

REPORTS

Frequently Used, How To, & Downloading & Printing

REFERENCE RESOURCES:

<https://vantaca.zendesk.com/hc/en-us/articles/360016173892-How-to-View-Vantaca-Reports>

<https://vantaca.zendesk.com/hc/en-us/articles/360030536591-Types-of-Reports>

FREQUENTLY USED REPORTS:

Jenark Report	Vantaca Counterpart Report
<i>Resident Transaction Report</i>	Homeowner Transaction History OR Statement
<i>Delinquent & Prepaid Report</i>	AR Aging OR AR Aging Summary
<i>Misc. Income Report</i>	Deposit Register
<i>Move In/Move Out</i>	Owner Transfer Report
<i>Voter Registration</i>	Meeting Sign-In OR Meeting Sign-In (Consolidated)
<i>RM > Run Labels & Envelopes</i>	Homeowner Mailing Labels (Avery 8160 label sheet)
<i>Resident Listing</i>	<ul style="list-style-type: none">• Not a report!• Homeowners > Homeowner List• Use your columns to populate the information you want to include.• Once displayed – Export to Excel Button

NEW/INTERESTING VANTACA REPORTS:

ARC Report

Shows all ARC Request action items with a step in the given time range. Can adjust details shown and filter the action items by their current status.

Violations Report

Shows all Violations action items with a step in the given time range. Can adjust details shown and filter the action items by their current status.

Prepaid Homeowners

Shows all owners with a total in their Credit charge type as of the chosen date.

Mailing Addresses Export

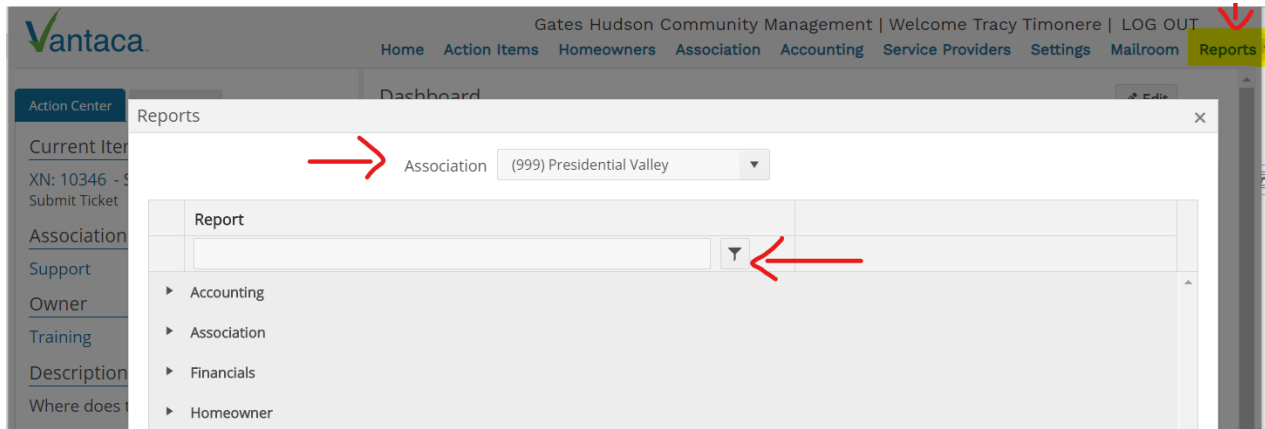
Excel-only report. This report exports all addresses in Homeowner > Contact Info that are marked as “Is Mailing Address.” (If there are none, the Property Address will be listed.)

DOWNLOADING & PRINTING REPORTS

Navigate to the Reports menu near the top right corner of the screen. Another window will open.

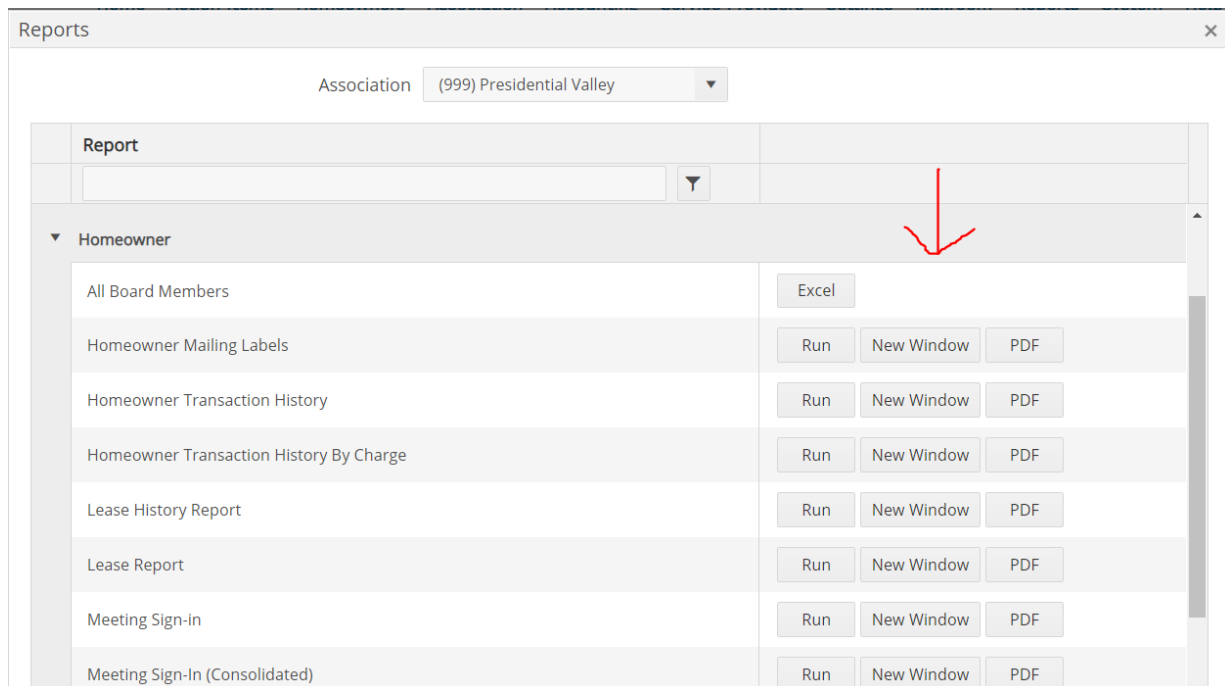
Select the Association using the drop down arrow from the list at the top of the window.

- If you know the name of the report (full name or partial) type it into the search field.
- Or click on the arrow to the left of the relevant category to view all the report options.



GENERATE THE REPORT:

- Run Button: opens the report in the Report Viewer screen.
- New Window Button: allows users to open multiple reports at the same time.
- PDF Button/Excel Button: the report will download to your computer in the selected file format.



RESIDENT LISTING EXPORT INSTRUCTIONS:

The resident contact list is *NOT* a report. Follow these steps to create a contact list document.

1. Homeowners > Homeowners List
2. Use the 3 dots to select the columns you want to include
3. Click the Export to Excel button
4. The document will download to your computer.

The screenshot shows a web application interface for managing homeowners. The navigation bar includes links for Home, Action Items, Homeowners, Association, Accounting, Service Providers, Settings, Mailroom, Reports, System, and Help. The current page is titled "Homeowner List - (999) Presidential Valley". Below the title, there is a "Manager" dropdown menu showing "Vantaca Support". The main content area features a table with columns for "Homeowner", "All Phones", and "All Emails". Each row represents a homeowner and includes "Edit" and "Select" buttons. At the top of the table, there is an "Export to Excel" button. The footer of the table shows "Page 1 of 1", "1000 items per page", and "1 - 46 of 46 items".

	Homeowner	All Phones	All Emails	
<input type="checkbox"/>	John Quincy Adams Louisa Catherine Adams	(888) 999-5555, Work: (703) 752-8300	johnadams@formerprez.com, johnquincy@formerprez.com	Edit Select
<input type="checkbox"/>	John Quincy Adams Louisa Catherine Adams	(888) 999-5555, Work: (703) 752-8300	johnadams@formerprez.com, johnquincy@formerprez.com	Edit Select
<input type="checkbox"/>	John Quincy Adams Louisa Catherine Adams	(888) 999-5555, Work: (703) 752-8300	johnadams@formerprez.com, johnquincy@formerprez.com	Edit Select
<input type="checkbox"/>	Chester Arthur Ellen Arthur		maarten@vantaca.com	Edit Select
<input type="checkbox"/>	Rutherford Birchard Lucy Hayes	(444) 444-4444	rutherford@formerprez.com	Edit Select
<input type="checkbox"/>	James Buchanan	(444) 444-4444	james@formerprez.com	Edit Select