

VIOLATIONS (INSPECTIONS)

Association Additional Info for Letters

Customize CCR Text

Community Wide Inspections

Create Individual Violations



Updated 6.2021

REFERENCE RESOURCES:

<https://vantaca.zendesk.com/hc/en-us/articles/360007745871-Association-Additional-Info->

<https://vantaca.zendesk.com/hc/en-us/articles/360029381572-Navigating-CCR-Violation-Types>

<https://vantaca.zendesk.com/hc/en-us/articles/360033797132-How-to-use-the-Mobile-App-for-Violation-Inspections>

<https://vantaca.zendesk.com/hc/en-us/articles/360046074352-Violation-Inspection-Review>

<https://vantaca.zendesk.com/hc/en-us/articles/360041081432-Individual-Violations-Outside-of-an-Inspection>

ASSOCIATION > ADDITIONAL INFO

The information in these fields will autofill into the association(s) letter, allowing us to customize our default template. **This information MUST be entered BEFORE conducting any inspections.**

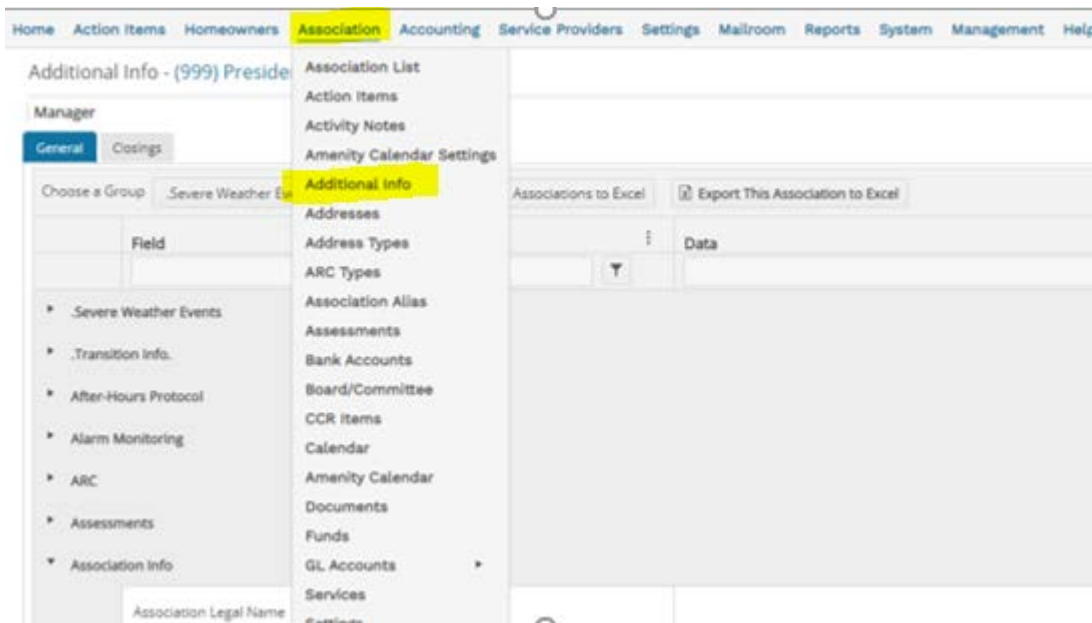
In the Association > Additional Info screen find these fields and fill in the relevant information for that specific association:

1. Portfolio/Onsite Manager Name & Designation > Manager Name & Designation

This name will autofill into the signature block of the letter. Usually the Portfolio or Community Manager.

2. Association Info > Violations Email Contact

This should be the email address for whomever the responses should be directed to. Usually the Administrative Assistant or Community Manager.



EDITING CCR LETTER TEXT

Prior to conducting inspections, we can enter frequently used violation/governing document text into Vantaca for specific categories customized to each association.

1. Navigate to Association > CCR Items > Association CCR tab
2. Select the correct association, if it isn't already chosen
3. Find the relevant category in the Description Column
4. Click the arrow on the left to expand.

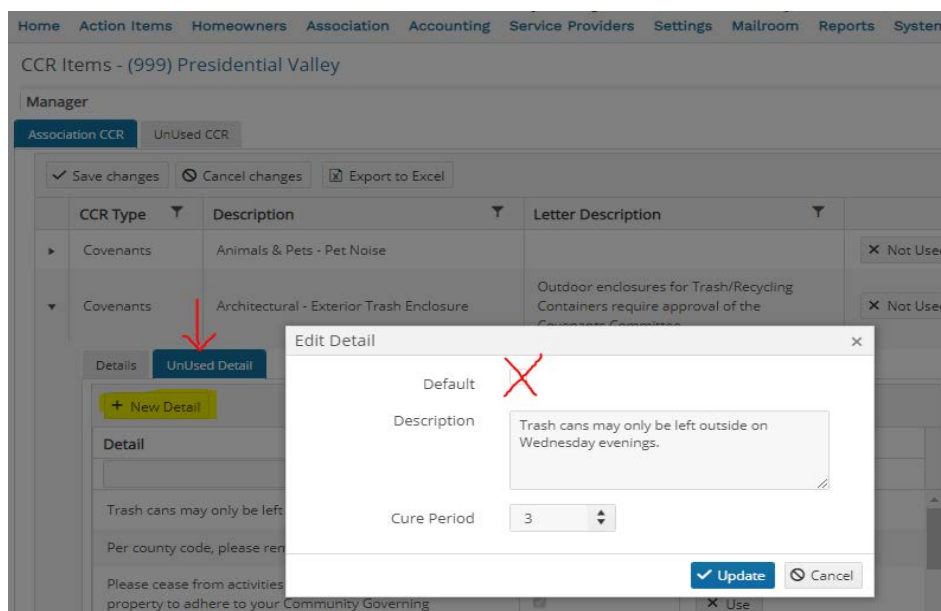
Here we can edit the Description, Detail and Letter Description fields:

Description – the violation categories/types.

1. To rename any Description, click on the text to open the text box. Click the Save Changes button in the top left corner.
2. If the category isn't relevant to this association, click the Not Used button to remove it from the list. Click the Save Changes button in the top left corner.
3. Never touch the CCR Type column. That will always be Covenants.

Detail – a short explanation of what the *exact violation* is. (Ex. Please power wash the front steps.) Use this for frequently used violations. You can always enter other text during the inspection.

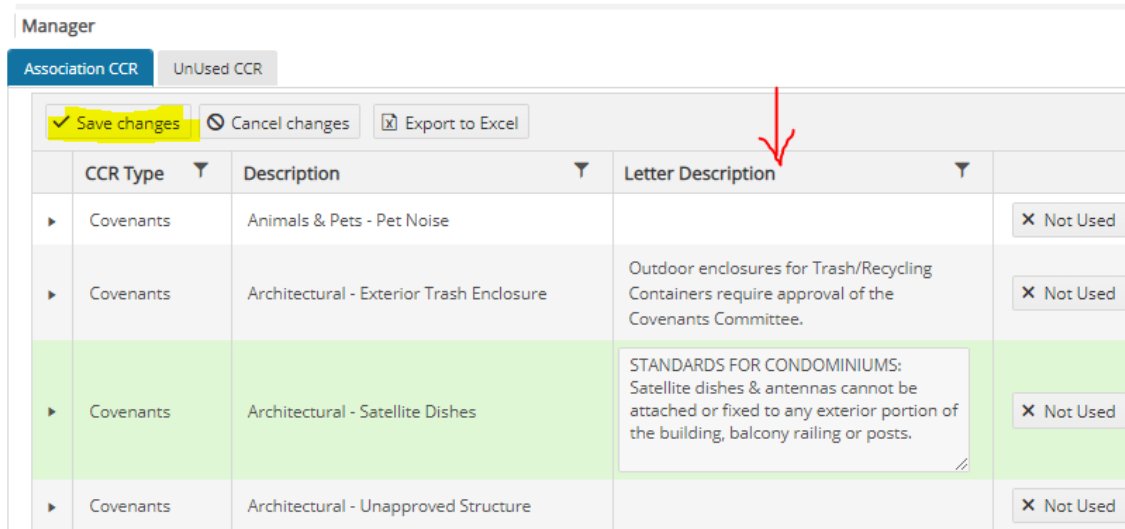
1. Click on the UnUsed Detail tab.
2. If the text you want is already there, click on the Use button and then Save Changes button.
3. Otherwise, click the + New Detail button to add it.
4. Then click the Use button to add it. Be sure to Save Changes.
5. You can edit the Cure Period (amount of time the owner has to fix the violation) at any time.
6. If adding the New CCR Item for just one Association, do not mark the Default box, and do not enter the Letter Description on this screen.



Letter Description – the specific governing document text relevant to this violation:

1. In the Letter Description Column click on that field and a text box will open.
2. Enter whatever text you want to appear in the letter in this box:
 - a. Feel free to keep/edit/remove the sentence that’s already there
 - b. You should be able to copy/paste from a document
 - c. The information should start with citing the governing doc. Ex. *Per the Bylaws Article V, Section 2a, “-----“.*
3. When you are done, click the Save Changes button in the top left corner.

CCR Items - (999) Presidential Valley



VIOLATIONS INSPECTIONS

Use the Vantaca App to conduct the inspection:

<https://vantaca.zendesk.com/hc/en-us/articles/360033797132-How-to-use-the-Mobile-App-for-Violation-Inspections>

1. Select the Association and then **Full Inspection** (NOT Closing Inspection)
2. The list of address will be displayed on the screen. Select the relevant address and follow the prompts.
3. If this is a New Violation, click on that link:
 - a. Fill in the CCR Item, Description, Step and Cure Date fields
 - b. To include a photo, click on the camera icon under attachments.
 - i. You can take multiple photos, but the letter will only display the last photo taken. The rest of the photos will be visible to the owner in the portal.
 - c. Click Done in the top right corner, and then navigate Back to the address list. Repeat.
4. If this is a Follow Up Violation, find the relevant category displayed on the owner’s account:
 - a. Fill in the Description, Step and Cure Date OR Hearing Date fields.
 - b. To include a photo, click on the camera icon under attachments.
 - c. Click Done in the top right corner, and then navigate Back to the address list. Repeat.
5. Be sure to select **End Inspection** when done.

After the inspection return to office and log in to the Vantaca.net site

1. Navigate to Association > Inspections
2. Review the individual letters here
 - a. Instructions here: <https://vantaca.zendesk.com/hc/en-us/articles/360046074352-Violation-Inspection-Review>
3. When Approved the letters will be sent to the Mailroom > Print Queue and the action item will appear on the owner's account Vantaca and in the portal.

CREATING INDIVIDUAL VIOLATIONS

We recommend using the App and following the steps above, however you can also create one letter at a time using an action item.

Homeowner > Action Item > +New Action Item

1. Action Type = Violations (DC/MD/VA) – be sure to correctly select where the association is located.
2. Use the Description box to enter anything specific to the violation. This will fill into the letter.
3. Use the Attachments menu to upload a photo.
4. Update the action item.
5. The letter will NOT go to a Review step. It will move immediately to the Mailroom > Print Queue.

Action Item

Association: Residential Valley
 Owner: The New President President
 Property Address: P: 2001 Pennsylvania Ave
 Action Type: Violations - VA
 Current Step: 1 - First Notice

Details

No Notifications

CCR Item Animals & Pets - Pet Noise Hearing Date

CCR Detail Please keep pet noise quiet ... Cure Date 7/1/2021

Subject

B I U [List Icons] [Code Icon] (inherited font) (inherited size) [Image Icon] [Link Icon] [Unlink Icon]

Please keep pet noise quiet by keeping dog attended to at all times. Enter anything else you want to say.

Description

Other Email

Include Tenants

Dates and Assignment

Attachments

Parameters

Preview Update and Select Update Cancel