HOA Plugin for Act!

Our HOA plugin provides a simple yet effective way for HOAs to organize and manage their workload within Act!

- Provides a ticketing system for easy documentation of anything going on with a given lot
- Works great in both single computer and networked environments
- Can create customizable PDF reports for easy distribution

Our plugin was developed from the ground up in direct collaboration with HOAs. As Kim Brice, Association Manager of the Owl Creek Community Association, describes:

I have been using the HOA plug-in for ACT for several years now and it is an easy, efficient way to keep track of each lot owner and any activity affecting them. I couldn't manage without it!

Before Installing

Our plugin operates under these assumptions:

- You are using Act! version 16 or later
- Each Act! contact represents a lot
- Each Act! contact contains a *lot* primary field for unique identification
- You have administrative rights

If all of these criteria are met, you are ready for installation!

Installation

1. Make sure Act! is closed
2. Download and run our installer, and click *Install*
3. Provide the server's computer name (e.g. *SERVER-PC*)
4. The password defaults as a random sequence of 12 digits
    - For the server, if you change the password, make sure that it satisfies SQL Server's password policy
    - For networked computers, use the server's password
    - If you ever forget your password, it can be found as follows:
        - Go to *Program Files (x86)*, or just *Program Files* if you are using a 32-bit version of Windows
        - Go to *ACT -> Act for Windows -> Plugins*
        - Your password will be in the *hoaconfig.txt* file
5. After clicking *Next*:
    - For the server, continue to step 6
    - For a networked computer, continue to step 9
6. Confirm that the computer is the primary server
7. Confirm that you would like to install SQL Server
8. After SQL Server has finished installing, select a directory for automatic backup
    - Note: By default, your data will automatically back up at midnight daily. To change this, see our *Usage Guide*.
9. Installation complete! You should now have an *HOA* tab in Act!
10. Check out our *Usage Guide* for a complete run-down of what makes our plugin so great

Usage Guide

This document is intended to help you get familiar with the ins and outs of our HOA Plugin for Act!

Ticketing System

The ticketing system is the core of our plugin. A ticket is entered into one of four categories:

- Calls / Complaints
- Crimes
- Architectural Requests
- Architectural Violations

To enter a ticket, just click *New* above the desired category and fill the ticket out as you please, clicking *Save Ticket* when you're done.

A more advanced feature is available through the *Select Caller* button. Say someone called in to report a break-in that they witnessed on a neighboring lot. You would go to the lot's contact page and create a new ticket in the *Crimes* category. Before submitting it, you could click *Select Caller* and *Search* for the caller's name, *Select*ing them from the results.

The end result will be a ticket in the lot that was called about's page, as well as an additional ticket on the caller's page, noting their call.
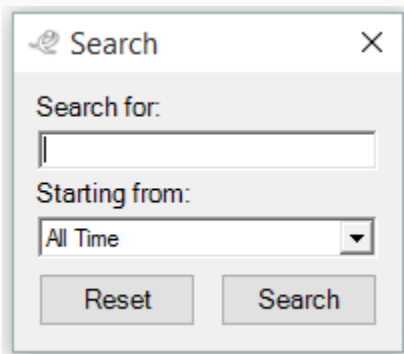
Search

If you entered a ticket, but you can't remember what lot it was for, *Search* is here to help.

Just right click one of the four ticket category boxes, and you will be provided with a search pop-up.

Just specify a search term and (optionally) limit the search date, and click *Search* to see the results.

To go back to viewing all lots, merely click the *Reset* button.

Tip: You can also leave the *Search for* field blank and just specify the starting date, allowing you to, say, view tickets from the past week.
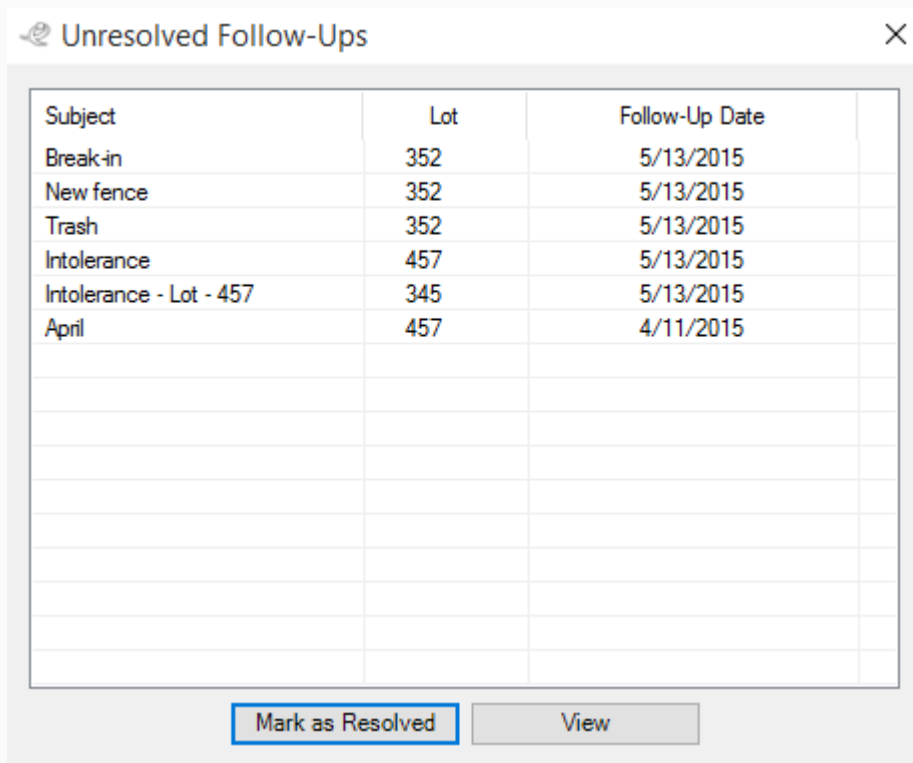
Follow-Ups

After adding a ticket with, say, a follow-up date in 2 weeks, you don't want to have to manually dig around to remember which ticket it was. That's what the *Follow-Ups* button is for.

As seen on page 2 of this document, the *Follow-Ups* button is displayed as, for example, *Follow-Ups (6)*, indicating that there are 6 unresolved tickets that have follow-up dates that are set for either the present day or a day in the past.

Clicking it presents you with a window that shows all such tickets, allowing you to easily manage them.

You can either double click on a ticket or click *View* to jump to it in our *HOA* tab. Or, if you just want to quickly mark that the ticket has been resolved, click an item once, and then click *Mark as Resolved*.

Unresolved Follow-Ups		✕
Subject	**Lot**	**Follow-Up Date**
Break-in	352	5/13/2015
New fence	352	5/13/2015
Trash	352	5/13/2015
Intolerance	457	5/13/2015
Intolerance - Lot - 457	345	5/13/2015
April	457	4/11/2015
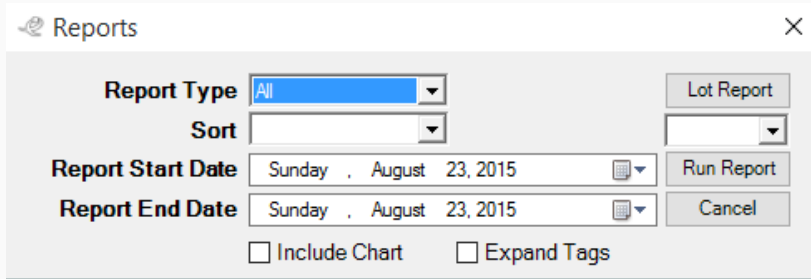
[Mark as Resolved]   [View]

Reports

To generate a report, first click the *Reports* button.

You will then be able specify the types of tickets to include in the report (*Calls, Crimes, Arch Requests, Arch Violations, Open Items, Closed Items, All, Lot Summary*), how to sort the tickets within the report (by *Date, Subject, Name, Type, Lot, Search Item, Follow Up Date, Open Items*), and a date range.

Click *Run Report* when you are ready, and you will be asked where to save the report. After doing so, the report will attempt to open using your default PDF viewer.

You can also just specify a date range and click *Lot Report* to quickly generate a report for the current lot.

Below is an example of a lot report limited to tickets from 5/13/2015

Lot 352 Summary Report Start - 05-13-15 - Report End - 05-13-15 - Page 1

Ticket Type	Date	Subject	Description	Name	Address	Comments	Resolved
CallsComplaints	05/13/15	Noise	Too quiet!	Huffman, Chris & Pat	13 East 54th St.		Open
Crimes	05/13/15	Break-in	Breaking into some new pants	Huffman, Chris & Pat	13 East 54th St.		Open
ArchRequests	05/13/15	New fence	Self explanatory	Huffman, Chris & Pat	13 East 54th St.		Open
ArchViolations	05/13/15	Trash	It's everywhere!	Huffman, Chris & Pat	13 East 54th St.		Open

Checking the box for *Include Chart* will include a pie chart with your report, allowing you to see a breakdown of tickets by category (determined by a ticket's *Subject* field). Checking *Expand Tags* along with this will allow for more detailed categories to appear in the chart.

We recommend expanding tags for smaller, monthly reports, and leaving the option unchecked for larger ones.
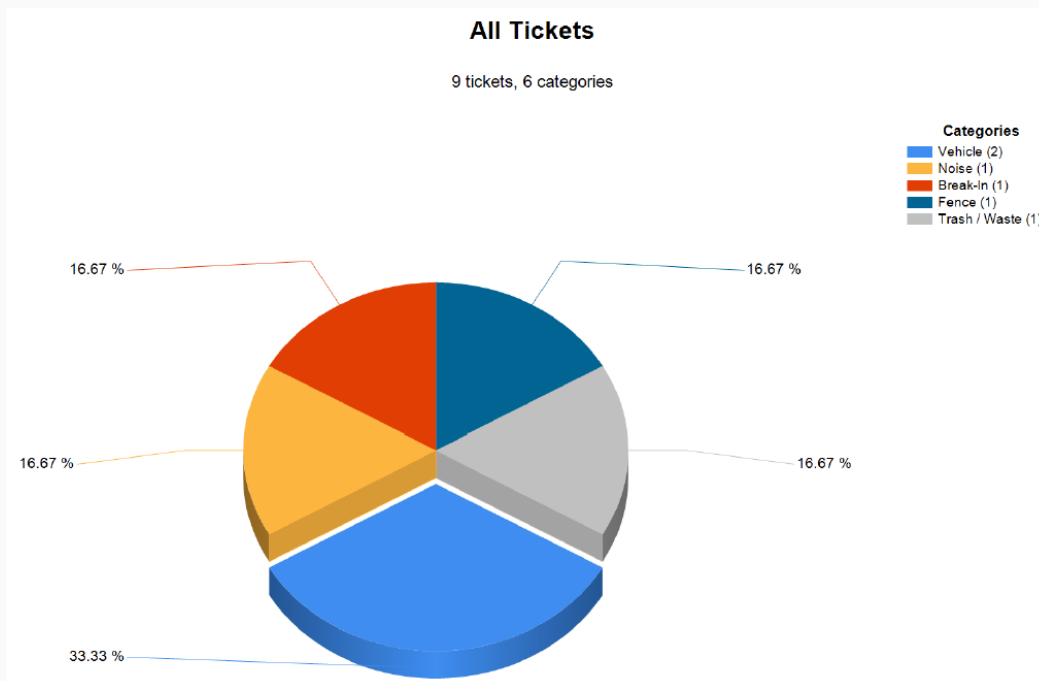
Backup / Restore

All of the tickets that you create are saved outside of Act! in the SQL Database that was created by our installer. As such, merely backing up your Act! database will not back up the tickets. Instead, you can back up your data by clicking the *Backup* button.

Doing so will provide you with a pop up window with the options to back up or restore your data, or to manage your automatic backup settings.
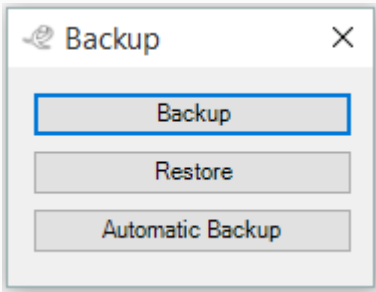
Clicking *Backup* will present you with a window for you to choose where to save your database.

Clicking *Restore* will present you with a window for you to choose a database to load.

Clicking *Automatic Backup* will present you with the following window to manage your automatic backup settings:
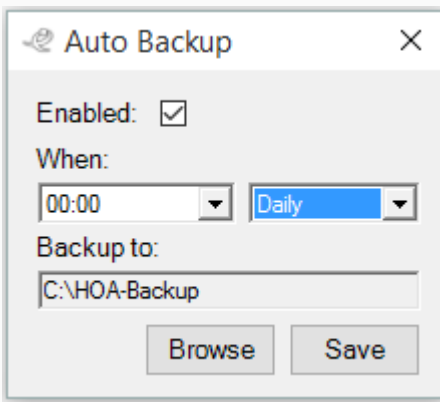
Support

For any questions, comments, bug reports, feature requests, or even general praise, please contact support@elucidations.net or call (502) 589-3979