

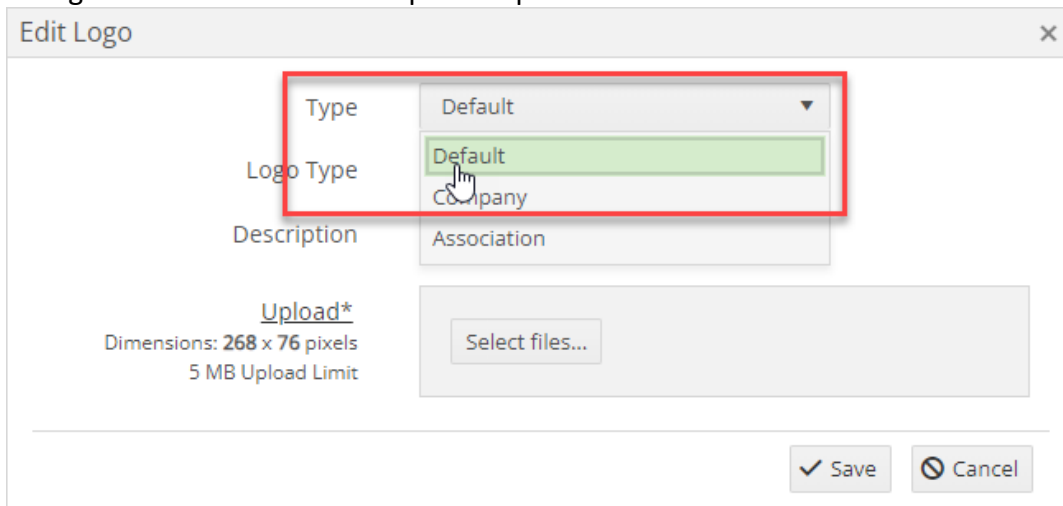
Vantaca Release Overview for SysAdmins

December 13, 2023 Release

Vantaca Features

Logo Management

Added a Default option to **Settings > Logo Management > Edit/New Logo** form which will allow the same logo to be used across multiple Companies.

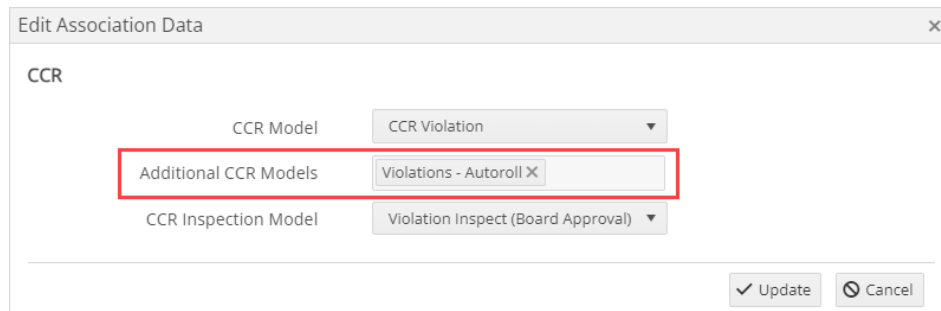


The screenshot shows the 'Edit Logo' form. The 'Type' dropdown menu is open, showing 'Default' as the selected option. The 'Logo Type' dropdown is also open, showing 'Default' as the selected option. The 'Description' field contains 'Association'. The 'Upload*' section shows 'Dimensions: 268 x 76 pixels' and '5 MB Upload Limit'. There is a 'Select files...' button and 'Save' and 'Cancel' buttons at the bottom.

Preferred Action Types

The following additions were made to Association Action Items

- **CCR**
 - Added an **Additional ARC Models** field to the **Association > Settings > CCR > Edit Association Data** form.

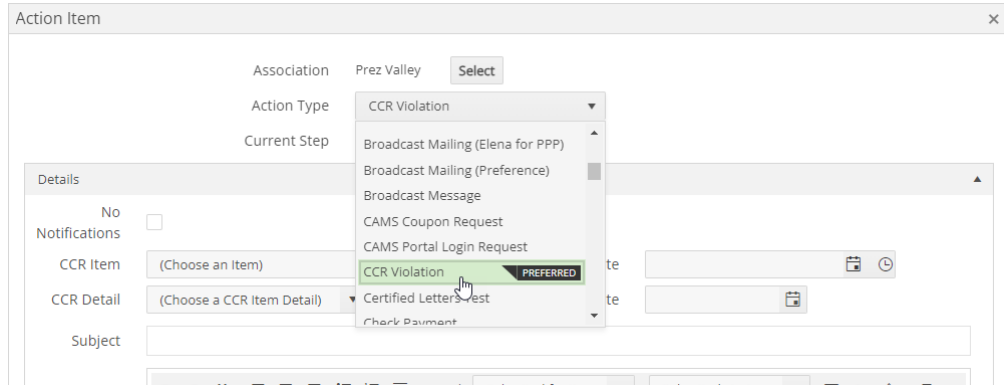


The screenshot shows the 'Edit Association Data' form. The 'CCR' section is visible. The 'CCR Model' dropdown is set to 'CCR Violation'. The 'Additional CCR Models' field is highlighted with a red box and contains 'Violations - Autoroll X'. The 'CCR Inspection Model' dropdown is set to 'Violation Inspect (Board Approval)'. There are 'Update' and 'Cancel' buttons at the bottom.

- **Note:** Field supports multiple entries.
 - Creating New Action Items that are tied to an Association will now only include configured Models as available options in the Action Item's CCR Types.
 - **Example:** Based on the settings in the screenshot above, only two violation/CCR action types would be available in the dropdown, CCR Violation (seen in the screenshot below) and Violation Inspect (Board Approval) option.

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- The CCR Model's selected Action Type will now have a Preferred tag on the Action Type dropdown when creating a new Action Item.

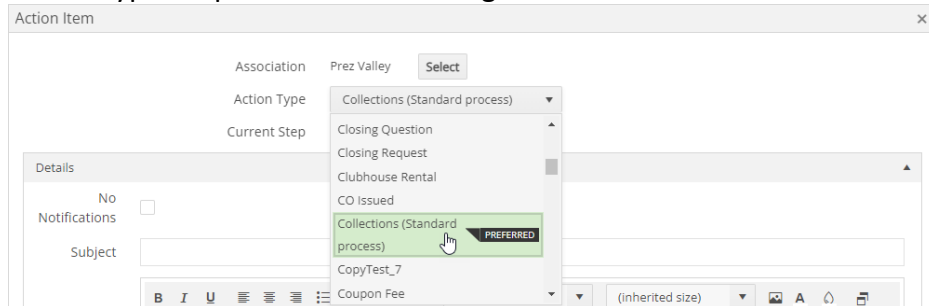


The screenshot shows the 'Action Item' form. The 'Association' is set to 'Prez Valley'. The 'Action Type' dropdown is open, showing 'CCR Violation' selected with a 'PREFERRED' tag. Other options include 'Broadcast Mailing (Elena for PPP)', 'Broadcast Mailing (Preference)', 'Broadcast Message', 'CAMS Coupon Request', 'CAMS Portal Login Request', 'Certified Letters Test', and 'Check Payment'. The 'Current Step' is 'Broadcast Mailing (Preference)'. The 'Details' section includes 'No Notifications' (unchecked), 'CCR Item' (Choose an Item), 'CCR Detail' (Choose a CCR Item Detail), and 'Subject'.

- **Collections**

- Added an **Additional Collections Models** field to the **Association > Settings > Collections > Edit Association Data** form.
 - **Note:** Field supports multiple entries.
- Creating New Action Items that are tied to an Association will now only include configured Collections Models as available options in the Action Item's Collection Types.

- The ARC Model's selected Action Type will now have a Preferred tag on the Action Type dropdown when creating a new Action Item.

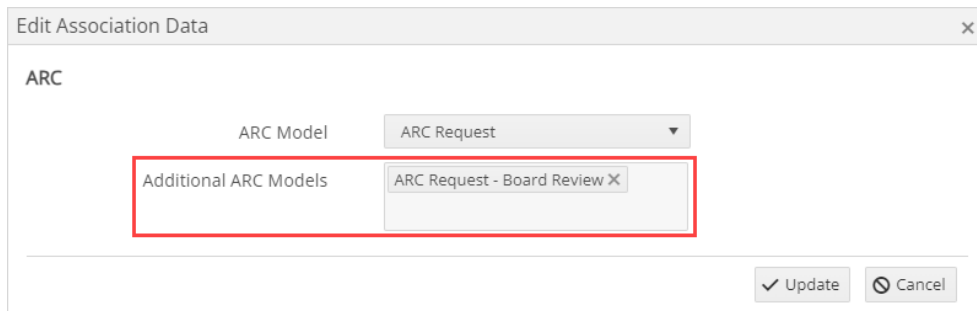


The screenshot shows the 'Action Item' form. The 'Association' is set to 'Prez Valley'. The 'Action Type' dropdown is open, showing 'Collections (Standard process)' selected with a 'PREFERRED' tag. Other options include 'Closing Question', 'Closing Request', 'Clubhouse Rental', 'CO Issued', 'CopyTest_7', and 'Coupon Fee'. The 'Current Step' is 'Closing Request'. The 'Details' section includes 'No Notifications' (unchecked) and 'Subject'.

- If no collection model has been configured, all Collections Action Types will be displayed.

- **ARC**

- Added an **Additional ARC Models** field to the **Association > Settings > ARC > Edit Association Data** form.



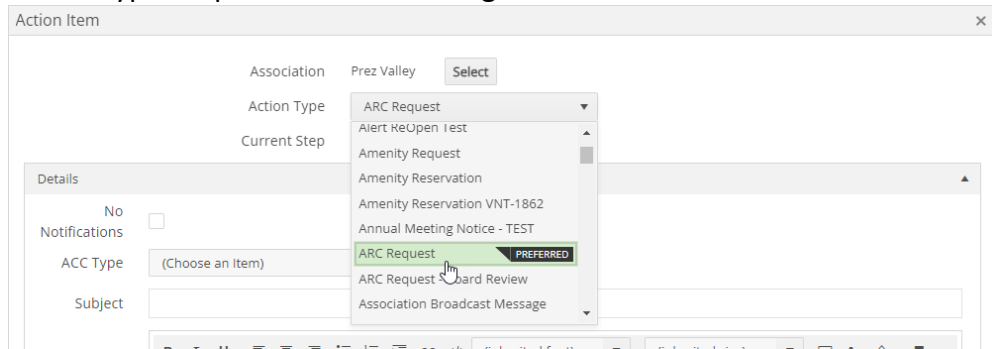
The screenshot shows the 'Edit Association Data' form for 'ARC'. The 'ARC Model' is set to 'ARC Request'. The 'Additional ARC Models' field is highlighted with a red box and contains 'ARC Request - Board Review'. The 'Update' and 'Cancel' buttons are at the bottom right.

- **Note:** Field supports multiple entries.

- Creating New Action Items that are tied to an Association will now only include configured ARC Models as available options in the Action Item's ARC Types.

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- The ARC Model's selected Action Type will now have a Preferred tag on the Action Type dropdown when creating a new Action Item.



- If no ARC Model has been configured, all ARC Request Action Types will be displayed.