

Vantaca Release Overview for Sys Admins

September 28, 2023 Release

Vantaca Features

Step Instructions

Added the ability to view **Step Instructions** when stepping an Action Item.

- If an Action Item has Instructions configured, a **Step Instructions** drill down can be opened to view instruction details on the Change Step form.

The screenshot shows a 'Change Step' dialog box. The 'Current Step' is '1 - Collect Breakfast Orders'. Below it, a dropdown menu is open for 'Instructions', showing a list of instructions: 'In Order to Correct breakfast orders the following check list should be reviewed:', followed by a numbered list: '1. 1111', '2. 112', and '3. 214421412'. The 'Next Step' is '2 - Allocate Breakfast Funds'. Below it, a dropdown menu is open for 'Next Step Instructions', showing two lines of text: 'Tag for account: [-Account Number-]' and 'Tag for association: [-Association Name-] with code [-Association Code-]'. The text 'Italic right aligned' is visible at the bottom right of the dropdown. Below the instructions, there are fields for 'Follow Up Date' and 'Due Date', each with a calendar icon.

CCR Delete Protection

Added **Delete Protection** to CCR Items.

- Attempting to Delete a CCR item that is being used by other associations will result in the following message:
 - "[CCR Description]" is currently being used by [#] association(s) including the following association(s):
[Association Name (Code)]
Do you wish to continue?

Copy Action Items

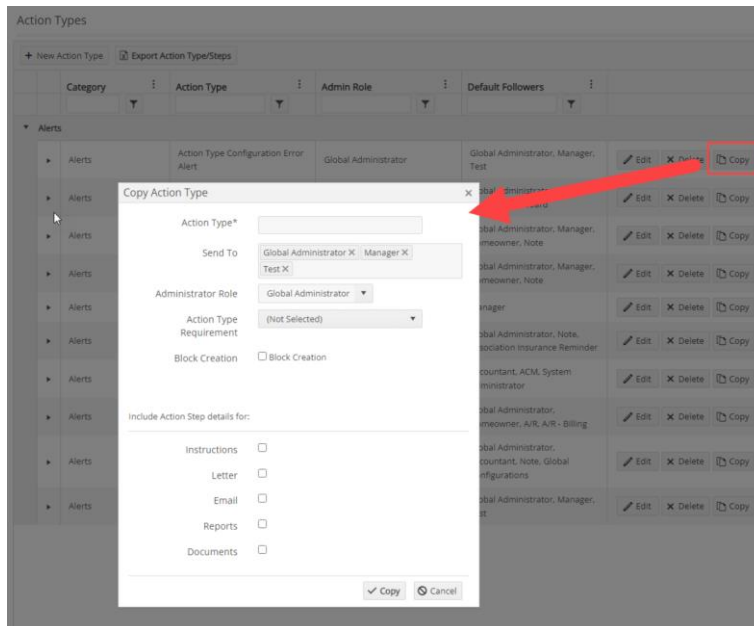
Added the ability to Copy Action Item workflows.

- A **Copy** button has been added to **Settings > Action Type/Steps** which will open the **Copy Action Type** form:
- A new **Action Type** is required to copy successfully.
- All Action Type Settings and Steps will be copied from the original by default.
- The following Action Step Details can be included, if needed, via the accompanying checkbox:
 - Instructions



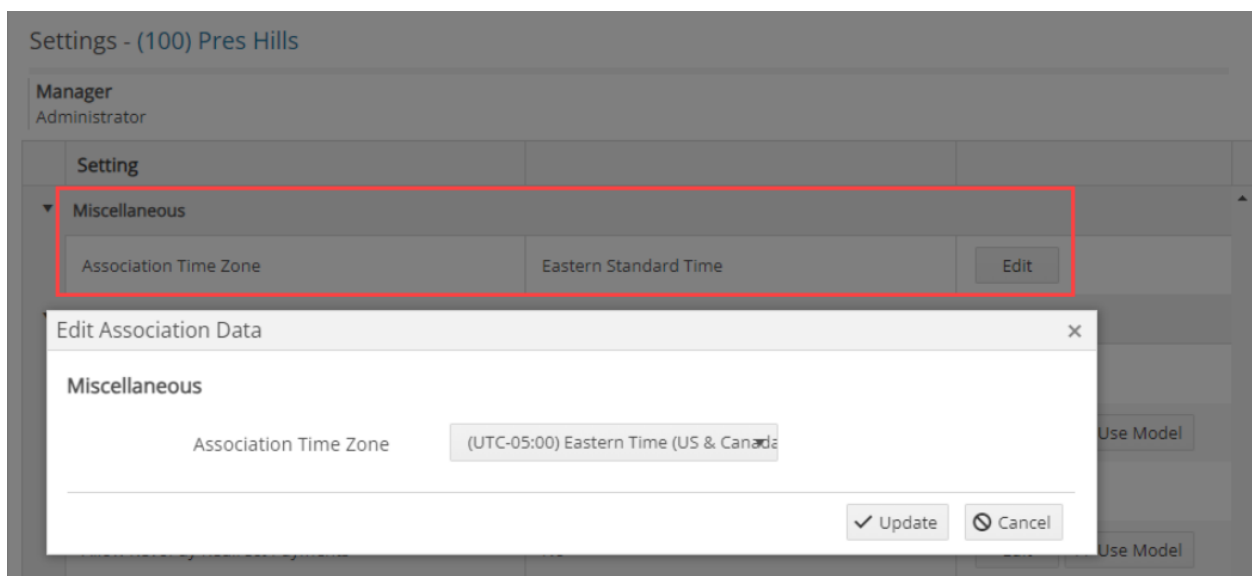
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- Letter
- Email
- Reports
- Documents
- A **Copy** permission has been added to **Settings > Roles > Security > Action Item > Action Types**.



Time Zone Setting

Association Time Zone was added to the **Association > Settings > Miscellaneous** section.



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