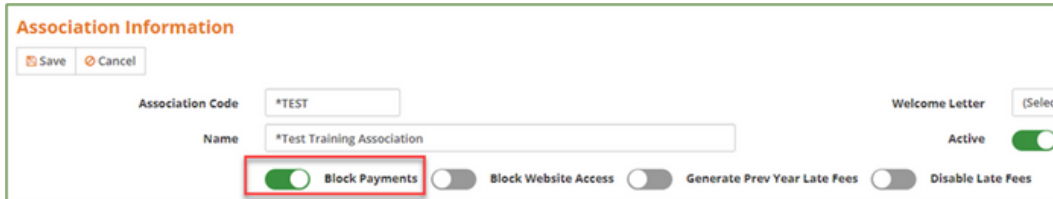


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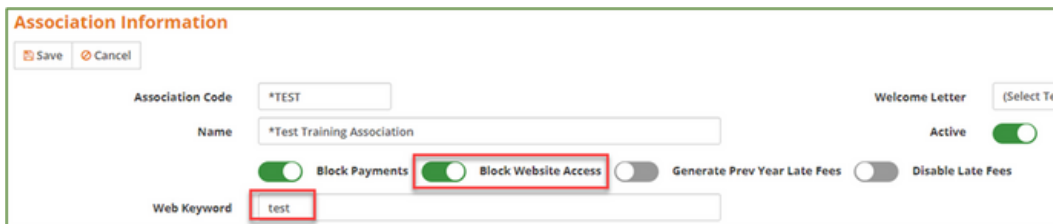
Block Payments



The screenshot shows the 'Association Information' form. At the top left are 'Save' and 'Cancel' buttons. The 'Association Code' field contains '*TEST'. The 'Name' field contains '*Test Training Association'. On the right, there is a 'Welcome Letter' dropdown set to '(Select...)' and an 'Active' toggle switch that is turned on. At the bottom, there are four toggle switches: 'Block Payments' (highlighted with a red box and turned on), 'Block Website Access' (turned off), 'Generate Prev Year Late Fees' (turned off), and 'Disable Late Fees' (turned off).

- Select Setup/Association Setup select association
- o Payments must be blocked on the last business day of the month by 2:30pm EST.
- o Blocking payments will NOT prevent a deposit from being made if the bank account is still open.
- o Credit card payments that initiate one day and are not deposited until days later will not be affected by the block

Block Website Access



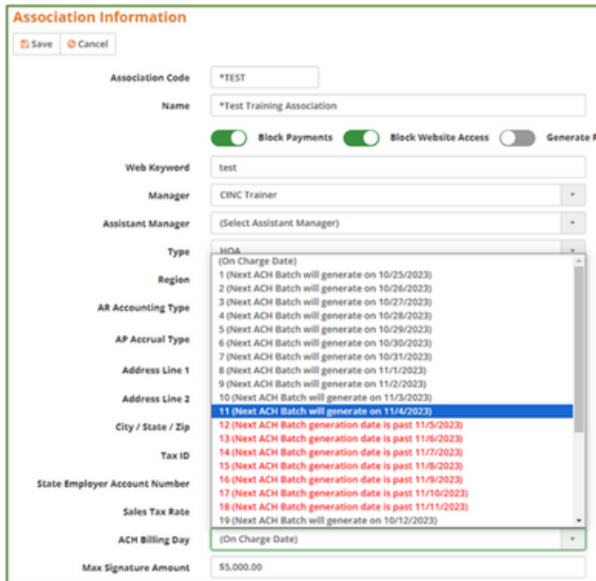
This screenshot is similar to the one above but includes an additional field. The 'Web Keyword' field at the bottom left contains the text 'test' and is highlighted with a red box. The 'Block Website Access' toggle switch is also highlighted with a red box and is turned on. All other fields and toggles remain the same as in the previous screenshot.

- Select Setup/Association Setup select association
- o Block Website Access prevents homeowners from logging into their WebAxis account
- Remove the Web Keyword to prevent the association website from appearing in case homeowners have saved the URL



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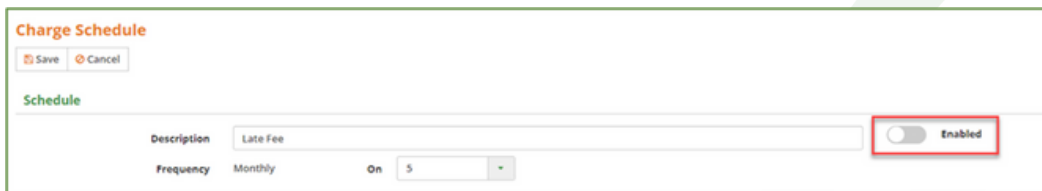
Block ACH Payments



The screenshot shows the 'Association Information' form. At the top, there are 'Save' and 'Cancel' buttons. The form includes fields for 'Association Code' (set to *TEST), 'Name' (*Test Training Association), 'Web Keyword' (test), 'Manager' (CINC Trainer), 'Assistant Manager' (Select Assistant Manager), 'Type' (HOA), 'Region' (On Charge Date), 'AR Accounting Type' (1 (Next ACH Batch will generate on 10/25/2023)), 'AP Accrual Type' (2 (Next ACH Batch will generate on 10/26/2023)), 'Address Line 1' (3 (Next ACH Batch will generate on 10/27/2023)), 'Address Line 2' (4 (Next ACH Batch will generate on 10/28/2023)), 'City / State / Zip' (5 (Next ACH Batch will generate on 10/29/2023)), 'Tax ID' (6 (Next ACH Batch will generate on 10/30/2023)), 'State Employer Account Number' (7 (Next ACH Batch will generate on 10/31/2023)), 'Sales Tax Rate' (8 (Next ACH Batch will generate on 11/1/2023)), 'ACH Billing Day' (9 (Next ACH Batch will generate on 11/2/2023)), and 'Max Signature Amount' (\$5,000.00). A dropdown menu is open for 'Type', showing a list of options. The 'Block Payments' toggle is turned ON.

- Select Setup/Association Setup select association scroll to ACH Billing Day
 - o Change ACH Billing Day to a future date to prevent ACH Payments from generating
 - o On Homeowner Information - Remove Homeowner bank account information & change billing type
 - o Address ACH Batch - Remove ACH payment from homeowner's ledger or Void ACH as Bank Adjustment

Disable Charge Schedule



The screenshot shows the 'Charge Schedule' form. At the top, there are 'Save' and 'Cancel' buttons. The form includes a 'Schedule' section with a 'Description' field (Late Fee) and a 'Frequency' field (Monthly). A toggle switch is visible, labeled 'Enabled', which is currently turned OFF.

- Select Homeowners/Post Charges



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Invoice Settings

- Select Setup/Association Setup select association and click on the Invoicing tab
 - o Change the Total Board Approvals Required to zero to stop the board from receiving invoice approval notifications
 - o Void pending invoices if needed

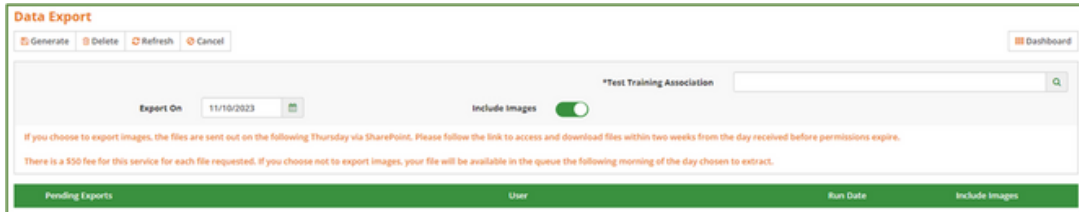
Delete WebAxis Registrations

- In your WebAxis admin portal select ADMINISTRATION/Manage Homeowners select association
 - o Hold the shift key to select multiple homeowners then click Delete Registered User
 - o To give users access to their account on the last day of the month, wait until the first business day of the next month to delete their registration



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Export Association Information



The screenshot shows a web interface titled "Data Export". At the top, there are buttons for "Generate", "Delete", "Refresh", and "Cancel". On the right, there is a "Dashboard" link. Below these, there is a search bar with the text "*Test Training Association". Underneath the search bar, there is a section for "Export On" with a date picker set to "11/10/2023" and a calendar icon. To the right of the date picker is a toggle switch labeled "Include Images" which is currently turned on. Below the toggle switch, there is a small orange text box with the following text: "If you choose to export images, the files are sent out on the following Thursday via SharePoint. Please follow the link to access and download files within two weeks from the day received before permissions expire. There is a \$50 fee for this service for each file requested. If you choose not to export images, your file will be available in the queue the following morning of the day chosen to extract." At the bottom of the interface, there is a table with four columns: "Pending Exports", "User", "Run Date", and "Include Images".

·Select Tools/Data Export

- o If you choose not to export images, your file will be available in the queue the following morning of the day chosen to extract.

Export will include: Association Information, Chart of Accounts, Account Descriptions, Checkbook, Checkbook Transactions, GL Transactions, Homeowner Address and Information, Homeowner Transactions, Invoices, Vendor and Vendor Contacts

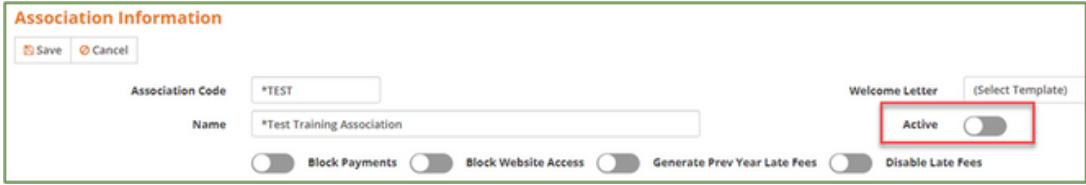
- o If Export Images is selected, the files are sent out on the following Thursday via SharePoint to the requesting user's email address.

Export will include everything above and images of: Checks, Invoices, Homeowner Correspondence Attachments, Association Notes Attachments, Vendor Notes Attachments



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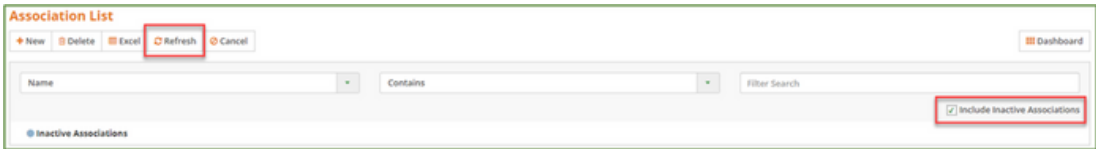
Deactivate Association



The screenshot shows the 'Association Information' form. At the top left are 'Save' and 'Cancel' buttons. The 'Association Code' field contains '*TEST'. The 'Name' field contains '*Test Training Association'. On the right, the 'Welcome Letter' dropdown is set to '(Select Template)'. Below this, the 'Active' toggle switch is highlighted with a red box and is currently turned off. At the bottom, there are five more toggle switches: 'Block Payments', 'Block Website Access', 'Generate Prev Year Late Fees', and 'Disable Late Fees', all of which are currently turned off.

- Select Setup/Association Setup select association
 - o Deactivate association at the close of business on the last day of managing the association. You can make the association active again at any time to work in it
 - o Toggle off the Active button and click Save
 - o When you make the Association Inactive, the system will automatically delete the Webaxis recurring payments during the overnight process.

Accessing a Deactivated Association



The screenshot shows the 'Association List' form. At the top left are buttons for 'New', 'Delete', 'Excel', 'Refresh', and 'Cancel'. The 'Refresh' button is highlighted with a red box. Below these buttons are search filters: 'Name', 'Contains', and 'Filter Search'. At the bottom right, the checkbox 'Include Inactive Associations' is checked and highlighted with a red box. A 'Dashboard' button is located in the top right corner.

- Select Setup/Association Setup
 - o Check the box next to Include Inactive Associations click Refresh on the screen