CINC BEST PRACTICES

Navigation & Shortcuts

Be a more efficient user of CINC by using the navigation and shortcut tips below.

Open a New Tab

·Do you ever need to take a phone call and look up information for your caller, but don't want to leave the screen you are working on?
·Do you ever need to look at more than one screen in CINC at the same time?

If the answer is Yes to one or both questions just hover over the menu name for the additional screen you need to use, Right Click on the screen name, and choose Open in New Tab.

Expand Screen Viewing Area (Any Screen)

·Click on the CINC logo in the upper right corner of the screen to make the viewing area of any screen larger.
·Click the CINC logo again to restore the screen size and the left navigation panel.

Do Not Use the Browser Back or Refresh buttons (CINC & WebAxis)

·The Browser Back button only works well with sites that provide information that changes infrequently. If you use the Back button you may not be seeing information that is current.
·Using the Browser Refresh will bypass the cache of files that were previously downloaded and try to load them again.

Use Left Navigation Shortcuts

·Use less clicks to get to the last homeowner you accessed
(up to the last 5)
·Go from the property information screen to transaction history screen without a bunch of scrolling.
·Access Association screens in less clicks

CINC BEST PRACTICES

Navigation & Shortcuts (contd.)

Use Menu Shortcuts

·Click the main menu "Homeowners" to go directly to the Homeowner List screen.
·Click the main menu "Banking" to go directly to the Bank Account Register screen.
Homeowner Additional Screens Shortcut
·Search for the homeowner you need and hover over the checkbox next to their name. A pop-up will appear to allow you to navigate to the additional tabs without a bunch of clicking and scrolling.

Efficient Data Entry

·Enter data on a screen just like reading a book, from left to right and top to bottom.
·Use the tab key to navigate from field to field instead of taking your hands off the keyboard to use the mouse. Use Shift + Tab to move back to the previous field.

Use Statement Scheduler

·Don't have your team generating statements every month, instead use the Statement Scheduler to have CINC run the statements automatically.
Assign Vendor Types
·Create an additional search option for vendors and search for them by vendor type.

Date Format Shortcut

·Enter dates without any formatting. (No slashes, no dashes) Just type MMDDYYY.
·This can be used on the following screens:
oAccounting > ALL Screens with a Date Field.
oBanking > All Screens with a Date Field.

Reports with Association Multi-select

·Use the check-all and un-check all to clear the previously selected association(s) before selecting your association. This will prevent generation of a report for an association that you don't need or ensure that you don't have to scroll down the list and un-check the previously selected association(s).

CINC Systems

CINC BEST PRACTICES

Security Permissions

Here are some notes related to setting security permissions. To make deciding whether a security group needs a particular permission, I have added a table that defines which on-screen buttons are controlled by the permission type. (Add, Update, Delete, and View)

ADD	UPDATE	DELETE	VIEW
New	Save	Delete	View Only
Post	Download	Void	
Copy	Reconcile	Close	
Paste	Recurring		
Save & New	Decline		
Import	Transfer		
Publish	Approve		
Merge			
WriteOff			

Secure Sensitive Information

··Banking / Bank Accounts
·Banking / Miscellaneous Checks
·Banking / Transfers
·Banking / Pending Transfers
·Banking / Reconcile Checkbook
·CINC Client / Print Checks
·Homeowners / Homeowner ACH Information
·Management / All Areas

Field Level Security

·Homeowner Information
·Homeowner Addresses
·Maintain FAQs
·User Preferences – Personal Info
·User Setup
·Vendor Information

CINC BEST PRACTICES

Accounting Best Practices

Here's a list of the suggested best practices for Accounting in CINC.
·Set & Resolve Alerts Daily
·Daily Bank Reconciliation
·Post Lockbox Daily
·Post Bank Returns Daily
·Run Mid-Month financial reports (Balance Sheet, Aging & Prepaid Homeowners)
- Compare A/R total from Aging to Balance Sheet A/R
- Compare Prepaid total from report to Balance Sheet Prepaid
- Use Aging report with credits to check for orphaned credits
·Month End Prep after reconciling the last day of the month, run Bank Reconciliation report for all accounts.
- Use Ctrl F to find "Difference" (this will allow you to see which accounts are not reconciled)
·Month End – Run Preliminary Financials for review by Accountant & Manager to identify edits needed.
·Month End – Run Final Financials for Email or Publish to WebAxis
·Close Fiscal Periods

7 Resources for Help

Here's a list of the resources available to help you and your team with answers to questions.
·Webinar Schedule – Recorded Videos
·Webinar Schedule – Monthly Webinar Registrations
·Help > User Training Guide
·Help > Support > Find An Answer
·Help > Support > My Cases and Search to find a previous case with the answer
·Help > Support > Submit a Case
Reach out to your CINC Account Manager

CINC Systems