Vantaca Release Notes

February 2026 | Updated throughout the month

February 2026
Generated: 02/25/2026

⭐ Highlights This Month

- **CMP:** A redesigned Homeowner Profile consolidates homeowner information into a single tabbed interface, and Call Center enhancements bring critical homeowner details, board member identification, and XN search directly into the call flow.
- **Home and Pay:** Homeowners can now select their preferred payment date when setting up recurring payments through the onboarding modal.
- **Revenue Manager:** A redesigned navigation menu groups features by functional area for a more intuitive experience.
- **IQ:** A new Action Item Insights page delivers advanced filtering, real-time metrics, and detailed analysis of action item workload.
- **Manage Mobile:** Community managers can filter inspections by step type, and the Inspect button now shows a disabled state with a tooltip for view-only users.
- **CMP:** Auto Fee Waiver logic can now be configured to evaluate only late fee rule balances rather than total account balance.

Contents

EXTERNAL

New Features This Month

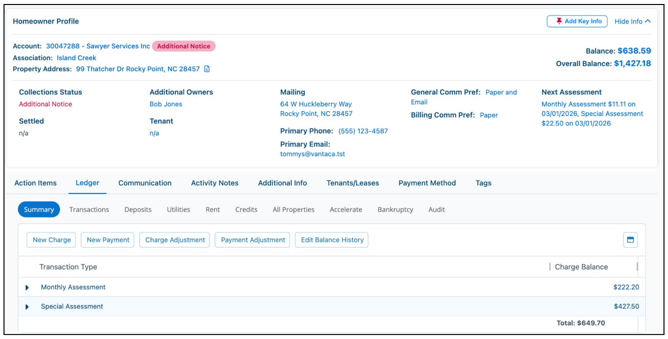
CMP: Homeowner Profile and Call Center Enhancements

Homeowner Profile

Vantaca has consolidated homeowner information into a streamlined tabbed interface, improving efficiency when working with homeowner accounts. Users no longer need to navigate between multiple menu items to access homeowner information. All relevant data is available in a single location with logical groupings, significantly improving user efficiency when managing homeowner accounts.

Simplified Navigation: The following menu items have been removed from the Homeowners menu and consolidated under a single Homeowner Profile option: Action Items, Activity Notes, Additional Info, Contact Info, Ledger, Logins, Payment Method, Tags, Leases, and Tenants.

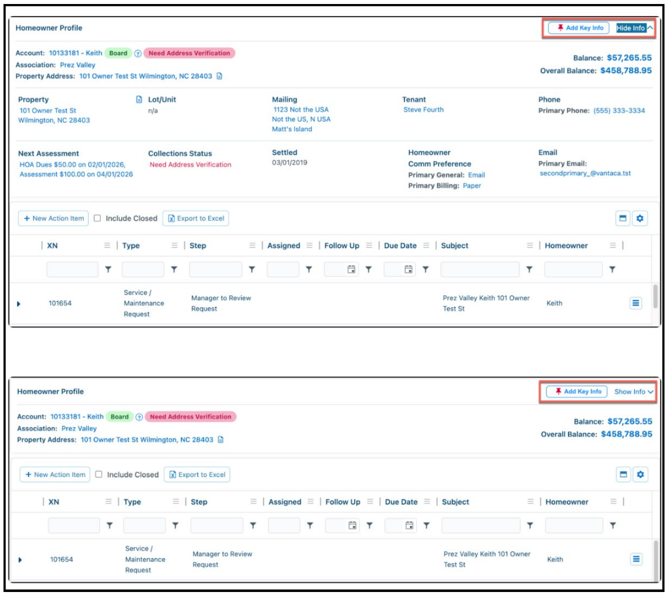
The new Homeowner Profile menu item appears directly under Homeowner List and defaults to the Action Items tab. This menu item is tied to the Homeowner > Homeowner > View permission.



Tabbed Viewing Experience: The Homeowner Account now features organized tabs (most with subtabs) for quick access to information: Action Items; Ledger (with sub-tabs); Communication (with Contact Info and Logins sub-tabs); Activity Notes (with sub-tabs); Additional Info (with sub-tabs); Tenants/Leases (with sub-tabs); Payment Method; Tags. The Communication tab includes sub-tabs for Contact Info (default) and Logins, with an alert icon displayed if no logins exist for the homeowner.

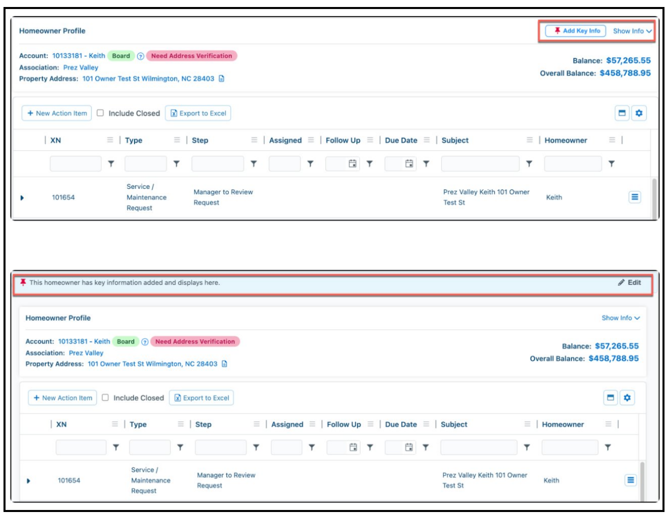
Collapsible Homeowner Account Header

The homeowner account header now includes collapse/expand functionality, giving users control over their screen real estate. When collapsed, the header displays essential at-a-glance details including account number, primary owner name, association nickname, property address, activity notes, property and overall balances, and board/collections indicators. The header retains the user's preference between sessions.



Key Info Field

The homeowner account header now includes a Key Info field for displaying critical information that requires immediate attention, such as POA status, attorney representation, or communication restrictions. When populated, the field appears prominently above the header. The field supports up to 150 characters and is tied to the property, so the information remains visible across all owners including previous owners.



Related Articles:

- Homeowner Profile and Account Navigation
- How to Add and Edit Homeowner Contact Information
- Generate New Portal Logins
- Navigating the Homeowner Ledger
- Navigating the Homeowner Activity Notes Page
- Homeowner Payment Method
- Homeowner List Page Overview

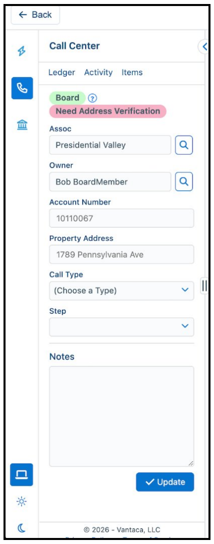
Call Center Enhancements

Call center representatives now have immediate access to critical homeowner information directly in the Call Center panel, including collections status, important notes, and board member identification, improving call quality without navigating away during customer conversations.

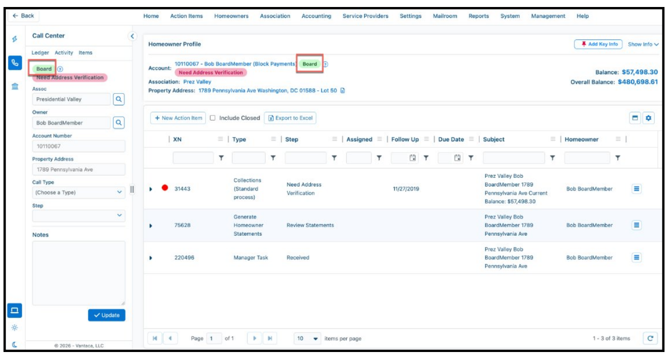
Call Center Action Type Category: A dedicated Call Center action type category now organizes call center-specific workflows. The Call Center interface restricts action item creation to only action types within this category (such as A Homeowner Call, Board Member Call, Vendor Call, or Emergency Call), closing security gaps that previously allowed any action type to be created from the Call Center.

Call Center Role Securities: A new Call Center security group in Role Securities with Add/Update permission controls action item creation from the Call Center. Permission defaults to enabled for roles that have existing Action Item Add/Update permissions.

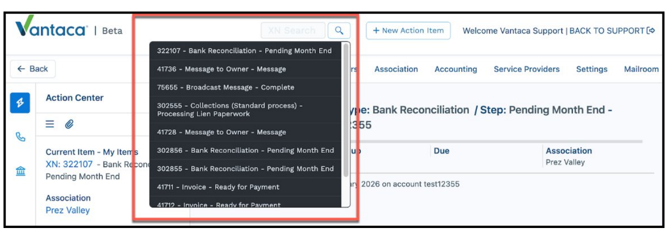
Enhanced Call Center Panel: The Call Center panel now displays Collection Status (when applicable), Key Info (when configured), and a Board Member indicator when a homeowner is selected. The Items field is deprecated, Property field replaced with Account Number and Property Address, Type field renamed to Call Type, and XN search field moved to the application header.



Board Member Identification: A Board indicator displays in the Call Center, Homeowner Header, and Homeowners > Logins page when the homeowner login is linked to an active board role within the start and end dates for the current association. A tooltip shows which homeowner logins are board members and their email addresses.



XN Search (and History) in Header: XN search functionality has been moved from the Call Center panel to the application header next to the New Action Item button. The search field accepts numeric input only (up to 10 digits), performs exact match searches, and navigates directly to the Action Item Details screen. The field displays the last 10 action items searched in dropdown format. Search history persists across sessions.



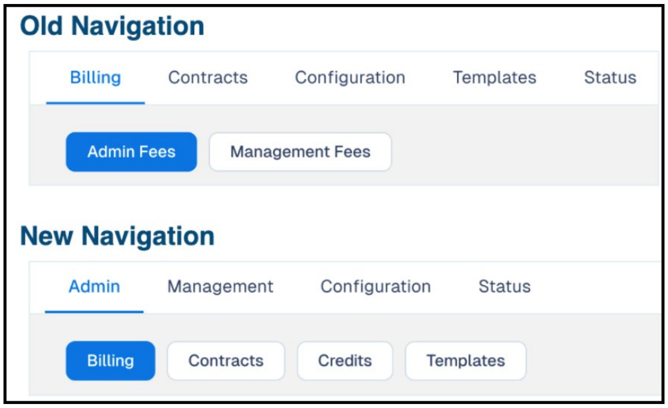
Related Articles:

- [Call Center - Action Items and Phone System Automation]
- [What is an Action Item?]
- [Understanding Roles, Portfolios, & Responsibilities]
- [My Messages, My Action Items, and All Action Items]

Revenue Manager: Enhanced Navigation

The main navigation menu has been reorganized to improve usability and streamline access to key features.

Users will find a more intuitive navigation experience with clearer menu organization. Features are now grouped by functional area, making it easier to locate tools without searching through multiple menu options.

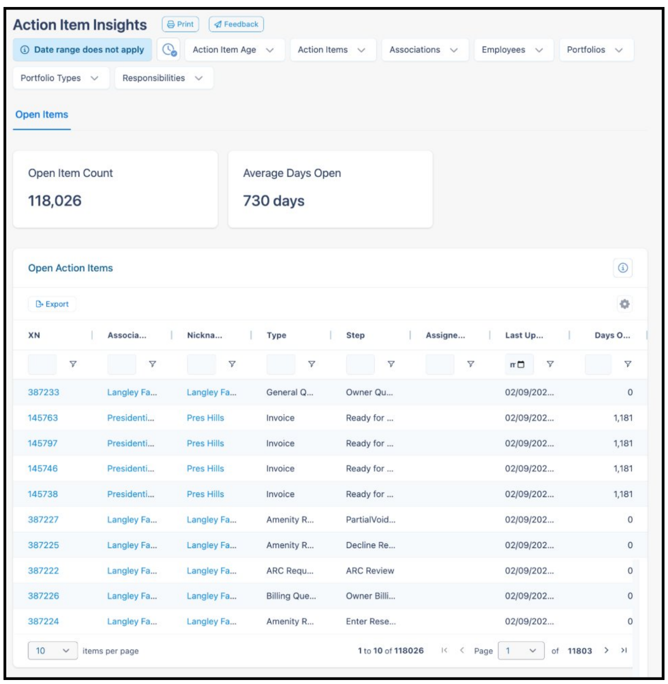


These changes create a more logical menu structure that aligns with common workflows and reduces the time needed to locate frequently used features.

IQ: Action Item Insights

Added a comprehensive Action Item Insights page to Vantaca IQ, providing advanced filtering, real-time metrics, and detailed action item analysis.

Users can now analyze action item workload with powerful filtering tools, identify aging items, track team performance, and make data-driven decisions about workflow management. The comprehensive filtering options allow users to slice action item data by category hierarchy, age, assignment, and association criteria, while summary metrics provide instant visibility into open item counts and average resolution times.



The new page includes:

- **Open Item Count** and **Average Days Open** summary cards displaying key metrics.
- **Open Action Items table** with default columns (XN, Association Name, Nickname, Type, Step, Assigned To, Last Updated, Days Open) and optional columns (Days Since Last Activity, Days in Current Step, Send To Role, Created Date).
- **Advanced Filtering:**
  - Action Item Age filter with two options: "Show items within (Days)" and "Show items older than (Days)", based on Created Date or Last Activity Date.
  - Action Item Categories, Types & Steps filter with hierarchical selection, optional 6-month activity toggle, and search capability.
  - Employee, Association, Portfolio, Portfolio Type, and Responsibility filters.
- **Export** and **Settings** functionality for table customization.
- **Direct XN links** to navigate from the grid to action items in CMP.

Related Articles:
- Vantaca IQ - Action Item Insights (new)

External Improvements ⬆️

Release Date	Details	Customer Impact	Roles Affected	Related Articles
02/26/26 **CMP**	**Strongroom Payment Void Button Control** When using the Strongroom integration with the Avid > Active setting enabled, the Void button is now hidden for Strongroom payments in the Accounting > Bank Register screen. All invoice changes for Strongroom payments must be done within Strongroom, not Vantaca. Note: the Void button remains visible for Strongroom accounts that have Avid > Enable Payments enabled. **Previously:** The Void button displayed for Strongroom payments, risking incorrect void actions in the wrong system. **Now:** The Void button is hidden for Strongroom payments when Avid > Active is enabled.	Prevents errors from voiding Strongroom payments in the wrong system, ensuring proper payment processing workflow.	Accounting Staff AP Team	N/A
02/26/26 **CMP**	**Action Type Categories Consolidation** Deprecated several unused action type categories by migrating their action types into the Standard category. The following categories have been consolidated: Text Message, Junk Email, Service Provider Items, Board Meeting, Support. **Previously:** These categories existed separately, adding clutter to action type configuration. **Now:** Action types from these categories have been migrated into Standard. Existing action items are unaffected.	Simplified action type organization with fewer categories to navigate. Existing action items are unaffected, and all functionality remains the same.	System Admins Workflow Managers	• Action Category Types • What is an Action Item?
02/26/26 **CMP**	**Advanced Fields Preference Persistence** The Show Advanced Fields toggle setting in the action step Rules modal now persists in the database, eliminating the need to toggle it on or off each time. The setting remains active across sessions and applies globally across all action steps. **Previously:** Users had to re-enable Show Advanced Fields each session. **Now:** The preference is saved and persists even after logging out.	Saves time by not having to repeatedly enable advanced fields when configuring action step rules. The setting persists even after logging out.	System Admins Workflow Managers	• Action Category Types • Action Type Rules
02/26/26 **CMP**	**Service Provider Field Restrictions for Vantaca Vendor Users** Management companies can no longer edit the following vendor fields when the vendor is using Vantaca Vendor portal: Company Name, DBA, Business Address, Tax ID, Preferred Pay Type, Primary Contact Info, Banking Information. These fields are now grayed out with a message: "This vendor manages certain fields directly in Vantaca Vendor." Management companies can still edit: Preferred Provider status, Hold Payment, Compliance settings, Insurance Information, 1099 settings, Provider Type, and can add additional contacts. **Previously:** Management companies could edit vendor-managed fields, causing potential data conflicts. **Now:** Vendor-controlled fields are locked, preventing data conflicts.	Prevents data conflicts between vendor-managed and management company-managed information, keeping vendor banking and contact details accurate and controlled by the vendor.	Accounting Staff AP Team Property Managers	• How to Set Up or Edit a Service Provider
		More intuitive defaults reduce setup time for new action types and email templates. Simplified	System Admins	• Action Category Types

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02/26/26 **CMP**	**Action Type Requirements Improvements** Enhanced action item creation with improved defaults and streamlined report generation: • Mail Format Default: New action types now default to "Primary Mailing Address Only" • Email Reply Method Default: New email templates default to "Reply Above" • Rules Modal Simplification: Removed redundant PDF checkbox from Reports tab. Selecting an order number automatically indicates PDF generation • Excel Report Remediation: Identified and corrected reports that were generating as Excel instead of PDF **Previously:** New action types and templates required manual configuration of these defaults. **Now:** More intuitive defaults reduce setup time and the simplified Rules modal prevents PDF generation errors.	Rules modal prevents PDF generation errors.	Workflow Managers	• Action Type Rules • Email Templates 101
02/26/26 **CMP**	**Action Type Requirements Migration and Consolidation** Simplified action type requirements from five options to two: • **Require Association:** Requires you to select an association, but allows you to optionally select an individual property within that association • **Require Property:** Requires you to select both an association and a specific property Existing requirements will automatically migrate to the new structure. **Previously:** Action type requirements had five options, creating configuration complexity. **Now:** Two clear options streamline configuration. All existing action types continue to function as before.	Streamlines action type configuration with clearer options. All existing action types continue to function as before.	System Admins	• Action Item Configuration: Overview • Adding a Step to an Action Type
Home and Pay 02/24/26	**Payment Date Selection in Recurring Payments Onboarding Modal** When setting up recurring payments through the onboarding modal, homeowners can now select their preferred payment date during enrollment. **Previously:** The onboarding modal did not provide an option to choose a payment date during recurring payment setup. **Now:** A payment date selection step is included in the onboarding modal, allowing homeowners to specify their preferred date before completing enrollment.	Homeowners can set their preferred recurring payment date upfront during enrollment, reducing the need to modify payment settings after setup.	Homeowners	• Home Portal Payments Onboarding
Manage Mobile 02/23/26	**Filter Inspections by Step in the Manage App** Community managers can now filter inspections by step type within an association, making it easier to prioritize workflow based on where inspections are in the process. **Previously:** No step-based filtering was available for inspections in the Manage app. **Now:** Inspections can be filtered by step type within an association.	Managers can quickly sort and prioritize inspections by step, reducing time spent scrolling through long lists and improving efficiency in the field.	Community Managers	• Vantaca Manage App: Inspections
Manage Mobile 02/23/26	**Inspect Button Disabled for Users Without Edit Permissions** Users with view-only access to an association now see the Inspect button in a disabled (grayed-out) state instead of receiving an error that logged them out of the app. A tooltip displays to explain why the button is unavailable and how to resolve it.	Users with view-only access can continue to view association data without being unexpectedly logged out. The tooltip helps them understand what permission is needed, reducing confusion and support requests.	Community Managers System Admins	• Vantaca Manage App: Overview and Setup • Vantaca Manage App: Inspections

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	Previously: View-only users encountered an error when tapping Inspect, which logged them out of the app. **Now:** The Inspect button appears grayed out with an explanatory tooltip for users without edit permissions.			
Manage Mobile 02/23/26	**CCR Description No Longer Required When None Are Configured** When creating a violation in the Manage app, the CCR Description field is now only required if descriptions are configured for the selected CCR item. Users are no longer blocked from saving a violation when their management company's CCR setup does not include descriptions for certain items. **Previously:** The CCR Description field was required even when no descriptions were configured, blocking violation creation. **Now:** The field is only required when descriptions are configured for the selected CCR item.	Users can complete violations without being blocked when their CCR setup does not include descriptions for certain items, eliminating a common workflow blocker.	Community Managers	• Vantaca Manage App: Violations
IQ 02/17/26	**Live Open Item Count Added to Employee Listing** The Employee Listing in Vantaca IQ now displays a live Open Items count column showing the total number of open action items each employee can access. **Previously:** The Employee Listing did not include a live open item count. **Now:** A live Open Items count column is visible on the Employee Listing page, reflecting the same count shown on each employee's individual dashboard.	Managers and executives gain immediate visibility into employee workload directly from the Employee Listing page without navigating to individual employee dashboards.	System Admins People Managers Executives	• Vantaca IQ - Employees Dashboard • Vantaca IQ: Understanding Live and Scheduled Data
CMP 02/12/26	**Auto Fee Waiver Balance Calculation Options** A new Auto-Waive Balance setting has been added to Association > Settings > Accounting (Auto-Waive Fees) with two options: Total Balance (default) and Late Fee Rule. When Late Fee Rule is selected, Vantaca evaluates only the charges included in the Balance Includes field of the applicable late fee rule to determine if a late fee should be auto-waived. **Previously:** Auto-waiver logic evaluated the homeowner's total account balance. **Now:** Associations can choose to evaluate only the balance defined in the late fee rule, enabling more targeted waiver logic.	Associations can configure more precise auto-waiver logic based on late fee rule configuration rather than total account balance, preventing incorrect fee waivers when homeowners have other outstanding balances unrelated to the late fee being evaluated.	Accounting Staff System Admins	• Auto Fee Waivers in Vantaca • How to Set Up Late Fee and Interest Rules
CMP 02/12/26	**Action Type Rules Simplified** The following fields have been removed from action type configuration: Min. Balance to Move On and the AND/OR field above it, and Statement Product Code. The XN Rules Improvements feature flag has been deprecated and this functionality is now standard for all users. **Previously:** Action type configuration included Min. Balance to Move On, the AND/OR toggle, and Statement Product Code fields. **Now:** These fields have been removed; collections workflows advance based on duration, decision types, and other criteria.	The action type configuration interface is cleaner and easier to navigate. Collections workflows now advance based on duration, decision types, and other criteria without the Min Balance to Move On field.	System Admins Collections Managers	• Action Type Rules • Overview of Collections in Vantaca
Revenue Manager 02/10/26	**Pending Charges Export Credit Information** Enhanced the Pending Charges Detail export to include credit information in the spreadsheet. Credits now appear in	When exporting pending charges, the file now includes complete financial information	Accounting Staff Management	• Revenue Manager: Billing

Release Date	Details	Customer Impact	Roles Affected	Related Articles
	the exported data, matching what displays in the Pending Charges Detail screen. **Previously:** The Pending Charges Detail export did not include credit information. **Now:** Credits appear in the exported spreadsheet, matching the on-screen data.	with both charges and credits, providing accurate totals for reconciliation and review before posting invoices.	Company Billing Staff	
IQ **02/10/26**	**Employee List Column Update** Updated the Vantaca IQ Employee Listing page to rename the "Open Items" column to "Assigned Open Items" with a clarified tooltip. The column now clearly indicates it displays only action items directly assigned to each employee via the "Assigned To" field. **Previously:** The column was labeled "Open Items," which did not clarify scope. **Now:** The column is labeled "Assigned Open Items" with a tooltip explaining it reflects directly assigned items only.	The renamed column provides clearer understanding of what data is displayed, allowing users to distinguish between directly assigned items and those accessible through role-based responsibilities.	System Admins Managers IQ Users	• Vantaca IQ - Employees Dashboard
Home and Pay **02/06/26**	**SMS Enrollment Modal Dismissal Options** Added a No Thanks button and Close (X) icon to SMS enrollment steps in the recurring payments onboarding modal to provide clearer dismissal options. **Previously:** The SMS enrollment modal lacked clear dismissal controls. **Now:** A No Thanks button and Close (X) icon are available, both triggering the standard 30-day snooze behavior.	Users can now dismiss the SMS enrollment modal using the No Thanks button or Close (X) icon, both triggering the standard 30-day snooze behavior.	Homeowners	• Home Portal Payments Onboarding
Revenue Manager **02/05/26**	**Management Fee Invoice Description** Enhanced Revenue Manager Management Fee invoices to include contract-specific charge descriptions. When posting management charges, the invoice now displays the custom Description field configured in the contract's Charge Setup rather than defaulting to "Management Fees." **Previously:** Management fee invoices defaulted to "Management Fees" as the description. **Now:** Invoices display the custom description configured in each contract's Charge Setup.	Management fee invoices now show meaningful charge descriptions as configured in each contract's charge setup, providing clear billing transparency to associations.	Accounting Staff Management Company Billing Staff	• Revenue Manager: Contracts and Templates • Revenue Manager: Billing

External Corrections 🔧

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02/26/26 **CMP**	**Strongroom Invoice Check Number Display** Corrected an issue where the Check No column displayed blank for Strongroom (Avid) consolidated check payments in the Service Provider > Invoices screen, even though check numbers existed in the system. The Check No column now properly displays check numbers for all paid invoices. Additionally, the invoice balance now correctly shows $0 for fully paid invoices in the Bank Register drilldown. **Previously:** The Check No column displayed blank for Strongroom consolidated check payments. **Now:** Check numbers display correctly and invoice balances show $0 for fully paid invoices.	Improved visibility into payment details for Strongroom payments, making it easier to track and reconcile invoices paid via consolidated checks.	Accounting Staff AP Team	• Viewing Invoices - Using the Service Providers Invoices Page
	Association Calendar Event Time Zone Correction Corrected an issue where Association Calendar Events were	Calendar events now create action items on the correct	All users creating	

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02/26/26 **CMP**	creating action items on incorrect dates or times. The calendar event creation process now properly handles time zones. As part of this fix, a Time Zone field now appears in the event creation interface, which defaults to the time zone set in Association > Settings for that association. **Previously:** Calendar events could create action items on incorrect dates or times due to time zone handling issues. **Now:** Events create action items on the correct dates and times. Users can see and verify the time zone being used for each event.	dates and times. Users can see and verify the time zone being used for each event.	Association Calendar events	• Association Calendar Instructions
02/26/26 **CMP**	**Action Steps Duplication Prevention** Corrected an issue where action steps were intermittently duplicating 2-5 times when clicking Update on action items. The stepping process now correctly advances through each step only once as designed. **Previously:** Action steps could duplicate 2-5 times when clicking Update, cluttering action item history. **Now:** Action items step through their configured workflow exactly as intended, without duplicate steps.	Action items now step through their configured workflow exactly as intended, without duplicate steps cluttering the action item history and notes.	All Action Item Users	• What is an Action Item?
02/26/26 **CMP**	**Action Item Update Button Validation** Corrected an issue where line breaks in action step next-step instructions caused form validation errors, making the Update button unresponsive when editing action items. The system now properly handles formatted text in next-step information without triggering validation failures. **Previously:** Line breaks in next-step instructions caused the Update button to become unresponsive. **Now:** Update buttons respond consistently regardless of formatting in next-step instructions.	Action item Update buttons now respond consistently regardless of formatting in next-step instructions. Users can successfully update action items without encountering unresponsive buttons.	All Action Item Users	• What is an Action Item?
Integrations 02/25/26	**AVID Consolidated Checks Display Service Provider's Preferred Name** Corrected an issue where AVID consolidated checks (PayType -24) were printing the service provider's legal name (ProviderName) instead of their preferred name. The system now follows the same name priority logic: CheckName first, then DBA (Doing Business As), then ProviderName. **Previously:** AVID consolidated checks printed the service provider's legal name instead of their preferred name. **Now:** AVID consolidated checks display the correct preferred name, consistent with non-consolidated checks.	AVID consolidated check payments now display the correct service provider name, consistent with how non-consolidated checks and other areas of the platform display provider names.	Accounting Staff AP Team	• Setting Up Service Provider Payment Methods
Manage Mobile 02/23/26	**Ending an Inspection No Longer Creates Duplicate Records** Corrected an issue where ending a single inspection in the Manage app caused multiple duplicate inspection records to appear in Vantaca, all created within seconds of each other. **Previously:** Ending an inspection could create duplicate records in Vantaca. **Now:** Ending an inspection correctly creates a single record.	Ending an inspection now correctly creates a single record in Vantaca, eliminating the need to manually clean up duplicate inspections on the desktop.	Community Managers	• Vantaca Manage App: Inspections
Manage Mobile 02/23/26	**Violations No Longer Auto-Step to Inactive Steps** Corrected an issue where violations using auto-step logic could advance to inactive action steps, causing action items to land on steps that were no longer part of the active workflow.	Violations stepped through the Manage app now advance only to active, configured steps, preventing action items from	Community Managers	• Vantaca Manage App: Violations

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	Previously: Auto-step logic could advance violations to inactive steps. **Now:** Violations advance only to active, configured steps.	incorrectly landing on removed or inactive steps.		
Manage Mobile 02/19/26	**Follow Up Date Auto-Populates When Stepping Violations in iOS** Corrected an issue where the Follow Up Date did not auto-populate when stepping a violation in the Vantaca Manage iOS app. The app now uses the duration configured on the action step to calculate and populate the Follow Up Date, consistent with behavior in Vantaca.net. **Previously:** The Follow Up Date did not auto-populate when stepping violations in iOS. **Now:** The Follow Up Date is calculated from the configured action step duration, matching Vantaca.net behavior.	Violations stepped in the iOS app now correctly populate the Follow Up Date based on the configured action step duration, ensuring automated step progression and merge tag functionality work as intended.	Field Inspectors Violation Managers	• Vantaca Manage App: Violations • Vantaca Manage App: Inspections
Manage Mobile 02/19/26	**Whitespace-Only CCR Description Triggers Validation Error in iOS** Corrected an issue where entering only whitespace characters in the CCR Description field when adding a violation allowed the user to tap Add without any error or feedback. The field now trims whitespace and displays the required field validation error. **Previously:** Entering only whitespace in the CCR Description field allowed submission without error. **Now:** The field validates and displays an error when only whitespace is entered.	Users who enter only spaces in the CCR Description field now see a clear validation message prompting them to enter a valid description, preventing incomplete violations from being silently discarded.	Field Inspectors Violation Managers	• Vantaca Manage App: Violations
CMP 02/13/26	**Action Item Update Button Responsiveness** Corrected race condition issues that caused action item Update buttons to become unresponsive. The fix includes additional validation protection when updating action items and restores the Help > Vantaca Support menu link functionality. **Previously:** Race conditions caused Update buttons on action items to become unresponsive, and the Help menu support link was non-functional. **Now:** Update buttons respond reliably and the Help menu support link works correctly.	Update buttons on action item detail pages now respond reliably when making changes to action items. Users can also successfully access Vantaca support resources through the Help menu.	All CMP users working with Action Items	N/A
CMP 02/12/26	**Reply and Reply All Navigation Fixed** Corrected an issue where clicking Reply or Reply All from the Messages tab within an Invoice action item redirected users to the Dashboard instead of opening a message window. **Previously:** Clicking Reply or Reply All from Invoice action item Messages tab redirected to the Dashboard. **Now:** Reply and Reply All open a message window as expected.	Users can now reply to messages directly from the Messages tab within Invoice action items.	All users who reply to messages on Invoice action items	• What is an Action Item?

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CMP 02/12/26	**Scheduled Events Restricted for Inactive Associations** Scheduled events on the Association Calendar no longer execute for associations that are not live. The system excludes associations where the Live checkbox is unchecked or the status is "Onboarding" or "Not Managed." **Previously:** Scheduled events could execute for inactive or onboarding associations. **Now:** Scheduled events only run for associations with live status.	Scheduled events will not execute for associations that are not actively managed, preventing errors and unwanted action items during onboarding.	System Admins Association Managers	• Association Calendar Instructions • Scheduling Broadcast Messages through the Association Calendar
CMP 02/12/26	**Copy Action Item Notification Suppression Corrected** Corrected the notification suppression logic when copying action items. When Copy Previous Notes and Attachments is selected, documents regenerate but external communications never resend. When No Notifications is selected for the step during copy, that setting applies only to the selected step. **Previously:** Notification suppression logic when copying action items did not behave as expected for both options. **Now:** Each option applies its suppression logic correctly and independently.	External communications will not accidentally resend when copying action items with previous notes and attachments, while the No Notifications setting correctly applies only to the step selected during the copy process.	Users who copy action items	• What is an Action Item?
CMP 02/12/26	**Action Item Update Button Validation** Resolved a race condition that caused form validation to fail when updating action items, resulting in an unresponsive Update button and "ReferenceError: validator is not defined" error. **Previously:** A race condition caused a "validator is not defined" error and unresponsive Update button. **Now:** The Update button functions reliably without validation errors.	The Update button on action items now functions reliably without encountering validation errors.	Users who update action items	• What is an Action Item?
CMP 02/12/26	**AVID Consolidated Check Invoice Images in Report** The Invoice Image Report now includes invoice images for AVID consolidated checks by retrieving parent consolidated check records through child ActionItemID associations. **Previously:** Invoice Image Reports did not include images for AVID consolidated checks. **Now:** All AVID payment transactions are included in Invoice Image Reports.	Invoice Image Reports include all AVID payment transactions. Voiding operations function correctly with proper user prompts, and all linked invoices automatically return to Ready for Payment status for reprocessing.	Accounting Staff	• Types of Reports
CMP 02/12/26	**Service Provider Action Item Stepping** Fixed an error that was preventing stepping of action items from the Service Provider page. **Previously:** An error prevented stepping action items from the Service Provider > Action Items page. **Now:** Action items can be stepped directly from the Service Provider page without error.	Users can now successfully step action items directly from the Service Provider > Action Items page.	Service Provider Coordinators	• What is an Action Item?
IQ 02/10/26	**Action Item Region-Based Filtering** Corrected region-based responsibility check for action item visibility in Vantaca IQ metrics. The system now properly validates that employees can only see action items where their specific role is assigned to the association's region. **Previously:** Employees with the same role type but different regional assignments could see each other's action items.	Action item counts in Vantaca IQ now accurately reflect regional assignments. Supervisors and managers with region-specific responsibilities will only see action items for associations within their assigned regions.	System Admins Managers Regional Supervisors IQ Users	• Vantaca IQ - Action Item Insights

Release Date	Details	Customer Impact	Roles Affected	Related Articles
	Now: Action item visibility is correctly scoped to each employee's regional assignment.			
Revenue Manager 02/05/26	**Accrual Account Payment Recognition** Updated percentage-based management fee calculations to properly recognize only received payments for associations using Accrual or Modified Accrual accounting methods, excluding pending ledger transactions. **Previously:** Percentage-based management fee calculations could include pending ledger transactions for Accrual accounts. **Now:** Only actual received payments are included in these calculations.	Percentage-based management fee calculations for Accrual and Modified Accrual accounts now reflect only actual received payments, ensuring accurate fee generation that matches true cash flow rather than accrued amounts.	Accounting Staff Management Company Billing Staff	• Revenue Manager: Contracts and Templates • Revenue Manager: Billing