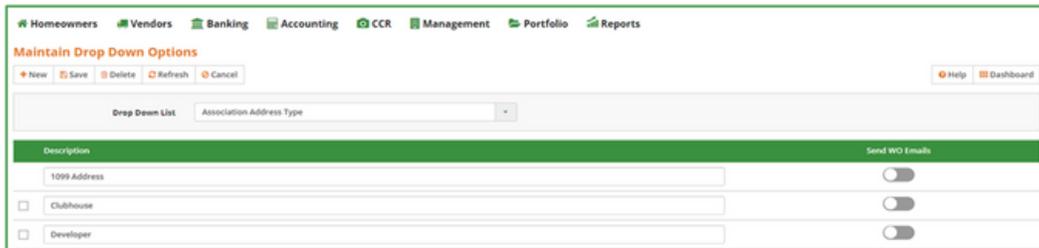


WORK ORDERS QUICK REFERENCE GUIDE

Drop Down Options



The screenshot shows a web application interface for maintaining drop-down options. At the top, there are navigation tabs: Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, and Reports. Below the tabs is the title 'Maintain Drop Down Options' and a toolbar with buttons for New, Save, Delete, Refresh, and Cancel. A 'Drop Down List' dropdown menu is set to 'Association Address Type'. Below this is a table with columns for 'Description' and 'Send WO Emails'. The table contains three rows: '1099 Address', 'Clubhouse', and 'Developer', each with a checkbox and a toggle switch.

Select System/Drop Down Options

- o Association Address Type
- o Work Order Status
- o Work Order Type

Email Templates



The screenshot shows the 'Edit Email Template' web interface. It has a toolbar with Save, Refresh, and Cancel buttons. The interface is divided into sections: 'Email Template:' with a text area containing 'eStatement'; 'Attachments:' with a list of items including 'New Action Item Note - Mgmt. Co.', 'Past Due Action Item List', 'Weekly Manager Update', and 'Vendor Templates'; 'Subject:' with a list of subject lines like 'Insurance Expired - Past Expiration Notice'; and 'Body Text:' with a list of body text templates. A red box highlights the 'Work Order Templates' section, which includes options like 'Work Order Completed', 'Work Order Created - For Homeowner', 'Work Order Created - For Manager', 'Work Order Dispatched - Homeowner', 'Work Order Dispatched - Vendor', 'Work Order Note Notification', 'Work Order Re-Opened', 'Work Order Status Change', and 'Work Order Vendor Reassignment'.

Select Tools/Email Templates



WORK ORDERS QUICK REFERENCE GUIDE

Common Areas

The screenshot shows the 'Additional Addresses' screen for the 'Test Training Association'. At the top, there are navigation buttons: New, Save, Delete, Excel, Refresh, and Cancel. Below this is a table of addresses with columns for Name, Address, Email, and Phone. The table includes entries for Clubhouse, Test Association Pool, *Test Training Association, and Tennis Pro Shop. Below the table is a form for adding a new address, with fields for Address Type, Name, Address, City/State/Zip, Home Phone, Work Phone, Village, Lot, Mobile Phone, Email, and Phone. A red box highlights the 'Common Area' toggle switch, which is currently turned on. The bottom navigation bar has the 'Addr' tab highlighted.

- Select Setup/Association Setup, Select association, click on Addr tab
- o Add each banking common area to the association's Additional Addresses screen
 - o Toggle on the Common Area button

Work Order List Screen

The screenshot shows the 'Work Order List' screen. At the top, there are navigation buttons: New, Delete, Completed, Reopen, Print, Refresh, and Cancel. Below this is a search and filter section with dropdowns for Vendor, Status, Work Location, and WO Type. Below the search and filter section is a table of work orders with columns for WO #, Created, Printed / Emailed, Due, Type / Description, Vendor, Work Location, and Status. A red box highlights the 'Common Area' toggle switch, which is currently turned on.

Select Vendors/Work Orders

- o View existing work orders in a single or All Association view
- o Check the box next to the WO# to complete or reopen the work order
- o Click on the WO# to view a work order or click New to enter a new work order



WORK ORDERS QUICK REFERENCE GUIDE

Creating a New Word Order

Work Order

Association: *Test Training Association

Work Order #:

Type: Status:

Description: *TEST - Pipe Leaking

Estimate Total: Due Date: Follow Up Date:

Work Location

Name: Select Homeowner or Common Area

Address:

City, State, Zip:

CONTACTS

Contact (Address Type)	Email	Phone
Test Association Pool (Pool)	<input type="text" value="test@testemail.com"/>	<input type="text"/>

Work Assigned To

Vendor:

Check Name:

Vendor Contact	Phone	Cell	Fax	Email
Polly Brown	(404) 556-7788			ppool@test.com

Attachments Files over 50 MB will not be uploaded.

Date	File Name	Size
<input type="checkbox"/> 10/13/2023 09:22:48 PM	pipe (1).jpg	67 KB

Drop files to attach or click [Browse](#)

Work Order Notes

Date	Public	Email	Note
10/13/2023	<input checked="" type="checkbox"/>	<input type="checkbox"/> Work Location <input type="checkbox"/> Vendor	<input type="text" value="Pipe near entrance is leaking."/>

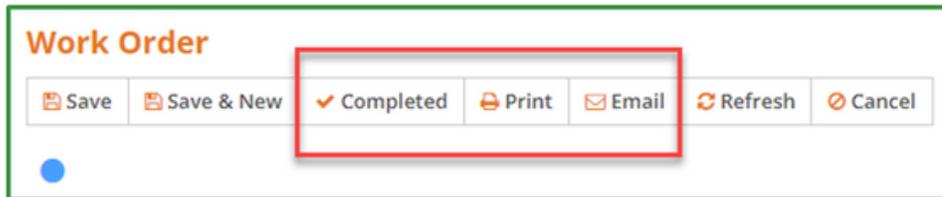
30 / 7000

- Work Order # will automatically populate after clicking Save
- Description will automatically populate in the Subject line when Emailing the work order
- Work Location can be linked to a Homeowner or Common Area
- The system will trigger the Unlinked Vendor flag if the Vendor has no contact information listed
- Work Order Notes with the Public box checked will appear on the Work Order List report

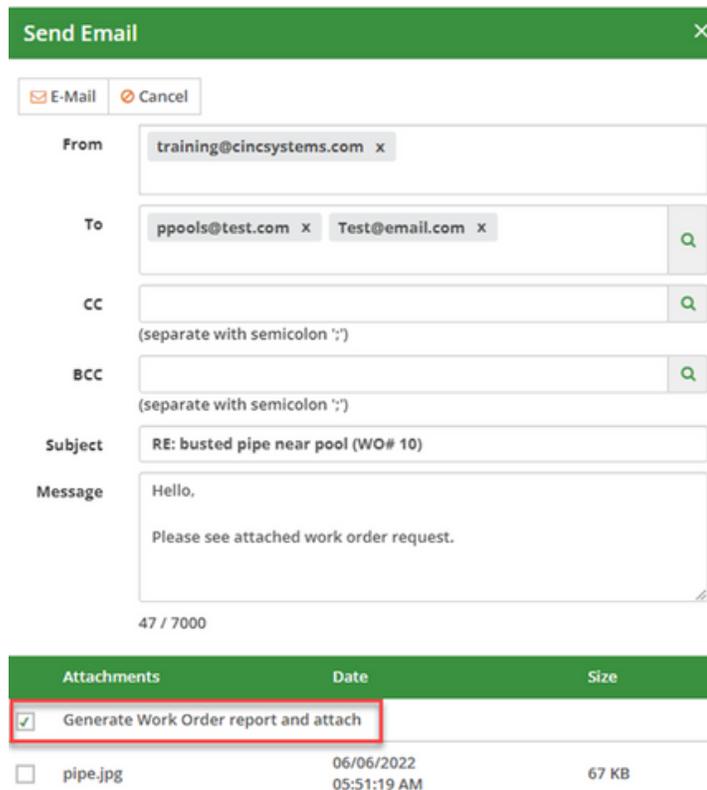


WORK ORDERS QUICK REFERENCE GUIDE

Completed/Print/Email



- These are made available after clicking Save
- Clicking Print will create a pdf of the work order under Recent Reports titled Work Order
- Click Email to email the Work Order Report and/or attachments
 - o The User's email address will populate in the From field - replies will go to your inbox
 - o The Work Location and Vendor email addresses will populate in the To field
 - o You must include a message and check the Generate Work Order report and attach box



The 'Send Email' dialog box shows the following fields:

- From:** training@cincsystems.com x
- To:** ppools@test.com x, Test@email.com x
- CC:** (separate with semicolon ;)
- BCC:** (separate with semicolon ;)
- Subject:** RE: busted pipe near pool (WO# 10)
- Message:** Hello, Please see attached work order request.

Character count: 47 / 7000

Attachments	Date	Size
<input checked="" type="checkbox"/> Generate Work Order report and attach		
<input type="checkbox"/> pipe.jpg	06/06/2022 05:51:19 AM	67 KB



WORK ORDERS QUICK REFERENCE GUIDE

Complete Work Order

Status: Closed

Email Work Location Vendor

Public

Note: Work completed.

15 / 7000

NOTE: This Note may be visible to either the Homeowner or Vendor. Please use appropriate language.

Vendor Rating (Optional)

Global Average Rating: ★★★★★ (7 rating)

Your Average Rating: ☆☆☆☆☆ (0 rating)

Your Last Rating: ☆☆☆☆☆

New Rating: ☆☆☆☆☆

Rating Note (Optional)

Save Cancel

- Click Completed to close the work order
- o The Email Work Location, Vendor and Public boxes default as checked – uncheck if needed



WORK ORDERS QUICK REFERENCE GUIDE

Link Work Order to Invoice

The screenshot shows the 'Assign Invoice' screen. At the top, there are navigation tabs: Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, and Reports. Below the tabs are buttons for Save, Refresh, Cancel, Help, and Dashboard. The main content area includes a search bar for '*Test Training Association'. The 'Batch' field is set to '01/18/2022 Batch # 6 (4) - Test User' with an 'Unassign' button next to it. The 'Recurring' field is empty. The 'Invoice #' field is empty. The 'Status' is 'Pending Approval'. The 'Pay To' field is empty. The 'Address' field is empty. The 'City', 'State', and 'Zip' fields are empty. The 'Memo' field is empty. The 'Account' is 'TestBank - OP - 1234' and the 'Pay By' is 'Check'. The 'Date' is '10/05/2023' and the 'Due' is empty. The 'Total' is '\$0.00'. A red box highlights the 'WO #' field, which is currently empty. A green box highlights the 'Unassign' button.

·Assign Invoice screen – Select Vendors/Assign Invoices

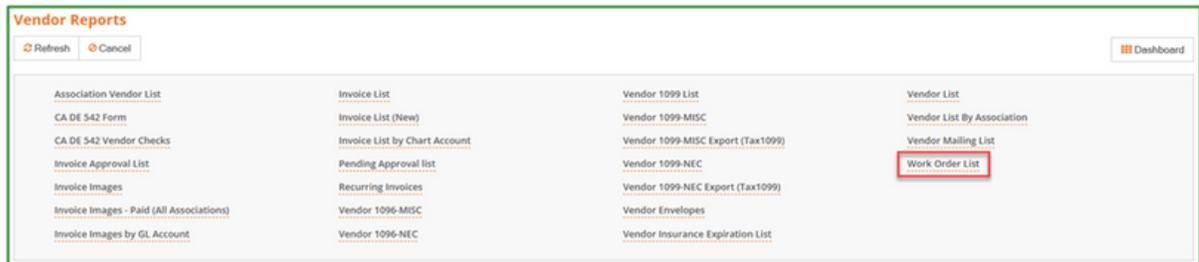
The screenshot shows the 'Invoice' screen. At the top, there are navigation tabs: Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, and Reports. Below the tabs are buttons for Save, Save & New, Refresh, Cancel, and Dashboard. The main content area includes a search bar for '*Test Training Association'. The 'Invoice #' field is empty. The 'Vendor Account #' field is empty. The 'Status' is 'Pending Approval'. The 'Pay To' field is empty. The 'Invoice Date' is '10/05/2023' and the 'Due Date' is empty. A red box highlights the 'WO #' field, which is currently empty.

·Invoice screen – Select Vendors/Invoices then click New



WORK ORDERS QUICK REFERENCE GUIDE

Work Order Report



Select Reports/Vendor Reports click Work Order List

- o Create Date – Day Work Order entered in CINC
- o Due Date – Work Order with Due Date set
- o Nex Reminder Date – Work Order with Follow up Date set
- o Issued Date – Day Work Order was Printed / Emailed
- o Completed Date – Day Work Order was closed/completed

