Vantaca March 2026 Release Notes

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★ Latest updates appear at the top of tables • Updated throughout the month

☆ Highlights This Month

- CMP: "Service Provider" has been renamed to "Vendor" throughout CMP to align with Vantaca Vendor terminology. This affects Action Items, the Change Step screen, and Vendor contact fields.
- CMP: Individual files in Association Documents can now be renamed via right-click.
- CMP: Action Item notes now show which specific users were included in each Send To role at the time the note was logged.
- CMP: Multiple fixes for Avid Consolidated Checks, including voiding, report visibility, GL detail, and incorrect invoice dates.
- CMP: Deposit balances no longer appear in the Balance Summary merge tag or the Collections Report.
- CMP: Collections balance automation logic no longer breaks when Hold Until Follow-Up Date is auto-assigned to balance-threshold steps.

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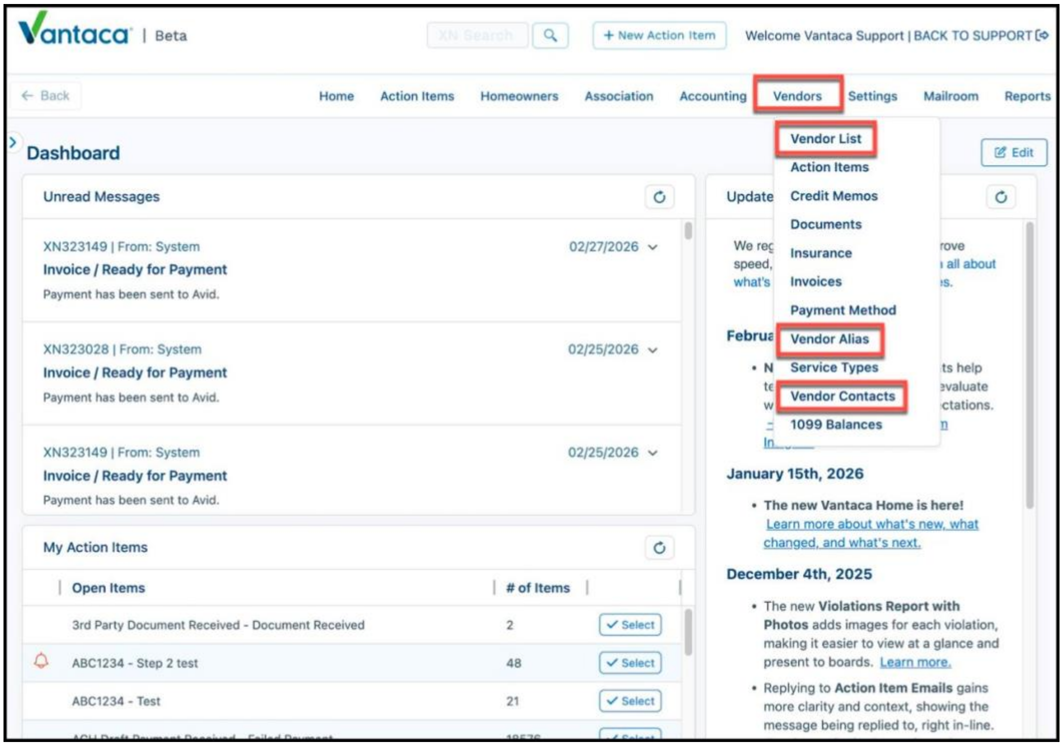
New Features This Month

CMP: "Service Provider" Renamed to "Vendor"

To align with Vantaca Vendor terminology, all instances of "Service Provider" throughout CMP have been updated to "Vendor." This is a significant terminology change that affects multiple areas of the application and brings CMP in line with the broader Vantaca platform.



Where the Change Appears

- Main menu option (Provider is now Vendors and includes updated submenu options)
- Column headers in My Action Items and All Action Items (Provider column is now Vendor)
- The Action Item screen (Service Provider section is now Vendor)
- The Change Step screen (Service Provider field is now Vendor)
- Vendor contact fields throughout CMP

References to "Service" within Contracts remain unchanged, as that terminology is specific to the Contracts feature.

Related Articles:

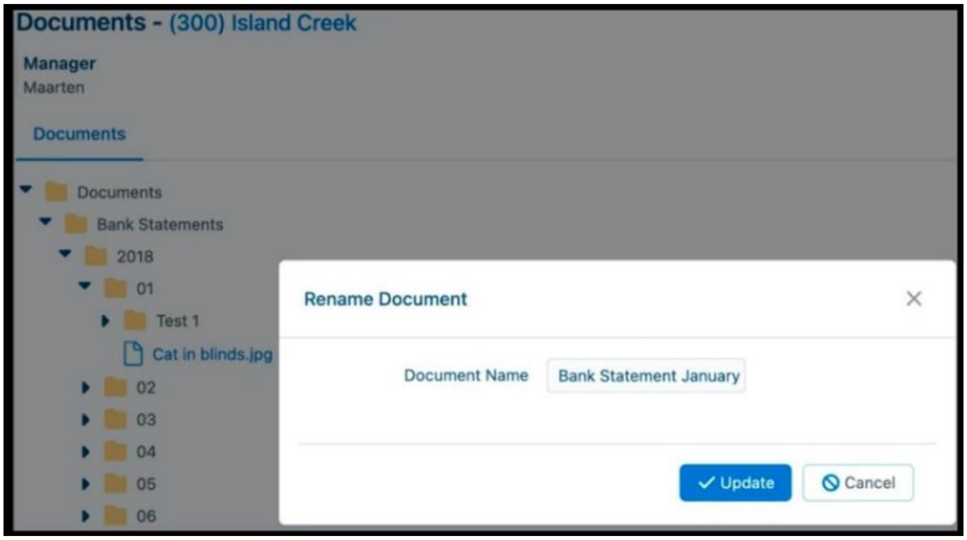
- Support articles will be updated.

CMP: Rename Association Documents

Users can now rename individual files in Association Documents using a right-click context menu. Previously, only folders could be renamed. Renaming a file required deleting and re-uploading it to correct the name.

How It Works

Right-clicking a file and selecting Rename Document opens a simple screen with a text input. File extensions are preserved automatically. Validation prevents duplicate names within the same document type and disallows invalid characters. Allowed characters are letters, spaces, numbers, and the following special characters: _ - . + $



Action Type Warning

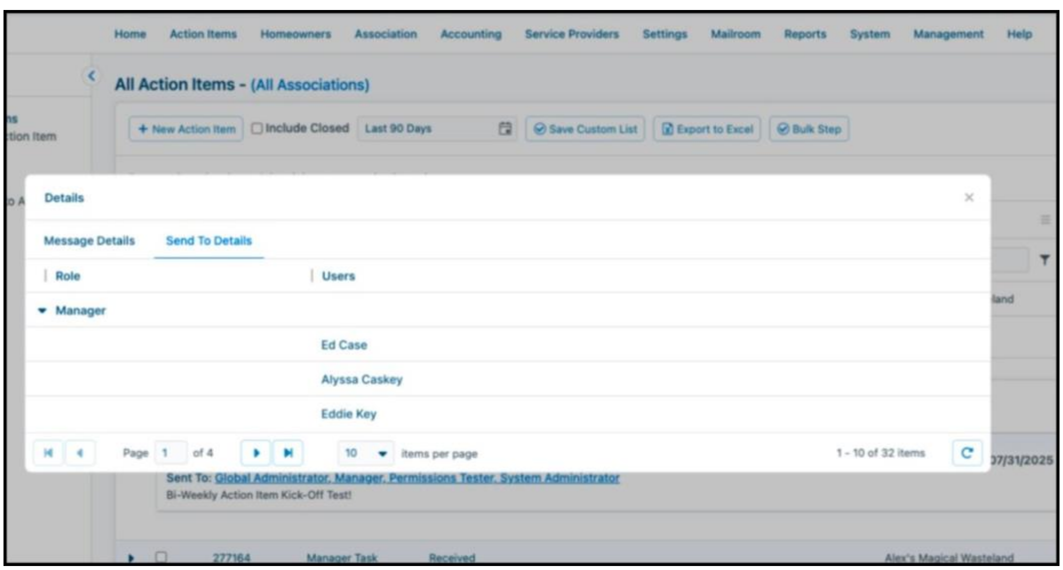
If the file is referenced in an Action Type step, a warning lists the affected Action Types and Steps before the rename is confirmed. This prevents broken document paths from action type configurations.

Related Articles:

- [Association Document Library and Security]

CMP: Send To Message Details

Action Item notes now include a record of exactly which users were in each Send To role at the time the note was logged. This gives users full visibility into who received each outbound communication, without needing to reconstruct role membership after the fact.



How It Works

A new Send To Details tab has been added to the message details screen. This tab shows the users associated with each role for that specific note, including Message, Step, and Reply notes. The data is retained indefinitely. By default, the first role's user list is expanded. Users can drill into any role to see the full list of recipients at the time of the note.

Related Articles:

- [My Messages, My Action Items, and All Action Items]()

Improvements

Release Date	Details	Customer Impact	Roles Affected	Related Articles
CMP March 25, 2026	**Hold Until Follow-Up Date Breaking Collections Balance Automation** When a Collections action step had Days to Remain at Step greater than 1, the system automatically assigned the Hold Until Follow-Up Date additional action. For steps where Decision Required was set to Balance > Threshold or Balance > Lien Threshold, this override was breaking the balance automation logic. The system now sets Additional Action to "No Additional Action" for these step types, preserving the intended balance-based decision flow.	Collections workflows using balance-threshold decisions now process automatically as intended, without manual intervention to correct stalled steps.	Community Managers Accounting	Action Type Rules Overview of Collections in Vantaca
CMP March 25, 2026	**Invoice Field Changes Attributed to "System" Instead of Acting User** When a user made changes to an invoice during a workflow step (such as Complete Data Entry), the Action Item note logging the field changes displayed "System" as the author instead of the actual user. The workflow step note correctly showed the user, but the accompanying field change detail did not. Invoice field change notes now correctly display the acting user as the author.	Users and auditors reviewing invoice change history can now identify who made each field change without cross-referencing the workflow step note separately.	Accounting	N/A
Revenue Manager March 25, 2026	**New Payment Adjustments Ledger Transaction Type Added** A new Payment Adjustments option has been added to the Ledger Transaction Type dropdown in Admin > Charges and Payments > Ledger Activity. This option applies adjustment-aware logic: it counts all payments and reduces the admin charge if a payment adjustment was applied to a billable charge. The original Payments option has been restored to its pre-adjustment behavior, counting all payments without factoring in any adjustments.	Users can now choose between Payments (charges based on all payments only) and Payment Adjustments (charges reduced when a payment adjustment is applied) when configuring Ledger Activity. Existing records configured as Payments are unaffected.	Accounting	Revenue Manager: Contracts and Templates
IQ March 25, 2026	**Action Item Insights: Last Updated Date Metric Corrected** The Last Updated Date metric in Action Item Insights now reflects the most recent date of any activity on an action item, including notes and messages added within a step. Previously, it only reflected the last time an action item was stepped.	The Last Updated Date metric now accurately reflects all activity on action items, giving users a more complete picture of recent updates.	All roles	Vantaca IQ: Action Item Insights
IQ March 25, 2026	**Action Item Insights: Employee Filter Now Matches Open Items Definition** The employee filter in Action Item Insights now matches the Open Items definition used on the Employee Listing page. When an employee is selected, results reflect their full role-based purview rather than filtering by Assigned To only. Selecting a specific responsibility further narrows results to that responsibility.	Filtering by employee in Action Item Insights now returns consistent results with other IQ tools, giving managers an accurate view of an employee's full workload.	All roles	Vantaca IQ: Action Item Insights

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IQ March 25, 2026	**Action Item Insights: Performance Issue Resolved for Large Portfolios** Resolved a performance issue with the Action Item Insights filter query that caused data to fail to load for users with large portfolios.	Users with large portfolios can now reliably load and filter data in Action Item Insights without encountering load failures.	All roles	Vantaca IQ: Action Item Insights
Manage Mobile March 18, 2026	Photos added to violations and work orders now display a timestamp showing when the photo was taken. This applies to photos taken within the app and to photos selected from the device photo library. The timestamp persists throughout the violation or work order lifecycle and is visible in both the gallery view and detail view.	Photos on violations and work orders will now show when they were taken, making it easier to document and track the timeline of issues.	Violation Managers	Vantaca Manage App: Violations Vantaca Manage App: Work Orders
Manage Mobile March 18, 2026	Users can now select a Reissue option when updating an existing violation, allowing them to reissue a notice, apply additional fines, or update violation details while remaining on the same step. The Step dropdown displays a Reissue [Step Name] option for steps configured as reissuable, positioned directly below the current active step. Reissued steps are recorded in the violation history.	Violation managers can now reissue notices and apply fines at the same step without being forced to advance the workflow. This supports associations that require a step to repeat before escalating, reducing incorrect violation histories and unintended escalations.	Violation Managers	Vantaca Manage App: Violations
Integrations March 17, 2026	Avid Consolidated Checks can now be voided correctly. Previously, voiding a consolidated check only voided the parent ledger record and marked child ledgers as inactive, but did not create a void record on the AP Ledger. The void process now updates the AP Ledger as expected.	Avid users who void consolidated check payments will now see the void reflected correctly in the AP Ledger, ensuring records remain in balance.	Accounting	N/A
Manage Mobile March 12, 2026	Photos and required action notes can now be added to an existing violation without modifying the step. When a violation is updated without advancing the step, a new action item note is created rather than overwriting the previous note. Notes are attributed to the correct user, and the most recent image is displayed by default.	Violation updates from the Manage app will no longer overwrite previous notes or misattribute them to the wrong user. The most recent photo will display automatically.	Violation Managers	Vantaca Manage App: Violations
CMP March 10, 2026	Added the ability for associations to upload a custom image for amenities in CMP through the New Amenity screen. This image will display in Vantaca Home.	Associations can now display custom amenity images in Vantaca Home.	System Admins	Set Up the Vantaca Home Portal Enabling Amenity Reservations for your Homeowner Portal
CMP March 5, 2026	The Void button has been restored in the Bank Register for invoices paid via the Avid pay type. When a user clicks Void, a confirmation pop-up now appears with the message: "This payment must also be voided in Avid or your records will fall	Users processing Avid payments can now void invoices directly from the Bank Register. A confirmation prompt	Accounting	Void a Payment and/or Invoice

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	out of sync." The user can confirm to proceed with the void or cancel to abort.	ensures users are aware the void must also be completed in Avid to keep records in sync.		

Corrections

Release Date	Details	Customer Impact	Roles Affected	Related Articles
CMP March 25, 2026	**Multiple Fixes for Avid Consolidated Checks** • **Cash Disbursement (Standard) report missing GL details:** GL expense lines for Avid Consolidated Checks on accrual-based associations were not appearing on the standard Cash Disbursement report. GL details now display correctly. • **Cash Disbursement (Variable Start Date) report missing consolidated checks:** Avid Consolidated Checks were not appearing in the Variable Start Date version of the Cash Disbursement report. They now appear consistently across all Cash Disbursement report types. • **Incorrect invoice date on Bank Register:** Consolidated Check payments were showing the day before the actual transaction date on the Bank Register due to a timezone handling issue. Invoice dates now match the transaction date. • **Void process not creating AP Ledger void records:** Voiding an Avid Consolidated Check batch was marking child ledgers as inactive but not creating the corresponding void record on the AP Ledger. The void process now creates the correct AP Ledger void record for all affected entries.	Accounting staff using Avid Consolidated Checks will see accurate GL details on reports, correct dates on the Bank Register, and properly recorded voids.	Accounting	N/A
CMP March 25, 2026	**AP Ledger Entries Duplicating in Audit View** AP Ledger entries were appearing duplicated in the Audit view under Vendors > Invoices for invoices posted by Avid (Strongroom). The back-end data was accurate. This was a front-end display issue only. The Audit view now correctly shows one entry per AP Ledger record.	Users reviewing the Invoice Audit view no longer see duplicate AP Ledger entries.	Accounting	Viewing Invoices Using the Vendors Invoices Page
CMP March 25, 2026	**Action Item Notes Not Paginating Beyond 50 Records** Action Items with more than 50 notes were not showing a paginator, making notes beyond the first 50 inaccessible from the Action Item Notes view. Pagination now appears correctly and all notes are accessible.	Users working on long-running Action Items can now view all notes without leaving the Action Item Notes view.	All roles	My Messages, My Action Items, and All Action Items
CMP March 25, 2026	**Orphan General Inquiry Emails Linking to Incorrect Account** For owners with multiple properties, general inquiry emails were intermittently being linked to a	General inquiry emails from owners with multiple properties are now routed correctly,	Community Managers	N/A

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	specific account rather than arriving as orphans for manual assignment. The process has been corrected so emails that cannot be definitively matched to a single account are handled as orphans.	reducing misattributed Action Items.		
CMP March 25, 2026	**Applied Credit Memos Displaying as Negative Balances** Applied Credit Memos were appearing as negative balances in the Vendors > Credit Memo view and the Accounting > Pay Invoice view. The actual balance was $0. This was a visual display issue caused by the stored procedure used in both views. Credit Memos with a $0 balance now display correctly.	Users reviewing Credit Memos or paying invoices no longer see misleading negative balances on fully applied credits.	Accounting	Credit Memos - Setup Credit Memos - FAQ
CMP March 25, 2026	**Bulk Action Item "Other Email" Only Sending to First Address** When initiating a Bulk Action Item from the Homeowner List and entering multiple addresses in the "Other Email" field, only the first email address was being included. The Other Email field now correctly includes all entered addresses when a bulk Action Item is initiated.	Users sending bulk Action Items with multiple Other Email recipients now have all addresses included in the communication.	Community Managers	What is an Action Item? How to Create Bulk Action Items from the Homeowner or Association Lists
CMP March 25, 2026	**Last Zero Balance Statement Not Reflecting All Outstanding Charges** The Last Zero Balance Statement was omitting outstanding charge detail lines when a Credit Distribution had been applied to the same account. The Pay This Amount field showed the correct total, but the statement body did not list the underlying charges. The statement now includes all outstanding charge detail lines regardless of applied credits.	Homeowners and managers reviewing Last Zero Balance Statements now see a complete and accurate breakdown of all outstanding charges.	Accounting	Generate Statements (Billing Reference)
CMP March 25, 2026	**Next Step Instructions Showing Content from Previous Step** When a workflow step had only one possible next step, the instructions field sometimes displayed content from a previous step rather than the correct next step. This occurred without a page refresh and required manually reselecting the next step to clear the stale content. Step instructions now populate correctly based on the selected next step.	Users stepping Action Items no longer see incorrect instructions carried over from a previous step.	All roles	Action Type Rules
CMP March 25, 2026	**Statements Including Assessments Set to Billing Format = None** Assessments with a Billing Format of "None" were appearing on generated statements across all statement action types. Only assessments set to "Statement" or "Coupons" should appear. Statements now correctly exclude assessments with Billing Format = None.	Generated statements now only include the assessments intended for homeowner billing, reducing confusion from unexpected line items.	Accounting	Generate Statements (Billing Reference)
CMP March 25, 2026	**Recurring GL Entries Not Posting on Scheduled Date** Recurring GL Entries were not posting on their configured Start Date, requiring manual intervention. A date validation fix now prevents	Accounting staff can rely on Recurring GL Entries to post automatically on the scheduled date without manual intervention.	Accounting	Recurring GL Entries - coming soon How to Setup GL

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	users from setting a Start Date of today or earlier, and a tooltip explains the requirement. Entries configured with a future date now post automatically as intended.			Beginning Balances
CMP March 25, 2026	**Collections Action Items Incorrectly Appearing for Board Member Approval** Collections Action Items that had only reached the "Send Homeowner Statement" step were appearing in the Board Member's Collections tab in the Portal with an Approve/Decline option. The step was configured with a Balance > Threshold decision, not a board approval step. The Collections tab now only shows Action Items that have genuinely reached a board approval step.	Board Members no longer see Collections items requiring action when no board approval has been triggered, reducing confusion in the Portal.	Board Members Community Managers	Overview of Collections in Vantaca Action Type Rules
CMP March 25, 2026	**Deposit Balances Incorrectly Included in Collections Balance Calculations** • **Balance Summary merge tag:** Deposits were appearing in the Balance Summary merge tag used in Collections communications, inflating the balance shown to homeowners. • **Collections Report:** Deposit balances were being included in the Collection Balance on the Collections Report, overstating amounts owed. Both issues have been resolved. Deposit balances are now excluded from Collections balance calculations in both areas.	Collections communications and the Collections Report now reflect accurate balances that exclude deposit amounts, reducing confusion for homeowners and staff.	Community Managers Accounting	N/A
CMP March 25, 2026	**Combine Attachments Setting Being Ignored on Action Type Steps** Action Type steps with Combine Attachments disabled were still combining attachments into a single PDF when generating documents. The step-level setting was being overridden by the Action Item note-level setting. The step-level Combine Attachments configuration now takes precedence and is respected during document generation.	Documents generated from Action Type steps now correctly follow the Combine Attachments setting configured on each step.	Community Managers	Action Type Rules
CMP March 25, 2026	**Inhouse Statement Generation Error** An error was occurring when stepping a Collections action item that sends a letter and a statement, causing the statement generation to fail. The issue has been resolved and statements now generate correctly during Collections workflow steps.	Users stepping Collections action items that include statement generation no longer encounter generation errors.	Community Managers Accounting	N/A
CMP March 25, 2026	**Late Fee Dates Extending Past End of Month Not Reflecting Properly in Statement Language** Late fee dates extending past the end of a month were not pulling the correct late fee date on third-party statements and in-house statements. The date calculation has been corrected so that late fee dates display accurately in all statement formats.	Statement language now correctly reflects late fee dates even when those dates fall past the end of a month.	Accounting	N/A
Manage Mobile March 18, 2026	The app was crashing when loading the home screen if a needs-attention inspection contained unhandled date formats. All date formats are now handled correctly, and if a date cannot be processed, the field displays blank rather than causing a crash.	Android users will no longer experience a crash on the home screen caused by date formatting on inspection items.	All Users	N/A

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Manage Mobile March 18, 2026	Resolved an issue on iOS where the screen was cut off and content was difficult to view or interact with. The layout now renders correctly regardless of the device text size setting.	iOS users will no longer experience content being cut off due to text size settings on their device.	All Users	N/A
CMP March 11, 2026	Print queue jobs were not printing in the expected order. Items were printing in a non-alphabetical sequence inconsistent with prior behavior.	Print queue output will now follow the expected ordering.	All Users	Print Queue 101
CMP March 9, 2026	The Combine Attachments setting on action steps was being ignored when the Mail Format was set to any option other than Mailing Addresses Only. Attachments were combining into a single PDF file regardless of the Combine Attachments configuration. The Mail Format and Combine Attachments settings are now decoupled so that only the Combine Attachments toggle determines whether attachments are merged.	Action items that use multiple letter attachments on a step will now correctly generate separate PDF files when Combine Attachments is disabled, regardless of the Mail Format setting.	System Admins Workflow Managers	Action Type Rules
CMP March 3, 2026	When the Call Center Enhancements feature flag was enabled, the homeowner name was not populating in the Owner field when an incoming call was matched via Caller ID. Association, property address, and account number all populated correctly. The homeowner name now displays as expected.	Users with phone system integration and Call Center Enhancements enabled will now see the homeowner name populate automatically when Caller ID matches an account.	Call Center	Call Center - Action Items and Phone System Automation