

Managing DR Requests (As a Manager via CINC)

Viewing pending requests:

1. Go to CCR, Pending ACC Request.
2. Enter the association in the search bar.
3. You can view requests per owner, or to view all open requests, enter a percent symbol (%) in the Name Contains filter and hit refresh:

Pending ACC Requests

Save

Post

Close

Refresh

Cancel

Dashboard

Name

▼

Contains

▼

Status

Open

▼

☐ Show all ready for auto-approval

*Test Training Association

Q

%

4. To view the full application, click on the owner's name to be redirected to the correspondence record. You can view the request and any attachments by selecting "view", or you can read the request in the body of the note below:

Description:	Landscaping	Corr Type:	ACC Request
Status:	Open	ACC Type:	Landscaping
Attachments:	sample-boundary-survey-land-surveying - Copy.png Manage View		
Note Date:	04/29/2024	Note Type:	Homeowner Contact - Public
Next Contact:			
Template:	(Select a Template)		

Association: *Test Training Association
Date: 04/29/2024 11:25:25 AM
Owner Name: Susan Anderson
Account Number: *TEST1790SHC
Unit:
Address: 1790 Sunhill Court, Duluth, GA 30096
Home Phone:
Cell Phone: 2222222222
Estimated Start Date: 4/29/2024 12:00:00 AM
Estimated Completion Date: 5/31/2024 12:00:00 AM
ACC Type: Landscaping
Please provide a detailed description of the proposed improvement:: Fencing 6ft
Please provide description of materials to be used for proposed improvement:: wood
Who will be doing the work: Homeowner or Contractor?: Homeowner
If Contractor, please provide the Contractor's name, email, and phone number::
Are Permits required? (Yes or No): no
Date Permits Obtained (if applicable)::

5. Review and ensure the request is ready to be sent to the DR committee.
 - a. If the owner is missing pertinent documentation or details, you can request the missing information on this screen, via email, by selecting new at the top to create a new “note”.
 - b. Enter the email message in the body below and select either a private (will not show up on the owner portal) or a public (will show on the owner’s DR in the portal) note type from the drop-down menu.
 - c. Hit save at the top.
 - d. Check off the box next to the email note you just created and then hit email at the top.

Notes History - Susan Anderson (Owner)

New
Save
Delete
PDF
Email
Refresh
Cancel

	Date	Next Contact	Entered By	Note Type
☐	04/29/2024		Annie Caldon	Note - Private
☒	04/29/2024		Annie Caldon	ARC Note - Private
☐	04/29/2024			Homeowner Contact - Public

Description:

Corr Type:

Status:

ACC Type:

Attachments:

Manage
View

Note Date:

Note Type:

Next Contact:

Template:

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

Dear Susan,

Please provide an updated COI for your vendor.

- e. You will then have the opportunity to change or add additional email addresses or include specific attachments before selecting Email to confirm and send.

Send Email
X

E-Mail
Cancel

From

To

Q

(separate with semicolon ';')

CC

Q

(separate with semicolon ';')

BCC

Q

(separate with semicolon ';')

Subject

Attachments	Date	Size
☐ sample-boundary-survey-land-surveying - Copy.png	04/29/2024	386 KB
☐ fencing outline.png	04/29/2024	99 KB
☐ fence.jpg	04/29/2024	151 KB
☒ ACC_Request_2024_04_29.pdf	04/29/2024	68 KB

Create a request manually for unregistered users:

- Go to CCR, New ACC Request.
- Enter the association in the search bar to the right.
- Type in the homeowner's name or address in the search bar on the left and click on the search button to select the owner.
- Fill in the request criteria and attach the application and any corresponding documents. Add any notes in the description for the committee or about the request.

New ACC Request

Request Date	10/25/2024	ACC Type	Choose an ACC Type
Attachment	Choose File No file chosen	Next Contact	
Completed Form Received		Sent To ARC	
Modification Description			

5. To send it to the Committee directly from the new request page, enter a form received date and a sent to ARC date as highlighted above before saving.

Sending the request to the Committee: (skip this if DR Committee approval is not necessary)

Once the request is ready to be sent to the committee for approval, make sure the “completed form received” date is set, and follow the steps below:

Check the checkbox next to the request you are sending

ACC Response			
Mgmt Co Recommends	View ARC Discussion Comments 1/9/2023 - This can be approved		
	Cynthia Ortega & Laura Ortega 110 Stull River Way Recreational/Sports Equipment 08/18/2023 Details		
Next Contact			
Completed Form Received			Sent to ARC
Create a	Letter or Note Recommendation		
Status	Open Template		
ACC Response			
	View ARC Discussion Comments		
	Gabriel Peters 116 Stull River Way 03/20/2023 Details		
Next Contact			
Completed Form Received			Sent to ARC

6 Click "Note"

[View ARC Discussion Comments](#)

Mgmt Co Recommends 1/9/2023 - This can be approved

Cynthia Ortega & Laura Ortega
110 Stull River Way
Recreational/Sports Equipment 08/18/2023 [Details](#)

Next Contact

Completed Form Received

☒ Create a ☒ Letter or ☒ **Note** ☐ Recommendation

Status Open

ACC Response

[View ARC Discussion Comments](#)

Gabriel Peters
116 Stull River Way
03/20/2023 [Details](#)

7 Set the "Sent to ARC" date as Today

[Sent 08/18/2023 Details](#)

Sent to ARC

Recommendation

Template

[Details](#)

Sent to ARC

Recommendation

Template (Select a Template)

August 2023

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Today Close

8 Type in a New Job Name
It can be anything but you must have one

Quick Message

Dashboard

Stull River Homeowner's Association

Q

Contains

%

Show all ready for auto-approval

New Job:

ACC Request

Il Erikson
786
Details

Sent to ARC

5/2/2023

- ### Denying or approving a request:

- /2023

Lilly Aldrin & Marshall Erikson
105 Stull River Way # 786
Driveway 07/19/2023 Details

Contact

Received

Sent to ARC

7/20/2023

Create a

☒ Letter or ☐ Note ☐ Recommendation

Status

Approved with Conditions

Template

Approved With Conditions

Response

Concrete color must be Sandstone 123 from Proconcrete Colors

[View ARC Discussion Comments](#)

- a. Note that the message in the “response” field will be pulled into your letter so be sure it is clear and suitable to be included in owner correspondence. If the Committee was not involved in the approval process, put in your own description of the approval.
3. Scroll up and enter a “New Job” name. This is not public and can be anything.

Name Contains %

Status ☐ Show all ready for auto-approval

Date

New Job:

● ARC Committee Response

4. Hit Post. The letter will generate into your recent reports which can be printed/mailed, attached to an email, or emailed directly out of CINC.

Emailing the decision through CINC:

To access the request to be emailed, you can go into the homeowner’s correspondence tab, or you can access it from the Pending ACC Request screen.

1. Select the approved or denied status filter to find the request.
2. Click on the owner’s name to pull up the request.

Status ☐ Show all ready for auto-approval

Date

● ARC Committee Response

Pending ACC Requests

ARC Response - 08/18/2023

Lilly Aldrin & Marshall Erikson
105 Stull River Way # 786
Driveway 07/19/2023 Details

Next Contact

Completed Form Received

Create a ☒ Letter or ☐ Note ☐ Recommendation

Status

You will be directed to the notes for the specific request.

3. Select the “Letter-Private” and you can make additional edits to the letter on this screen before you send.
4. Check the checkbox next to the letter and hit Email at the top.

Send Email

E-Mail

Cancel

From

Acaldon@barkanco.com x

To

bharder@pinehills.com x

Q

(separate with semicolon ';')

CC

Q

(separate with semicolon ';')

BCC

Q

(separate with semicolon ';')

Subject

DR Request Approved by Board

Attachments	Date	Size
☐ Letter-Private.pdf	10/09/2024	121 KB
☐ Letter-Private.pdf	10/09/2024	121 KB
☒ Invoice (1) 11194.pdf	10/09/2024	56 KB
☒ ACC_Request_2024_10_09.pdf	10/09/2024	70 KB

5. A pop-up menu will appear to allow you to modify the email addresses and add a subject line.
 - a. Remove the owner's email address and put in the Pinehills representative's email to let them know it has been approved by the Committee. You can cc the owner if you'd like them to be aware of the status, but make sure it is clear in the decision letter that the Pinehills still need to approve.
 - b. Include any attachments from the request, not including the decision letter as it will populate into the body of the email.
6. Click E-mail to send for Pinehills approval.