

Summary: This article provides an overview of the Vantaca Home for a Board Member. For demonstration purposes, assume you are a board member of the Presidential Valley Association. You'll learn about which Home sections are available to homeowners, which are available to Board members, what capabilities Owners have in Home, and how to navigate the Board-specific pages in Home.

Note: As a Board member, you will have access to specific pages when you log into the Owners Portal provided to you by your management company. Contact your management company for more information about your access to the different Board Portal sections.

Begin by logging in to the Owner Portal. Once you log in, you'll notice the Board Actions section in the left navigation. You as a Board member will have access to these specific pages.

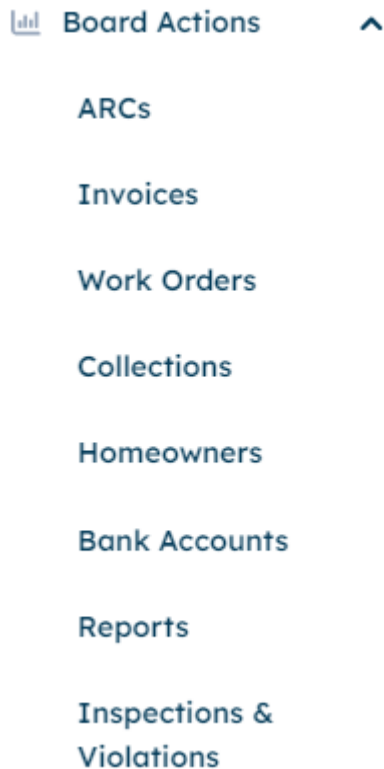
The screenshot displays the Vantaca Home dashboard for a Board Member. The left navigation menu includes: Dashboard, Payments, Requests, Calendar & Events, Directory, Documents, **Board Actions** (highlighted with a red box), FAQs, Help, and My Profile. The main content area shows a welcome message for 'jucky' and account details for 'Presidential Valley' (Main Street fd, Lawrenceville, GA 30043, Acct #: 10119224). The 'Payments' section shows an account balance of \$54,717.34 and upcoming charges of \$150.00. The 'Recent Requests' section shows a 'General Question - test' submitted on 4/07/2022. The 'Board Actions' section (highlighted with a red box) lists: ARC Management (All ARCs →), Work Orders (1 Work Orders →), Inspections & Violations (1 Inspections →), Collections (14 Collections →), and Invoices (All Invoices →). A 'More Items →' link is also present.

Reviewing the Dashboard, you'll notice at the top right it will show your current property, which you can use to switch between accounts from any screen. On your Owner Dashboard, you'll see Payment information, Recent Requests, Recent Reservations, and any Messages you may have. As a Board Member, you also have a special section **Board Actions** which will display your number of open To-Do items for each task.

With the left navigation, you can navigate quickly through Vantaca Home to make payments, submit a request, view the community and amenity calendars, view the homeowner directory, view association documents, or update your contact

information. *These are the same options that a normal owner in your community would have.*

The Board Actions section, which only Association Board members will have access to, displays various pages that can be used to manage their association.



Board Actions are separated by the type of tasks. You can approve or decline items from the following pages: ARCs, Invoices, Work Orders, and Collections. Each page has three tabs you can use to view items: My Items, which will show items currently assigned to your role; Open, which will show all open items; and Closed, which will show all closed items.

Approving and Declining

Based on the type of Action Item, a Board member may be able to Approve or Decline these tasks from the green menu box on the far right. The Action Item can always be viewed in more detail by clicking the eyeball icon to view Action Item Details. *Only items on the My Items tab will be actionable.*

Presidential Valley
Main Street rd, Lawrenceville, GA 30043
Acct #: 10119224

ARC Management

Board ARC Body Title GLOBAL

Board ARC Body Content - Request to formally change rules of the community - GLOBAL

Export

My Items Open Closed

Step	Due Date	ARC Type	Item Details	Description	Attach	Action
ARC Review			ARC Request / ARC Review Bob BoardMember 501 Hampton Blvd Action_Item_202105061834			
ARC Review		Different ARC type	ARC Request / ARC Review First Female President 900 History Way Unit Unit 405 asd;lkjfasdf			
ARC Review			ARC Request / ARC Review First Female President 900 History Way Unit Unit 405 asda			
ARC Review		Different ARC type	ARC Request / ARC Review Bob BoardMember 1825 Pennsylvania Ave test	test		
ARC Review		Other	ARC Request / ARC Review Bob BoardMember 1825 Pennsylvania Ave test	This is a test.		

Page 2 of 2 10 items per page 11 - 15 of 15 items

Board ARC FOOTER Content -- GLOBAL

Viewing Action Item Details

Clicking the Eyeball will open the Action Item Details, allowing you to see the historical events of this Action Item. You can send a new message to your management company here by clicking the **Type a Message** box next to the Envelope. If you have the option to Approve or Decline these items, those options will appear here as well.

Residential Valley
Main Street rd, Lawrenceville, GA 30043
Acct #: 10119224

Board Collections BODY Title GLOBAL

It's raining outside right now and a collection of water is pooling in my backyard. But that's not the type of collections we're talking about here. We're talking about a GLOBAL feat to see everything!

Export

My Items Open Closed

Step	Balance	Item Details	Attach	Action
First Notice	\$0.00	Collections (15 Day BMC) / First Notice VAN-1579 Acceptance criteria test (Collections)		
1st Notice	\$0.00	Collections (30 Day BMC) / 1st Notice VAN-1579 Acceptance criteria test		
First Notice	(\$99,942,703.02)	Collections - 30-15-15 / First Notice First Female President 100 History Way Unit Unit 201		
First Notice	\$15,210.00	Collections - 30-15-15 / First Notice First Female President 900 History Way Unit Unit 405 pay your bill		


Page 1 of 1 10 items per page 1 - 4 of 4 items

Board Collections FOOTER CONTENT GLOBAL

The ARCs, Invoices, Work Orders, and Collections pages show all open Action Items of that type and can also be used to research previously closed Action Items of that type. Depending on the settings established by your management company, you may have access to one or all of these pages. Contact your management company for more information about your access to the different Board sections in Vantaca Home.

Homeowners

The **Homeowners** page is a searchable directory of all owners that can be easily exported to Excel for reporting or documenting by clicking the **Export** button. The directory can be filtered by any column by clicking the 3 dots in the column header. You can also ascend or descend columns, adjust search values, and add or remove columns. To see previous owners, enable the **Previous Owners Only** checkbox. To view an owner's open Action Items, Charge Balances, or Transaction History, click on the Account number for the specific homeowner record. If you have a particular way you'd like to display this page every time you open it, including specific filters and sorting, you can click the **Gear** icon in the top right and click **Save Grid Settings**.



PRESIDENTIAL VALLEY
HOME OWNERS ASSOCIATION

Presidential Valley
Main Street fd, Lawrenceville, GA 30043
Acct #: 10119224

Home Owners

Board Homeowner List BODY GLOBAL

Please respect all privacy and piracy laws when viewing all homeowner information here. Understand that any edits made, will be on a GLOBAL level. We haven't seen the level 5 demon in quite some time, but he could be hiding out in here too. Please keep in mind that Community management is still not responsible for damages caused by this demon.

Export


Account #	Homeowner(s)	Address	Email	Balance
10110256		P: 24 Second Portal Test Street M: 111 test		
10133181	Keith	P: 101 Owner Test St M: 1123 Not the USA	secondprimary_@vantaca.tst	\$54,765.55
10110089	Chester Arthur Ellen Arthur	P: 1881 Pennsylvania Ave M: 1881 Pennsylvania Ave	maarten@vantaca.tst	\$60,388.18
10110085	Rutherford Birchard Lucy Hayes*	P: 1877 Pennsylvania Ave M: 12 test ave Unit 153	vantacatriagetest@gmail.com	\$56,476.00
10110067	Bob BoardMember	P: 1789 Pennsylvania Ave M: 1801 Pennsylvania Ave	bob@boardmember.com	\$54,928.30
10110068	Bob BoardMember	P: 17977 Pennsylvania Ave. M: 1801 Pennsylvania Ave	bob@boardmember.com	\$85,214.62
10110069	Bob BoardMember	P: 1801 Pennsylvania Ave M: 1801 Pennsylvania Ave	bob@boardmember.com	\$54,933.00
10110070	Bob BoardMember	P: 1809 Pennsylvania Ave M: 1801 Pennsylvania Ave	bob@boardmember.com	\$54,933.00
10110071	Bob BoardMember	P: 1817 Pennsylvania Ave M: 1801 Pennsylvania Ave	bob@boardmember.com	\$54,933.00
10110072	Bob BoardMember	P: 1825 Pennsylvania Ave M: 1801 Pennsylvania Ave	bob@boardmember.com	\$49,482.12

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10 items per page
1 - 10 of 66 items

Board Homeowner List FOOTER CONTENT GLOBAL

Bank Accounts

The **Bank Accounts** page gives you access to the Association Bank Account information for your community. You can view Bank Register items and transaction history for that account by clicking on the **Eyeball** icon for each account.



PRESIDENTIAL VALLEY
HOME OWNERS ASSOCIATION

Presidential Valley
Main Street fd, Lawrenceville, GA 30043
Acct #: 10119224

Bank Accounts

Bank Accounts BODY Title GLOBAL

Bank Accounts BODY content GLOBAL				
Account Name	Bank Name	Account Type	GL Account	Balance
Main	CIT	Operating	Operating	\$100,049,190.00
test12355	Alliance Association Bank (AAB)	Other DDA	(Er)Mergerderh	\$1.00

Bank Accounts FOOTER content GLOBAL

Reports

The **Reports** page lets you run various reports directly from Vantaca Home. You can either View the report to specify parameters like date range and what you want to display or simply click Download PDF to see the default report. This gives you a level of transparency second to none with your community!

The screenshot shows the 'Reports' page for 'Presidential Valley' HOA. The page includes a sidebar with navigation options: Dashboard, Payments, Requests, Calendar & Events, Directory, Documents, Board Actions (highlighted), ARCs, Invoices, Work Orders, Collections, Homeowners, Bank Accounts, Reports (highlighted), Inspections & Violations, FAQs, Help, and My Profile. The main content area is titled 'Reports' and shows a search bar and a list of reports categorized under 'Accounting' and 'Association'. Each report has 'View' and 'Download PDF' buttons.

Reports Body Title GLOBAL	
Reports Body CONTENT GLOBAL	
<input type="text" value="Search"/> <input type="button" value="Q"/>	
Accounting	
GL Entry Report	View Download PDF
Service Provider Usage Report (by Association)	View Download PDF
Service Provider Usage Report (by Service Provider)	View Download PDF
Association	
Collections Report	View Download PDF
Homeowner Charge Percentages	View Download PDF
Homeowner Charge Tags	View Download PDF
Homeowner Other Tags	View Download PDF