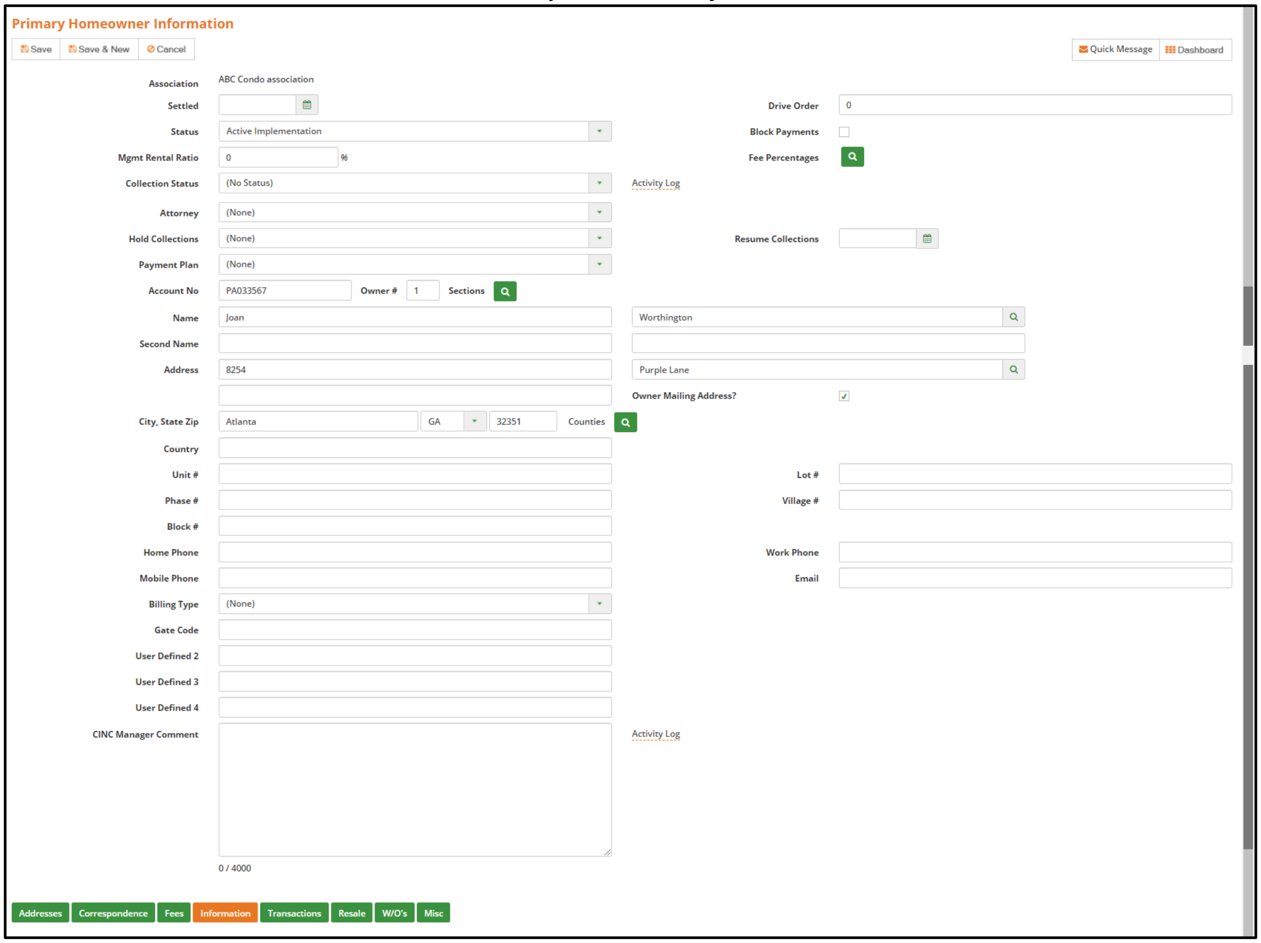
Exhibit 10: Homeowner Information

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 **System**/*Dropdown Options*: **Homeowner Status**
Block Payments	Checkbox	Check if a homeowner is blocked from making payments (AI 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 **Setup**/*Collections Setup*: **New**
Activity Log	Hyperlink	Displays homeowner collections activities chronologically
Attorney	Dropdown	Set up in **Vendors**/*Vendor Information.* 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 **Resume Collections** date is set, the system removes the hold and reevaluates account. Can override from here. Set up under **System**/*Dropdown Options*: **Collection Hold Reason**
Resume Collections	Date	Date to resume collections that have been on hold
Payment Plan	Dropdown	*None, Active or in Default of payment plan.* Affects the order in which payments are applied. Set up under **System**/*Assessments*. 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: *Single family, townhome, condo, 1 BR, 2 BR, homes with boat slips,* 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 Data Standards 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 **Addresses** at the bottom of the screen
City	Fillable field	

Field Name	Type	Field Description (Blue fields are required)
State	Dropdown	Set up under **System**/*Dropdown Options*: **Address States**
Zip	Fillable field	
Counties	Search button	Dropdown; Set up under **System**/*Dropdown Options*: **County**
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	*Automatic ACH; Coupons; eStatements; Statements*. Must always be set on the same screen where *Owner Mailing Address* 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	*Checking* or *Savings*
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

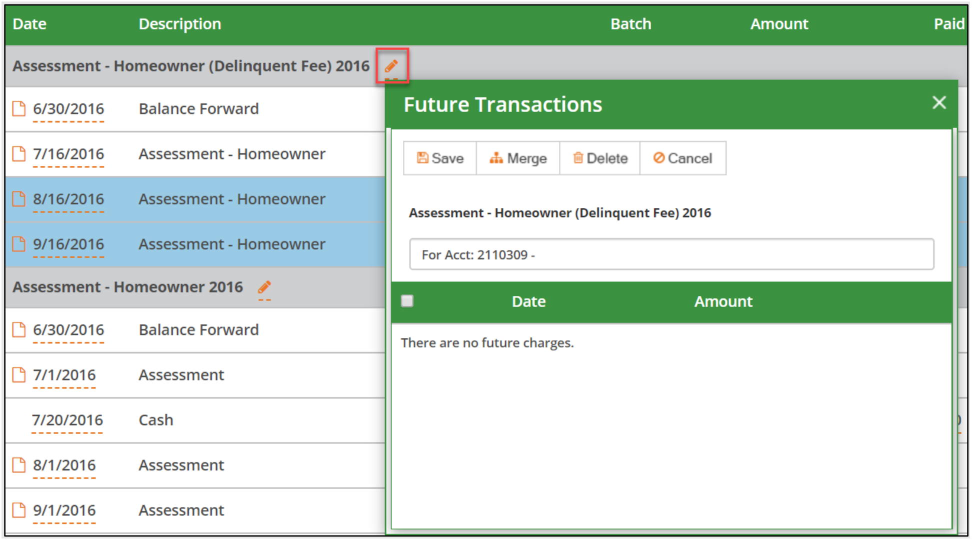
Exhibit 11: Primary Homeowner Information Screen



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

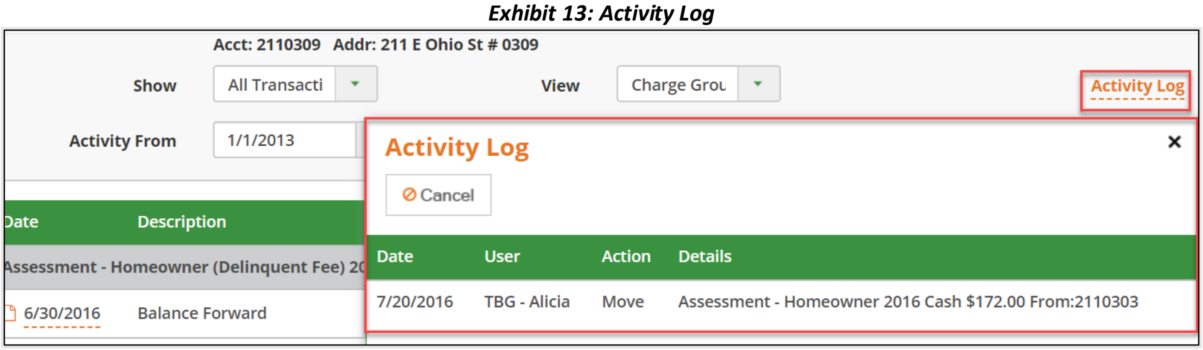
- **Property Status**—Displays the status of the property as selected on the *Homeowner Information* screen
- **Collection Status (if applicable)**—Will display next to the homeowner's name in red
- **Account Number**—Click the link to toggle between current and previous homeowner accounts
- Transactions
- **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



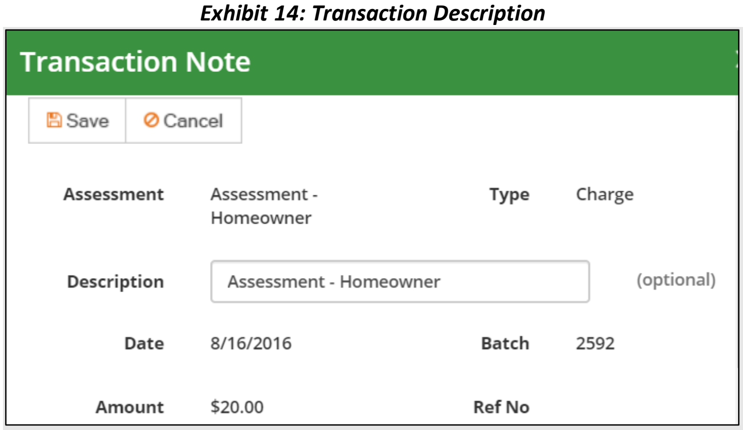
- **Activity Log**—Displays a list of account activities and users responsible for the actions

Exhibit 13: Activity Log



- **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



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

Exhibit 15: Batch Details

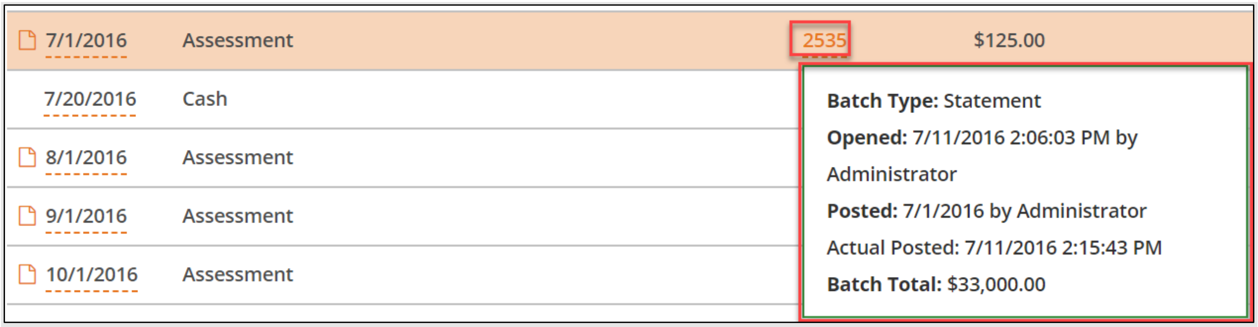
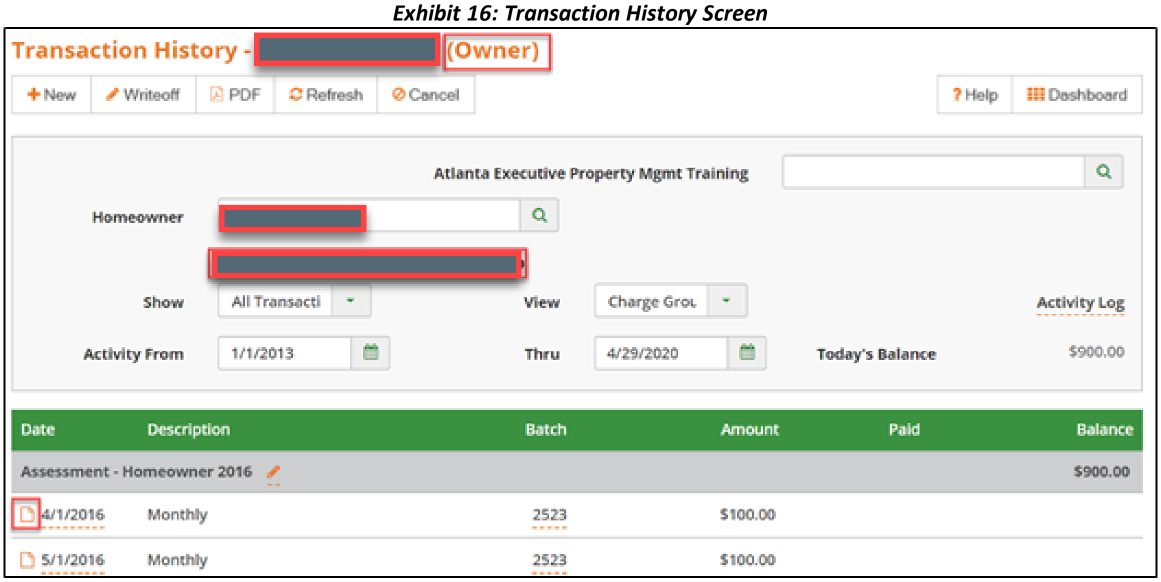


Exhibit 16: Transaction History Screen



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

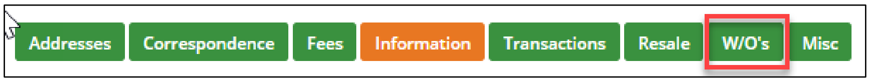
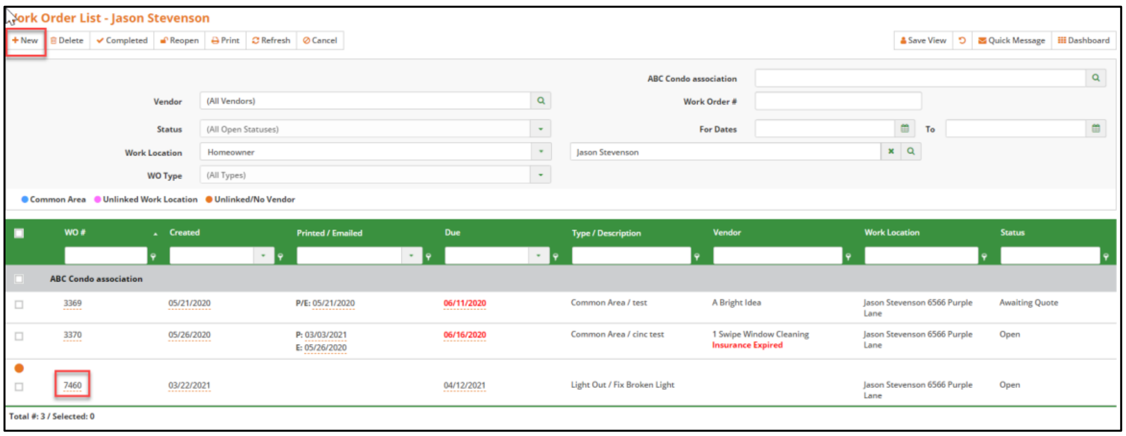
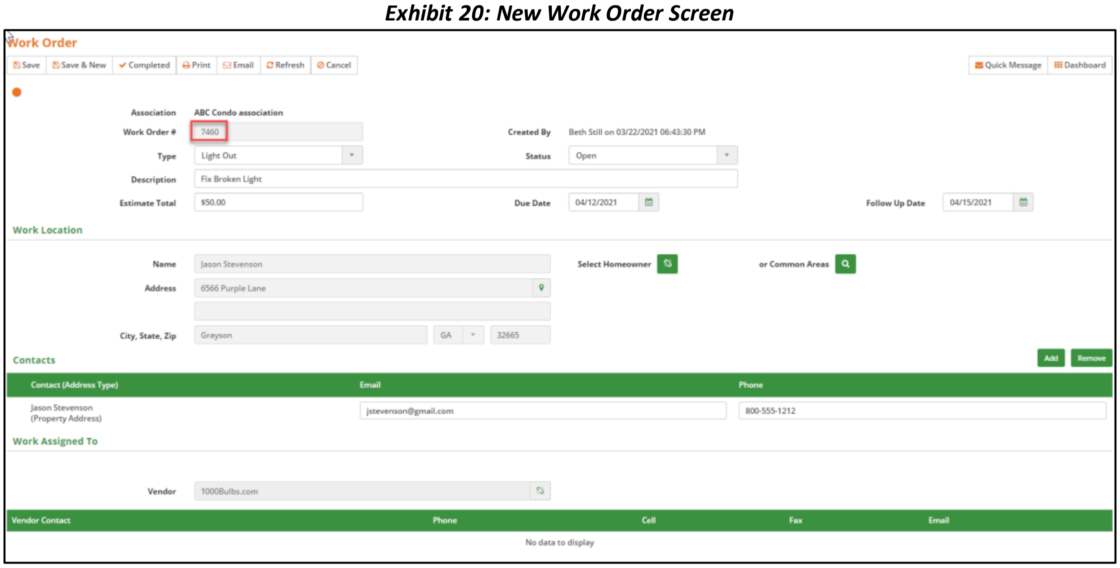


Exhibit 19: Work Order List Screen



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

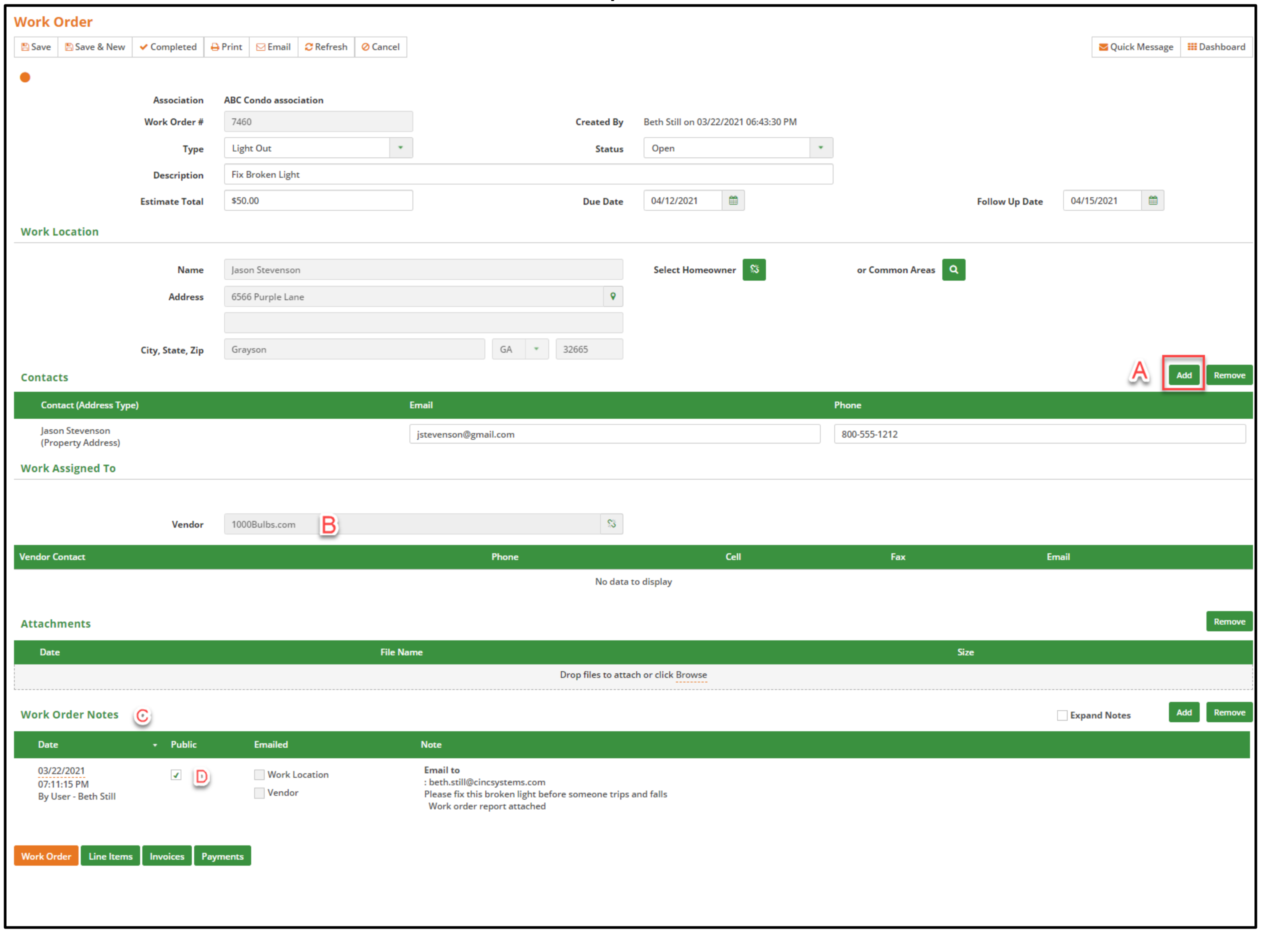
Exhibit 20: New Work Order Screen



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*

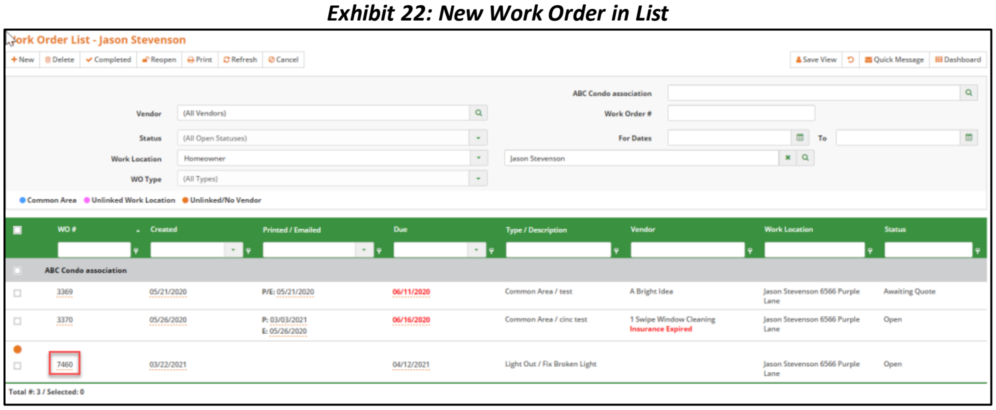
- **Work Order Notes (C)**
  - *Date*
  - *Public (checkbox). If checked, this work order will display on the web site **(D)***
  - *Email (Work Location or Vendor)*
  - *Note*

Exhibit 21: Completed Work Order



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

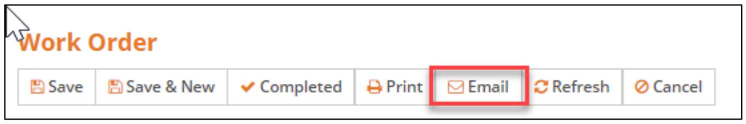
Exhibit 22: New Work Order in List



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

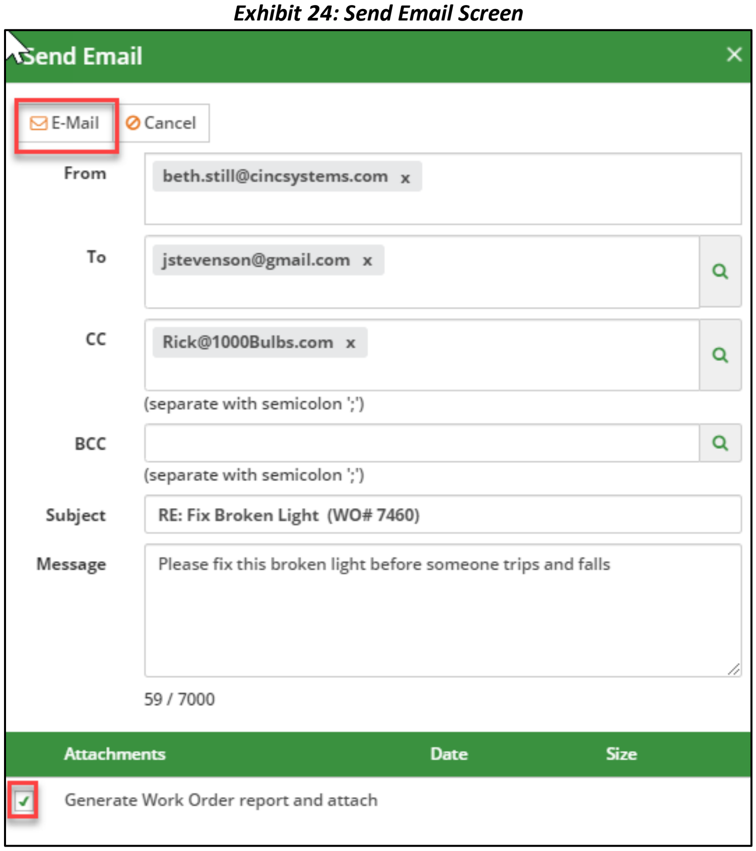


Exhibit 25: Work Order Report

Work Order
ABC Condo association
 # 7460

Date: 3/22/2021
Time: 7:12 pm
Page: 1

Issue Date: 03/22/2021
Due Date: 04/12/2021
Quote/Estimate: $50.00

Management Company: CINC Training Environment
Property Manager:
Phone: (678) 205-1465 **Fax:** (678) 205-1469
Email:

Location: 6566 Purple Lane
Grayson, GA 32665

Description: Fix Broken Light

Work Location Contacts

Name (Address Type)	Email	Phones
Jason Stevenson (Property Address)		W:

Work Assigned To: 1000Bulbs.com

Vendor Contacts

Name	Phone	Cell	Fax	eMail

Notes & Instructions

3/22/2021 Email to : beth.still@cincsystems.com Reason :Please fix this broken light before someone trips and falls
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.*

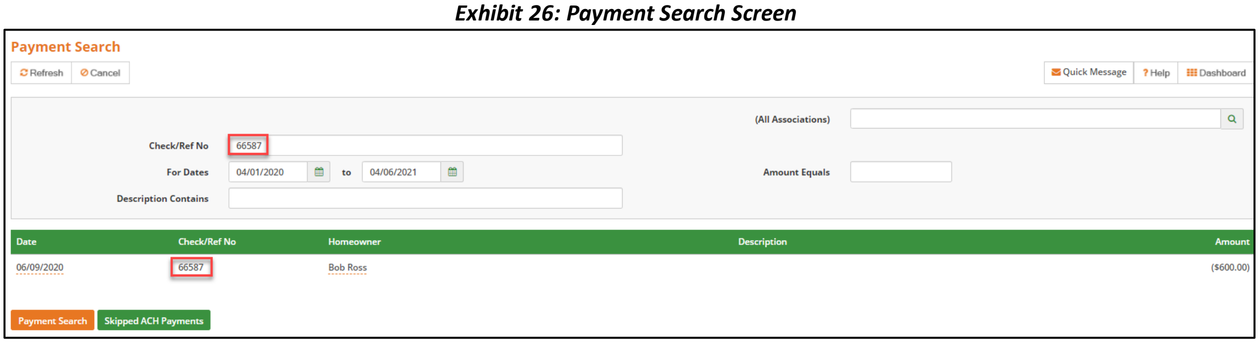
Payment Search

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

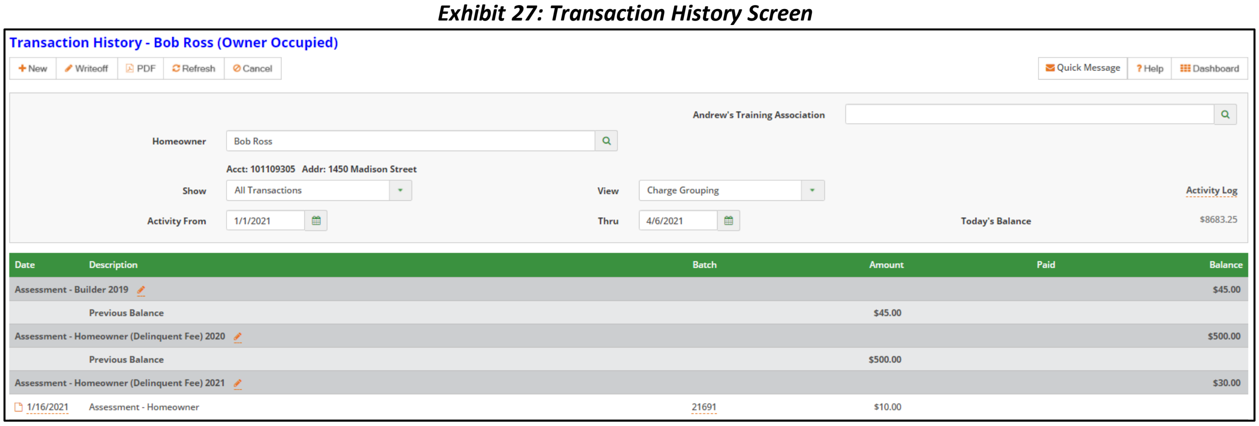
   Transactions matching the search criteria will display on the screen.

Exhibit 26: Payment Search Screen



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

Exhibit 27: Transaction History Screen



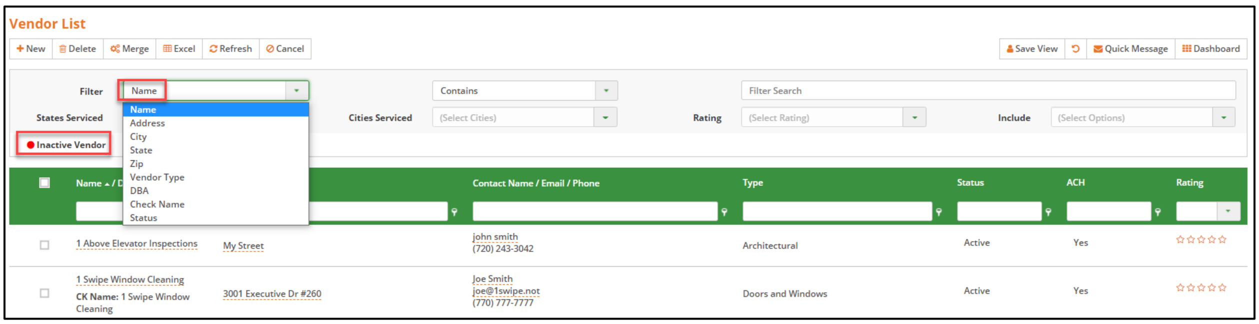
Vendor Information

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

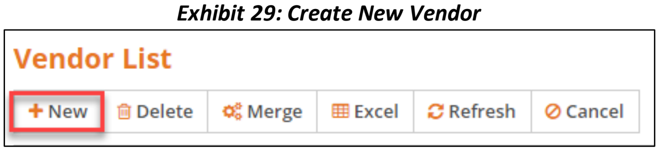


Vendor Review

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

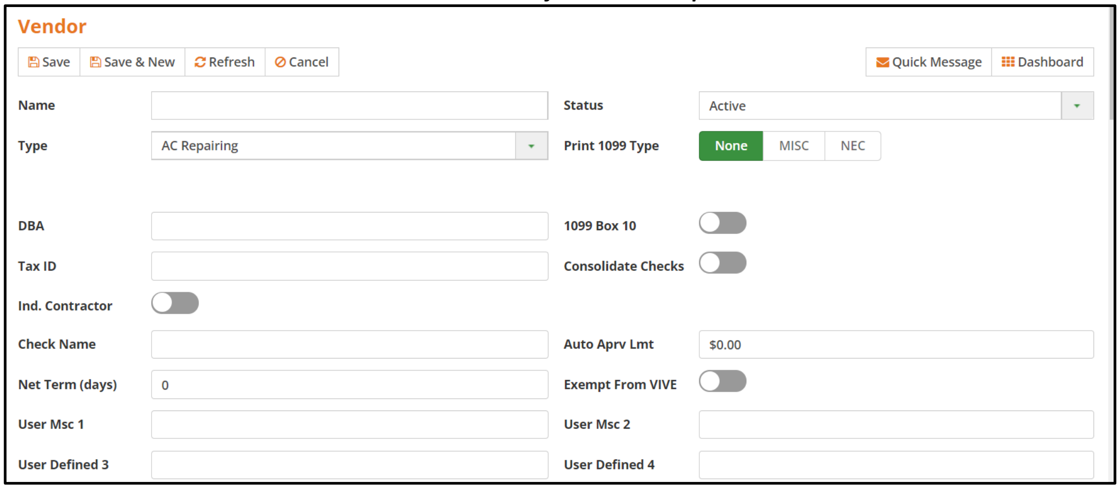
1. Select Vendors/Ven*dors* and click **New**

Exhibit 29: Create New Vendor



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

Exhibit 30: Vendor Information—Top Section

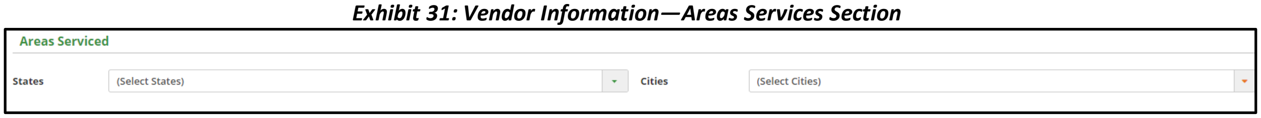


Field Name	Type	Field Description (Blue fields are required)
Name	Fillable field	Vendor Name
Rating	Toggle	Not applicable
Status	Dropdown	These are set up under System/Dropdown Options
Type	Dropdown	Mgmt Co
Print 1099	Toggle	None/MISC/NEC
DBA (Doing Business As)	Fillable field	Enter if vendor is known 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 **Print 1099** 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. ****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*
Ind. Contractor	Toggle	If the **Ind. Contractor** toggle is switched on and an EIN format is entered in the Tax ID field (xx-xxxxxxx), then a **Social Security Number** field will appear on the *Vendor Information* screen. Conversely, if the **Ind. Contractor** toggle is off, the **SSN** 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 **System**/*User Defined Fields* 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 **System**/*User Defined Fields* 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 **System**/*User Defined Fields* 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 **System**/*User Defined Fields* by users with necessary permissions

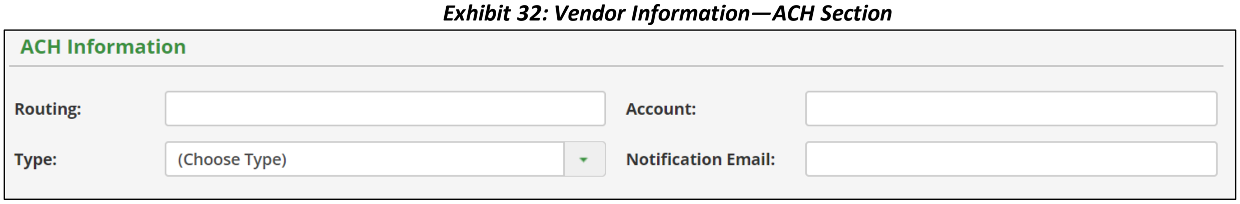
The next section is **Areas Serviced**. Select **State**(s) and **City**(s) that the vendor services.

Exhibit 31: Vendor Information—Areas Services Section



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.*

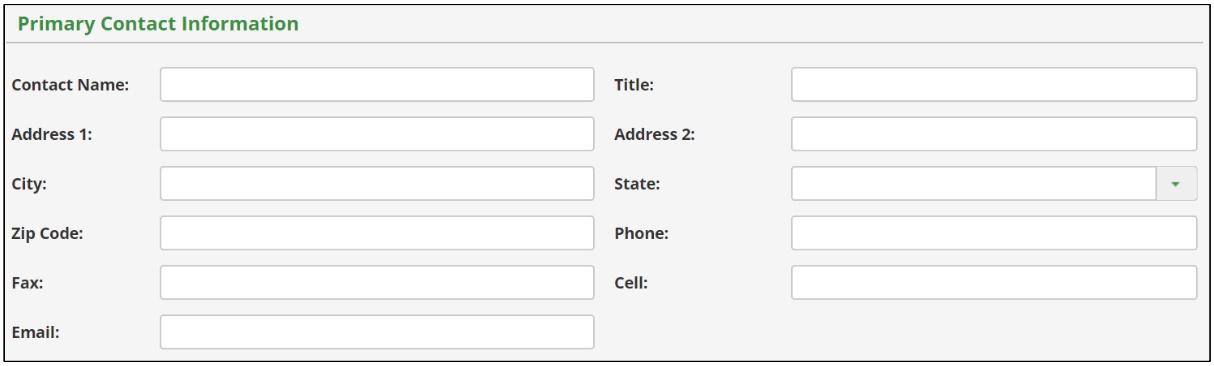
Exhibit 32: Vendor Information—ACH Section



ACH INFORMATION		
Routing	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.*

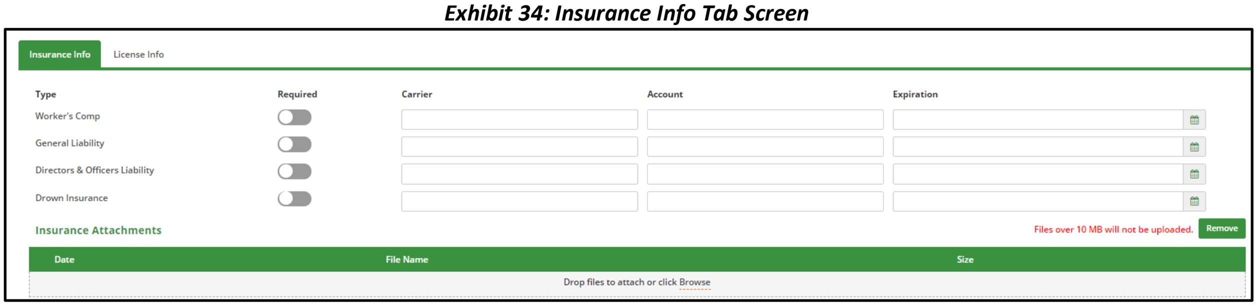
Exhibit 33: Vendor Information—Primary Contact Section



PRIMARY CONTACT INFORMATION		
Contact Name	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.

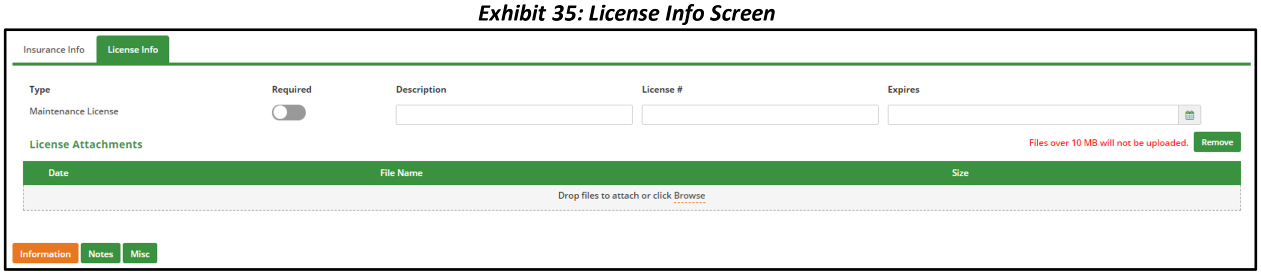
Exhibit 34: Insurance Info Tab Screen



INSURANCE INFO		
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. ****NOTE**: An alert may be turned to notify CINC users of an upcoming insurance expiration and/or an email notification may be set up on **System**/Company Profile settings 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 ****NOTE**: An email notification may be set up on **System**/*Company Profile *settings tab under **Settings**/Vendor Module – License 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*

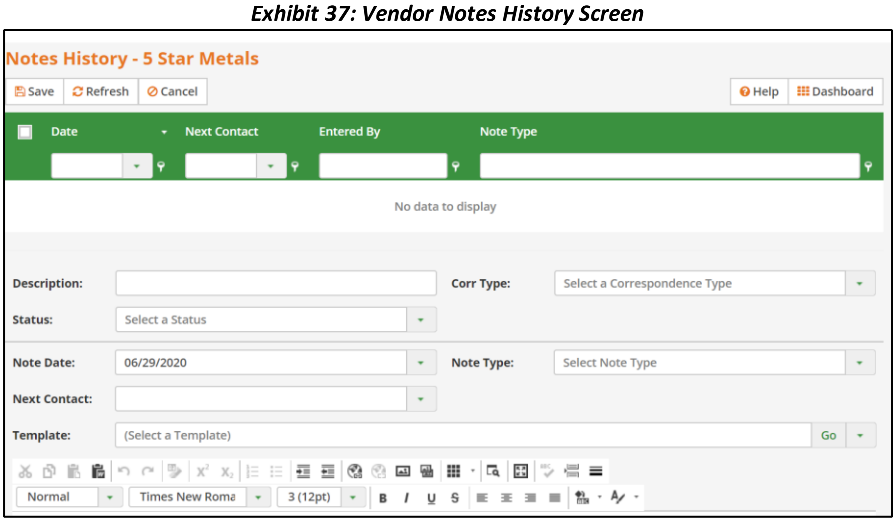
- **Payment Method:** Preferred payment methods (ACH or check) per association may be selected for the vendor. ***NOTE***: *This tab is only available for vendors for which ACH information has been entered*
- **Notes:** Vendor correspondence information may be saved on the **Notes** tab (see *Adding 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



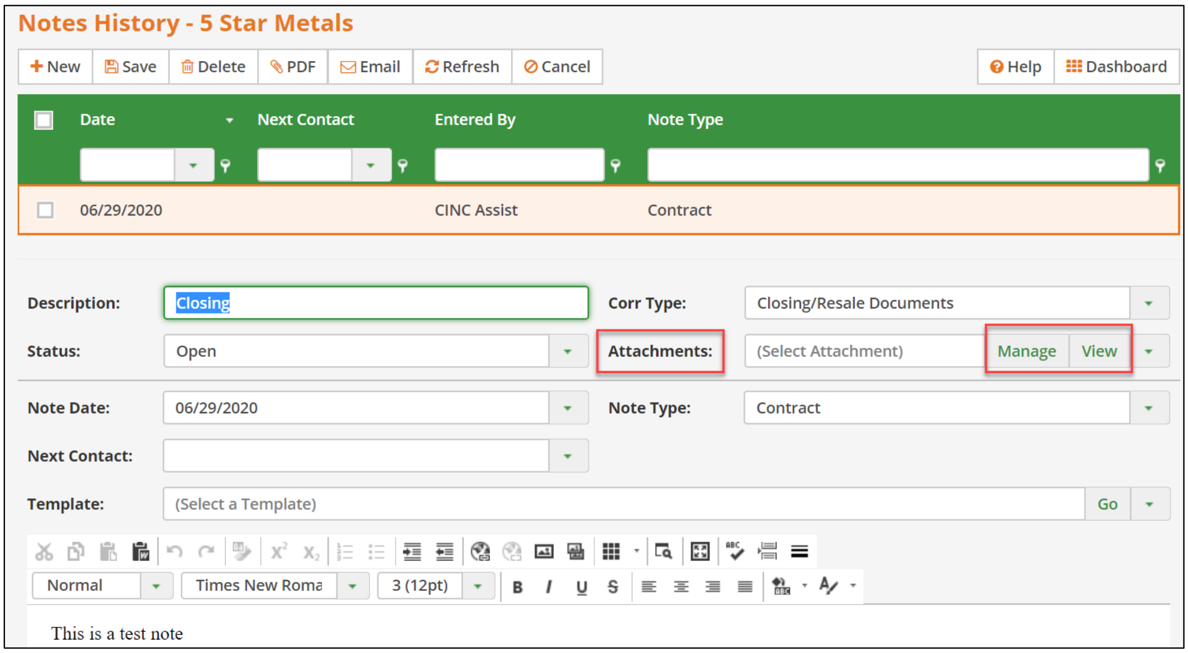
3. Enter the following information, and click **Save:**

   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



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

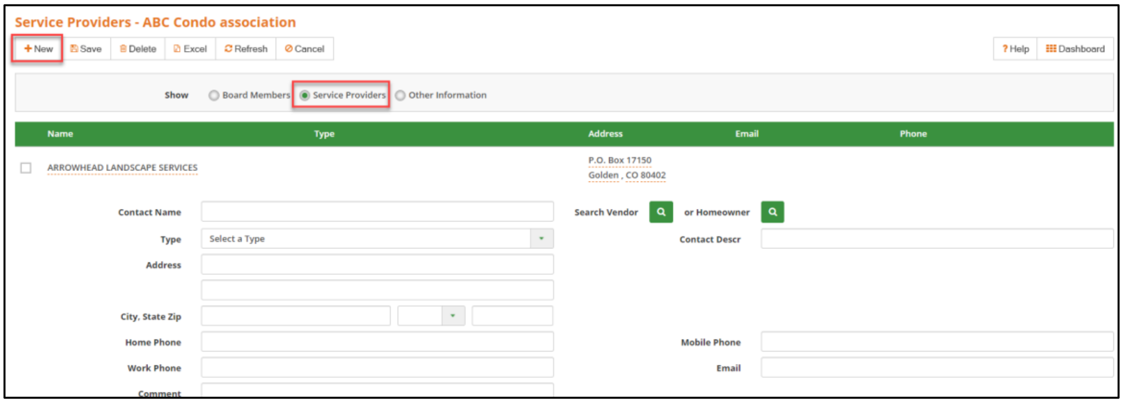
To set up a vendor as a service provider for a specific association (i.e. preferred vendor list), follow these steps:

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

Exhibit 39: Directory Tab

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

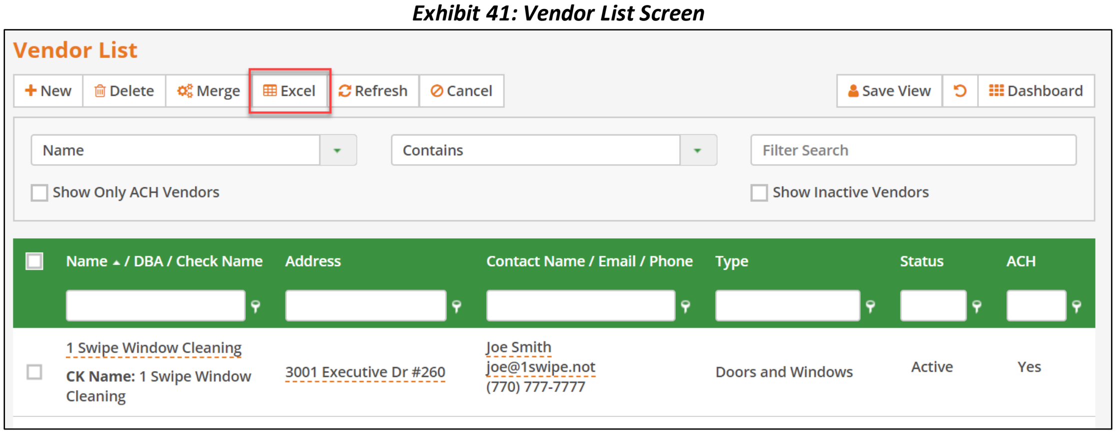
Exhibit 40: Create New Service Provider



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 Invoices

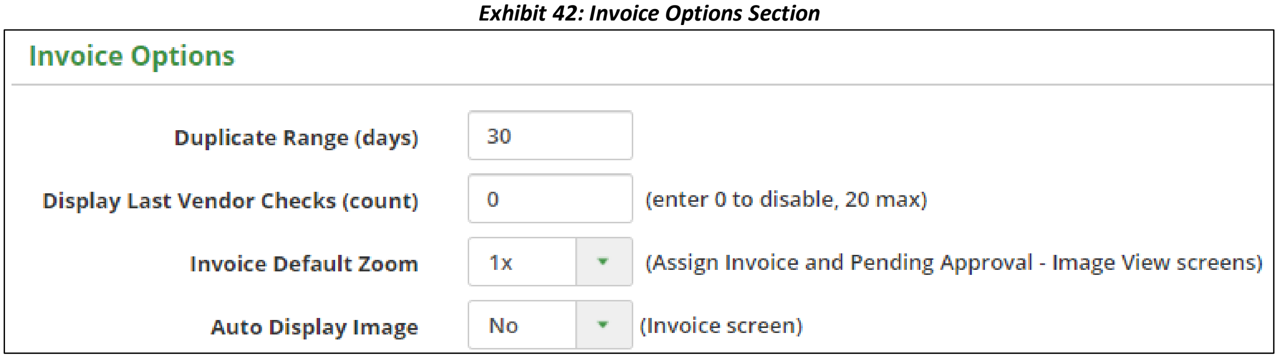
User Preferences

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**:

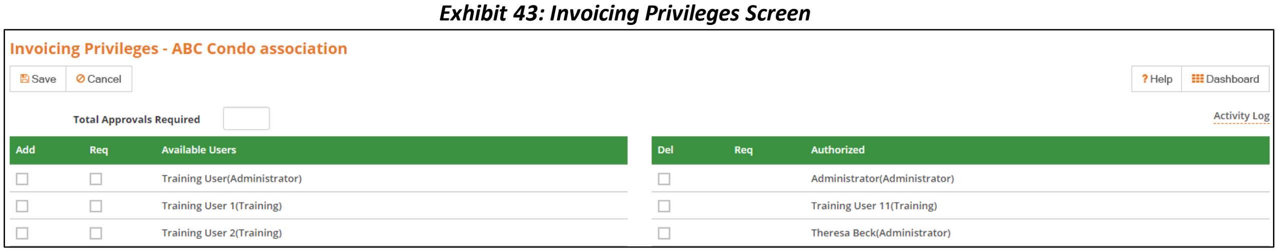
- **Duplicate Range**—Number of days for which an invoice cannot be duplicated. If an invoice has the same date, number, and amount within this timeframe, the user will be alerted. The system default is 30 days
- **Display Last Vendor Checks**—Number of previous checks displayed at a time per vendor. 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



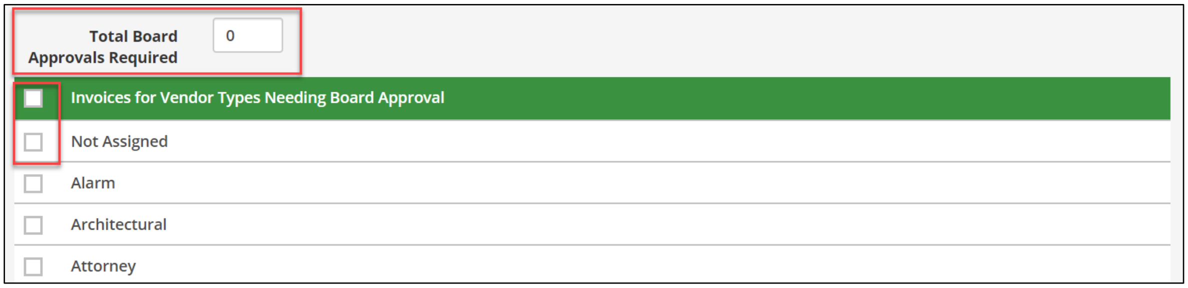
2. Set up approval requirements: Select **Setup**/*Association Setup*, then search for and select the desired association. Click on the *Invoicing* tab at the bottom of the screen to display the *Invoicing Privileges* screen. ***NOTE**: Can also be set up via* User Profile *in the wizard*

Exhibit 43: Invoicing Privileges Screen



3. 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*
4. 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*

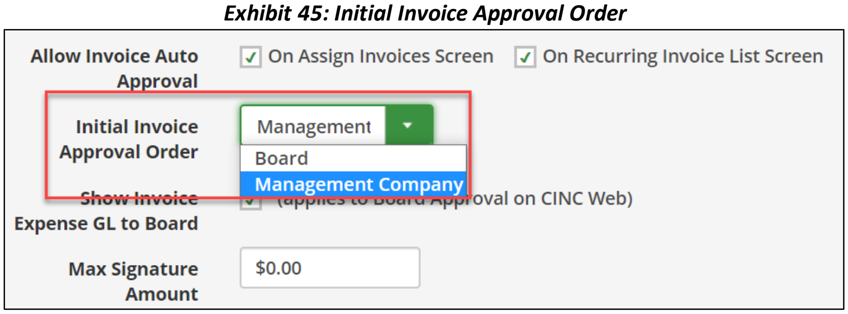
Exhibit 44: Board Approvals Required



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



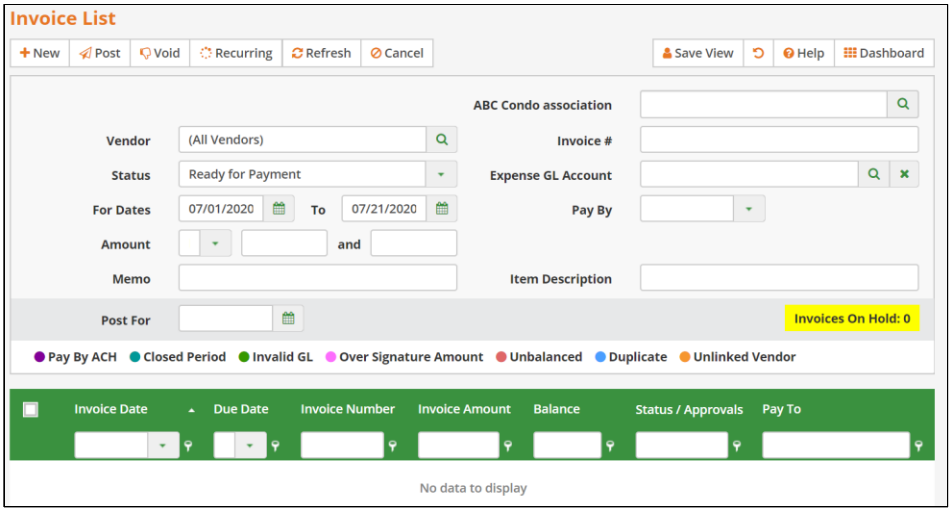
Vendor Invoices Overview

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

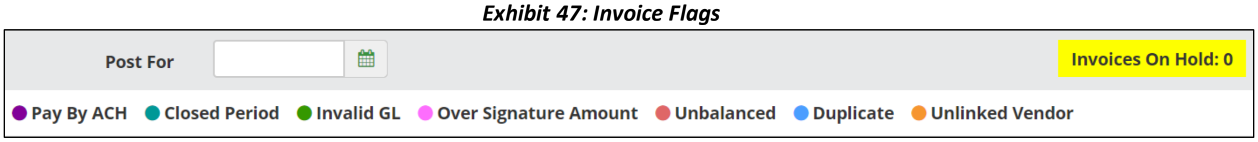


Invoices are also searchable using the Quick Search Grid Filters (green bar):

- **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

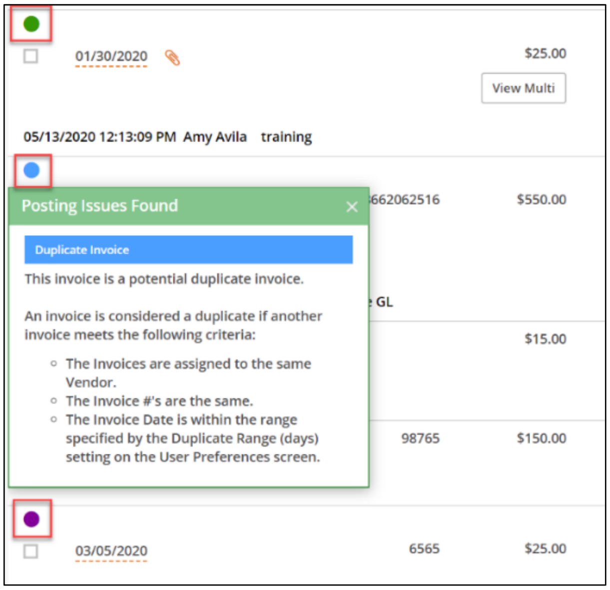


- **Pay by ACH**—Indicates that the invoice was paid by ACH
- **Closed Period**—Displays when an attempt is made to post an invoice in a closed fiscal period
- **Invalid GL**—Displays when an invalid GL account is selected or the GL account is missing
- **Over Signature Amount**—Displays when the amount 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



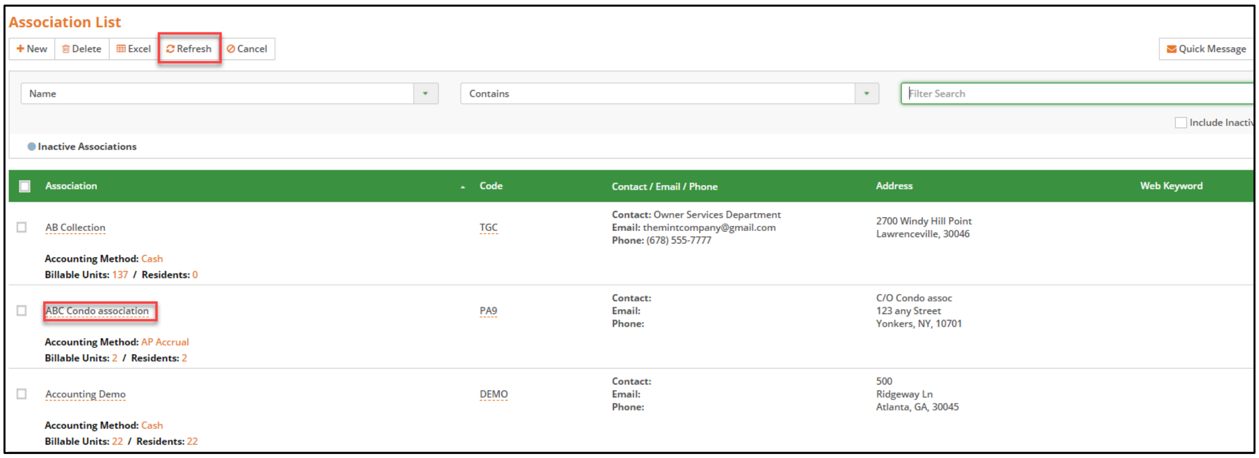
Association Directory

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



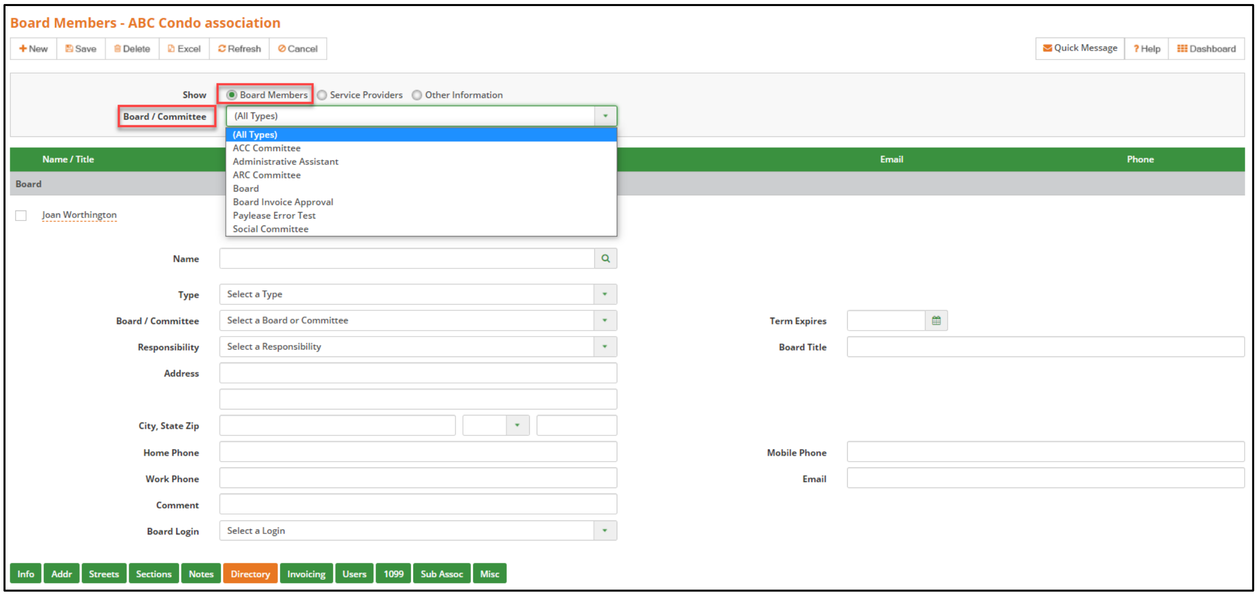
Directory Tab

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

Exhibit 50: Go to Directory Screen

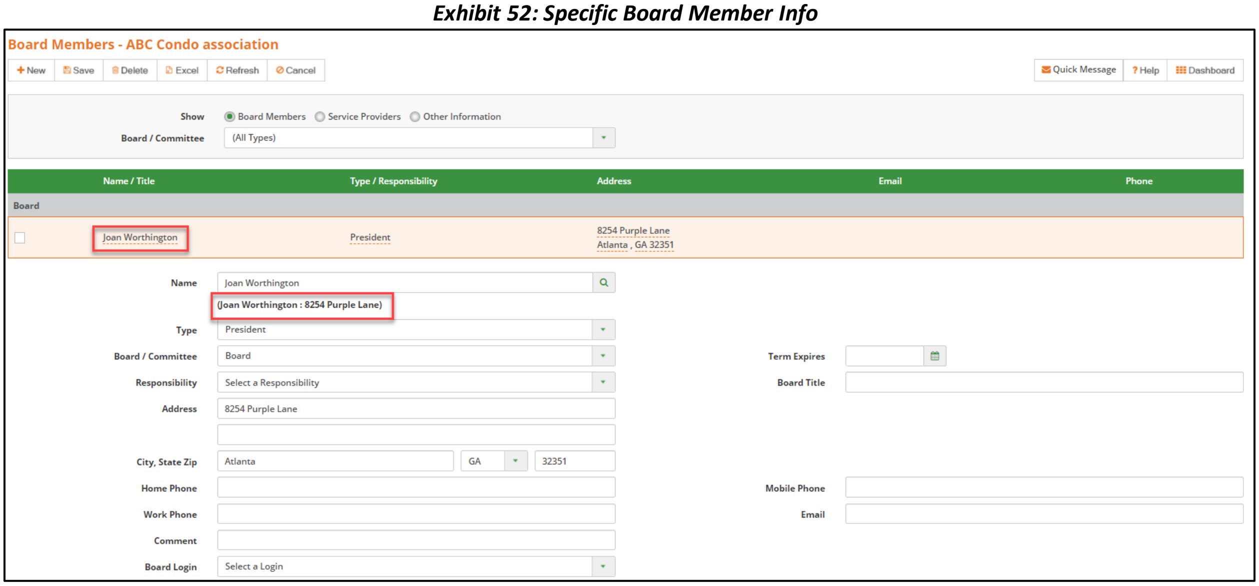
2. For the **Show** option, select *Board Members*. This screen displays board members as well as committee members for an association
3. The **Board/Committee** dropdown allows the user to choose to view all member types, board members only or members of specific committees. The committee names should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

Exhibit 51: Board Members Screen



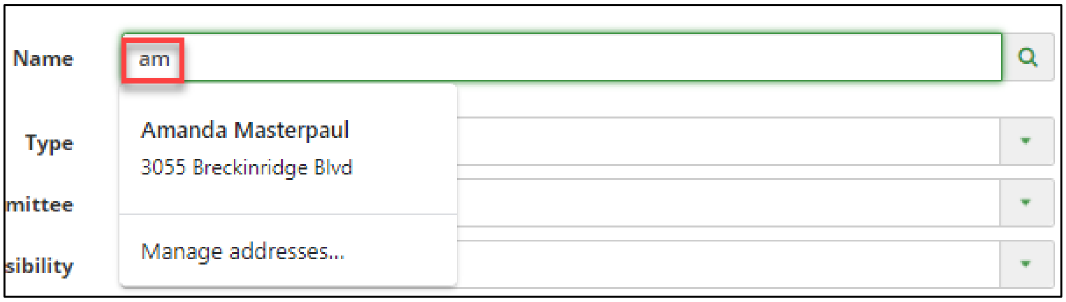
4. To view existing member information, click on the member's name, title, address, or phone number from the grid. Their information will auto-populate in the bottom portion of the screen. To save this information, click **Save**

Exhibit 52: Specific Board Member Info



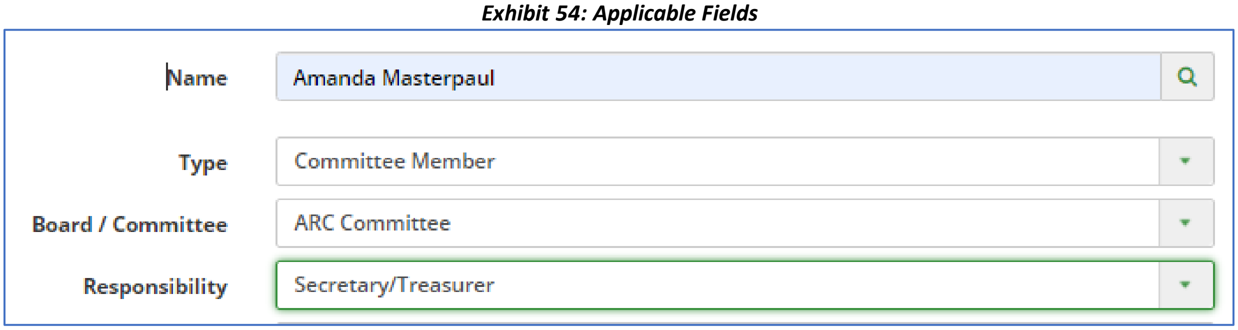
5. To add a new member to the board or to a committee, click **New**. Enter the name, part of the name, account number, address, or part of their address in the search field and then click the search button. Choose the appropriate homeowner from the popup box and their information will automatically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

Exhibit 53: Name Search



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



*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**

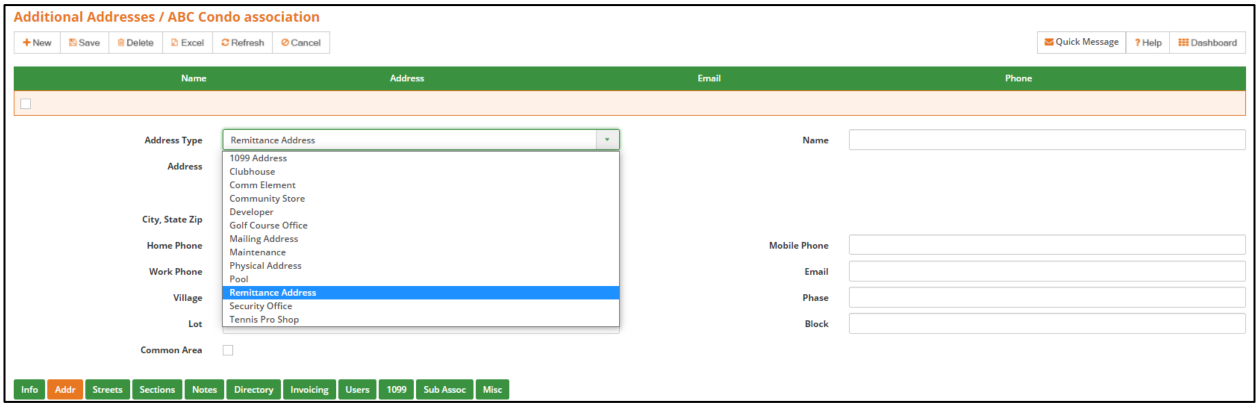
To allow a user mobile access, toggle **Allow Mobile Access** *to "on"*

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



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*

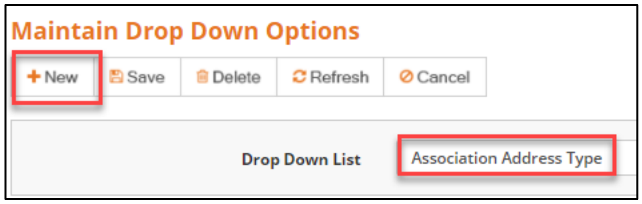
4. Enter the name, address, city, state, zip, phone numbers, and email that relate to this address
5. Once the information is entered, click **Save**. The address will autofill into the grid located at the top of the screen. To add additional addresses, click **New**
6. To delete an address, check the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



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

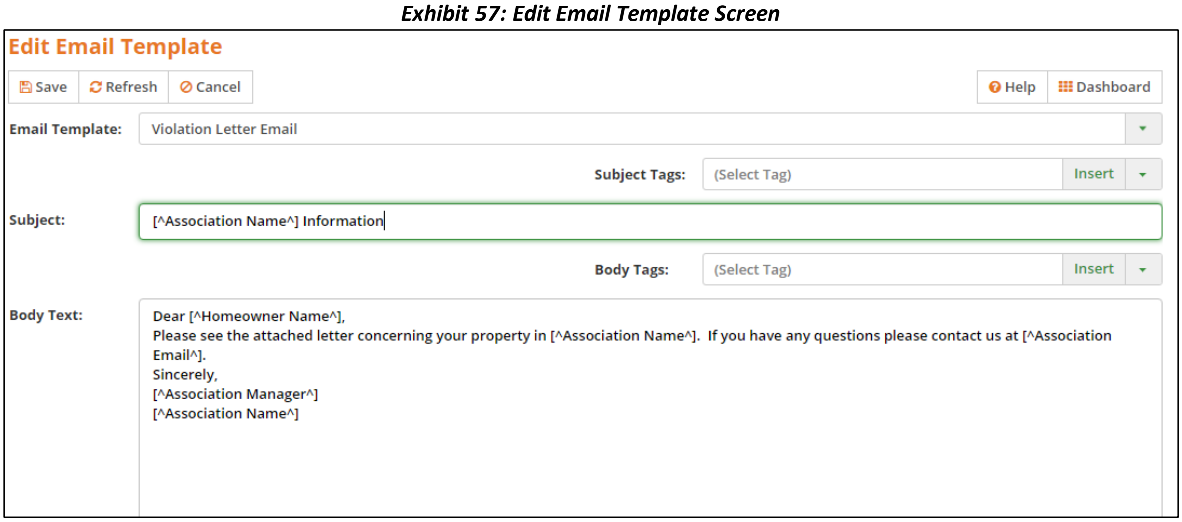
CINC provides options for emailing violation letters to homeowners. Follow the instructions below to take advantage of this feature.

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



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

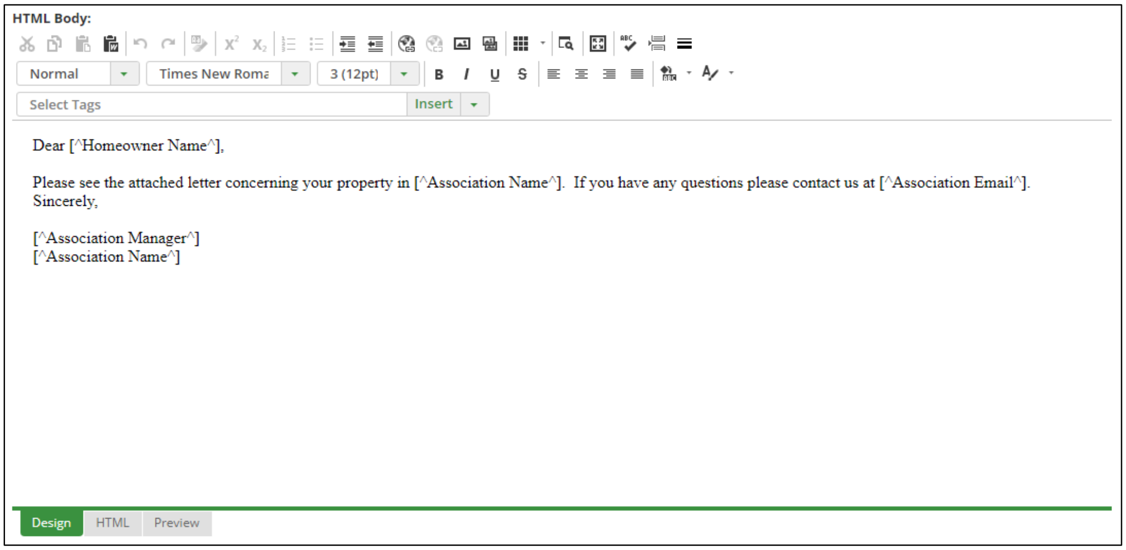
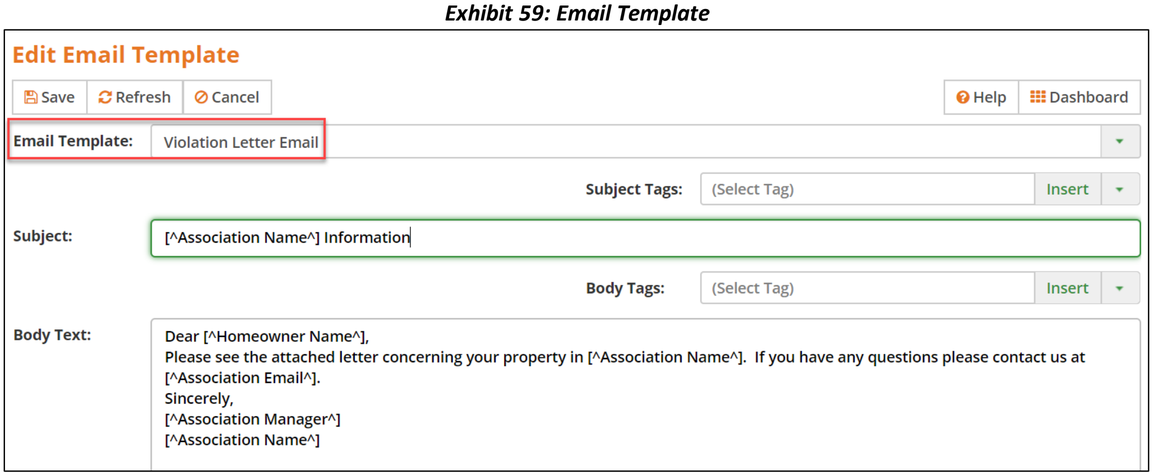


Exhibit 59 is an example of a completed email template.

Exhibit 59: Email Template



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

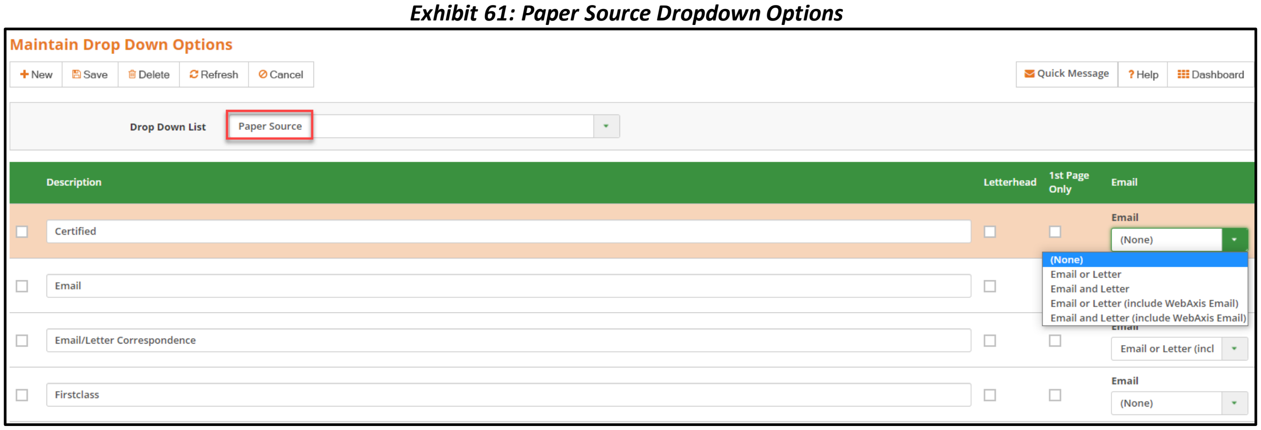
Homeowners	☐ Add	☐ Update	☐ Delete	☐ View
Batch Posting	✔	✔	✔	✔
Change Batch Closed Date	✔	✔	✔	✔
Delete Closed Batch	✔	✔	✔	✔
Email Correspondence	✔	✔	✔	✔
Email eStatements	✔	✔	✔	✔

Select Paper Source

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

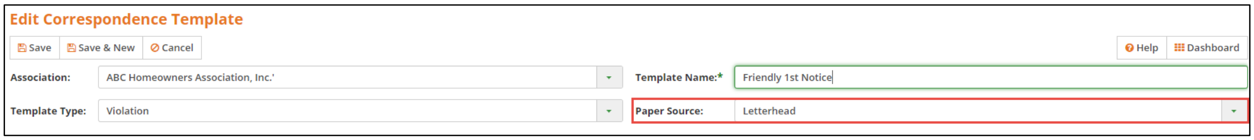
1. Select **System**/*Dropdown Options*
2. From **Dropdown List**, select *Paper Source*
3. Select an option:
   - *None:* The system will continue to generate violation jobs and create a PDF for printing
   - *Email OR Letter*: If there is an email tied to the mailing address for which the violation 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



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

Exhibit 62: Edit Correspondence Template Screen

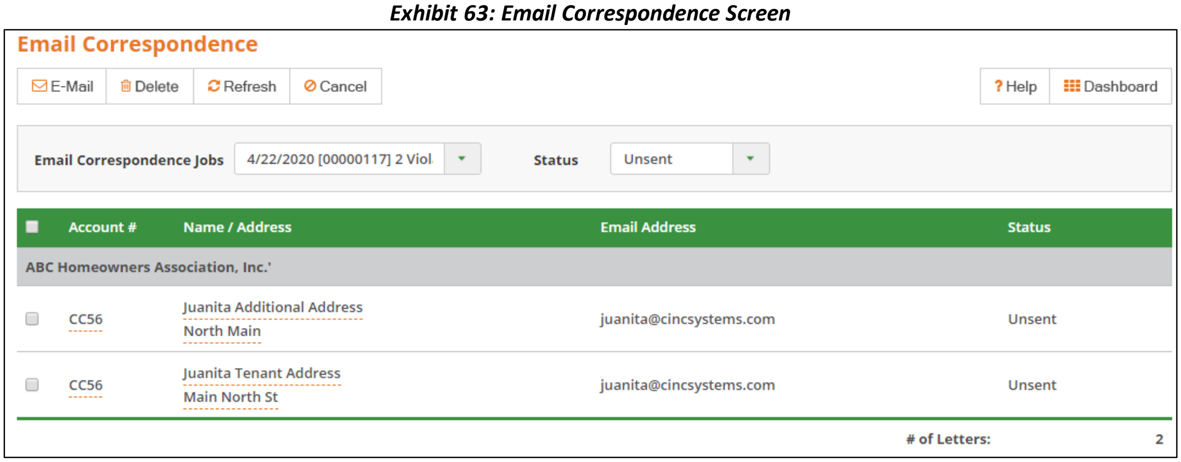


Email Violation Letters

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



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*