

EXIT ASSOCIATION QUICK REFERENCE GUIDE

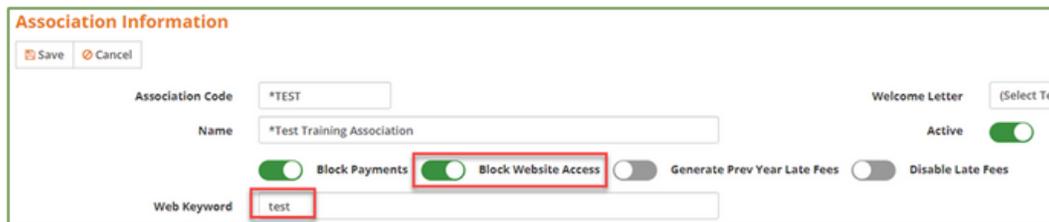
Block Payments



The screenshot shows the 'Association Information' form. At the top left are 'Save' and 'Cancel' buttons. The 'Association Code' field contains '*TEST'. The 'Name' field contains '*Test Training Association'. On the right, there is a 'Welcome Letter' dropdown set to '(Select Te...', an 'Active' toggle switch that is turned on, and four other toggle switches: 'Block Payments' (highlighted with a red box and turned on), 'Block Website Access' (turned off), 'Generate Prev Year Late Fees' (turned off), and 'Disable Late Fees' (turned off).

- Select Setup/Association Setup select association
- o Payments must be blocked on the last business day of the month by 2:30pm EST.
- o Blocking payments will NOT prevent a deposit from being made if the bank account is still open.
- o Credit card payments that initiate one day and are not deposited until days later will not be affected by the block

Block Website Access



The screenshot shows the 'Association Information' form. At the top left are 'Save' and 'Cancel' buttons. The 'Association Code' field contains '*TEST'. The 'Name' field contains '*Test Training Association'. On the right, there is a 'Welcome Letter' dropdown set to '(Select Te...', an 'Active' toggle switch that is turned on, and four other toggle switches: 'Block Payments' (turned on), 'Block Website Access' (highlighted with a red box and turned on), 'Generate Prev Year Late Fees' (turned off), and 'Disable Late Fees' (turned off). At the bottom left, the 'Web Keyword' field contains 'test' and is also highlighted with a red box.

- Select Setup/Association Setup select association
- o Block Website Access prevents homeowners from logging into their WebAxis account
- Remove the Web Keyword to prevent the association website from appearing in case homeowners have saved the URL



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Block ACH Payments

The screenshot shows the 'Association Information' form with the following fields and values:

- Association Code: *TEST
- Name: *Test Training Association
- Block Payments:
- Block Website Access:
- Generate P:
- Web Keyword: test
- Manager: CINC Trainer
- Assistant Manager: (Select Assistant Manager)
- Type: HOA
- Region: (On Charge Date)
- AR Accounting Type: 1 (Next ACH Batch will generate on 10/23/2023)
- AP Accrual Type: 2 (Next ACH Batch will generate on 10/26/2023)
- Address Line 1: 3 (Next ACH Batch will generate on 10/27/2023)
- Address Line 2: 4 (Next ACH Batch will generate on 10/28/2023)
- City / State / Zip: 5 (Next ACH Batch will generate on 10/29/2023)
- Tax ID: 6 (Next ACH Batch will generate on 10/30/2023)
- State Employer Account Number: 7 (Next ACH Batch will generate on 10/31/2023)
- Sales Tax Rate: 8 (Next ACH Batch will generate on 11/1/2023)
- ACH Billing Day: 9 (Next ACH Batch will generate on 11/2/2023)
- Max Signature Amount: \$5,000.00

The dropdown menu for 'ACH Billing Day' is open, showing options 1 through 19. Option 11 is selected, with the text: '11 (Next ACH Batch will generate on 11/6/2023)'. Options 12 through 19 are in red text, indicating they are past dates.

- Select Setup/Association Setup select association scroll to ACH Billing Day
 - o Change ACH Billing Day to a future date to prevent ACH Payments from generating
 - o On Homeowner Information - Remove Homeowner bank account information & change billing type
 - o Address ACH Batch - Remove ACH payment from homeowner's ledger or Void ACH as Bank Adjustment

Disable Charge Schedule

The screenshot shows the 'Charge Schedule' form with the following fields and values:

- Description: Late Fee
- Frequency: Monthly
- On: 5
- Enabled:

The 'Enabled' toggle switch is highlighted with a red box.

- Select Homeowners/Post Charges

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Invoice Settings

Invoicing Privileges - *Test Training Association

Save Cancel

Total Approvals Required: 1

Add	Req	Available Users
<input type="checkbox"/>	<input type="checkbox"/>	CINC Trainer (Administrator)
<input type="checkbox"/>	<input type="checkbox"/>	Mackenzie Justice (Administrator)

Total Board Approvals Required: 0

Vendor Types Requiring Board Invoice Approval

<input type="checkbox"/>	Not Assigned
<input checked="" type="checkbox"/>	Attorney
<input checked="" type="checkbox"/>	Bank

- Select Setup/Association Setup select association and click on the Invoicing tab
 - o Change the Total Board Approvals Required to zero to stop the board from receiving invoice approval notifications
 - o Void pending invoices if needed

Delete WebAxis Registrations

CINC systems

User: Training | View User Guide | Log out

DASHBOARD

MANAGE CONTENT

TEMPLATE

ADMINISTRATION

Approve Pending Registrations

Broadcast Emails

Manage Reservations

Manage Homeowners

Manage Payment Providers

Manage Registered Homeowners

*Yellow highlight indicates homeowner is a member of a board and/or committee.

Tenant: *Test Training Association *TEST

View: All Users Except Previous

User Name	Account	Address	Email	Contact
John Johnson	**TEST1250PL	1250 Sunny Field Lane	test@test.com Board/Committee: ACC/ARC Committee	H: W: R:

Delete Registered User Re-assign Account Re-set Password

- In your WebAxis admin portal select ADMINISTRATION/Manage Homeowners select association
 - o Hold the shift key to select multiple homeowners then click Delete Registered User
 - o To give users access to their account on the last day of the month, wait until the first business day of the next month to delete their registration



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Export Association Information

Data Export

Generate Delete Refresh Cancel Dashboard

Export On: 11/10/2023 Include Images:

*Test Training Association

If you choose to export images, the files are sent out on the following Thursday via SharePoint. Please follow the link to access and download files within two weeks from the day received before permissions expire. There is a \$50 fee for this service for each file requested. If you choose not to export images, your file will be available in the queue the following morning of the day chosen to extract.

Pending Exports	User	Run Date	Include Images
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·Select Tools/Data Export

o If you choose not to export images, your file will be available in the queue the following morning of the day chosen to extract.

Export will include: Association Information, Chart of Accounts, Account Descriptions, Checkbook, Checkbook Transactions, GL Transactions, Homeowner Address and Information, Homeowner Transactions, Invoices, Vendor and Vendor Contacts

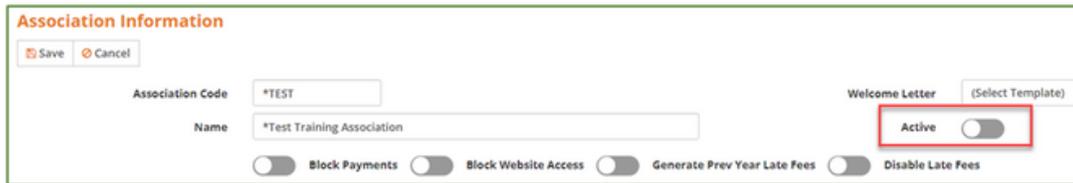
o If Export Images is selected, the files are sent out on the following Thursday via SharePoint to the requesting user's email address.

Export will include everything above and images of: Checks, Invoices, Homeowner Correspondence Attachments, Association Notes Attachments, Vendor Notes Attachments



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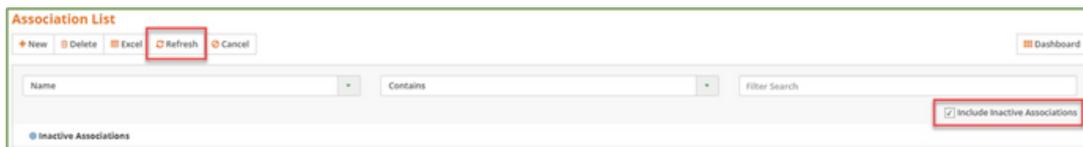
Deactivate Association



The screenshot shows the 'Association Information' form. At the top left are 'Save' and 'Cancel' buttons. The 'Association Code' field contains '*TEST'. The 'Name' field contains '*Test Training Association'. On the right, the 'Welcome Letter' dropdown is set to '(Select Template)'. Below this is the 'Active' toggle switch, which is currently turned off and highlighted with a red box. At the bottom, there are four other toggle switches: 'Block Payments', 'Block Website Access', 'Generate Prev Year Late Fees', and 'Disable Late Fees', all of which are currently turned on.

- Select Setup/Association Setup select association
 - o Deactivate association at the close of business on the last day of managing the association. You can make the association active again at any time to work in it
 - o Toggle off the Active button and click Save
 - o When you make the Association Inactive, the system will automatically delete the Webaxis recurring payments during the overnight process.

Accessing a Deactivated Association



The screenshot shows the 'Association List' form. At the top left are buttons for '+ New', 'Delete', 'Excel', 'Refresh', and 'Cancel'. The 'Refresh' button is highlighted with a red box. On the right is a 'Dashboard' button. Below the buttons are three search fields: 'Name', 'Contains', and 'Filter Search'. At the bottom right, there is a checkbox labeled 'Include Inactive Associations', which is checked and highlighted with a red box. Below the search fields, there is a link for 'Inactive Associations'.

- Select Setup/Association Setup
 - o Check the box next to Include Inactive Associations click Refresh on the screen

