

## Homeowners Information

The Homeowner's section shown in red on the example, is a searchable directory of all owners. This can easily be exported to Excel for reporting or documenting by clicking on the export to Excel 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, check the Previous Owners Only box.

To view an owner's open Action Items, Charge Balances or Transaction History, click on the drop-down arrow next to a specific homeowner record. Click the Show Owners button again to refresh your Homeowners List.

The screenshot shows the 'Board Homeowner List' interface for 'Utopia HOA'. The left sidebar has a 'Homeowners' item circled in red. The main table has a 'Previous Owners Only' checkbox checked and circled in red. A red arrow points to the 'Export to Excel' button. Another red arrow points to the 'Homeowner' column header, which has a dropdown menu open showing 'Sort Ascending', 'Sort Descending', 'Columns', and 'Filter'. A third red arrow points to the 'Balance' column header.

Account #	Homeowner	Address	Email	Balance
▶ 99991224	ARC Hero		maarten@vantaca.com	\$4,626.45
▶ 99991221	Anna		kayteejoy@yahoo.com	\$4,438.45
▶ 99991233	Test Board Role	P: 98 test M: 98 test	maarten@vantaca.com	\$4,418.45
▶ 99991231	Estate of Shelly Ann DeAntonio	P: 617 Trails End Rd M: 123 Fulsom Ln	sdeantonio@csmggroup.com, bdsnow@vantaca.com	\$5,711.62