



Revenue – Miscellaneous Billing

MB-639 HVMA Condo Reports

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1 HVMA Condo Reports

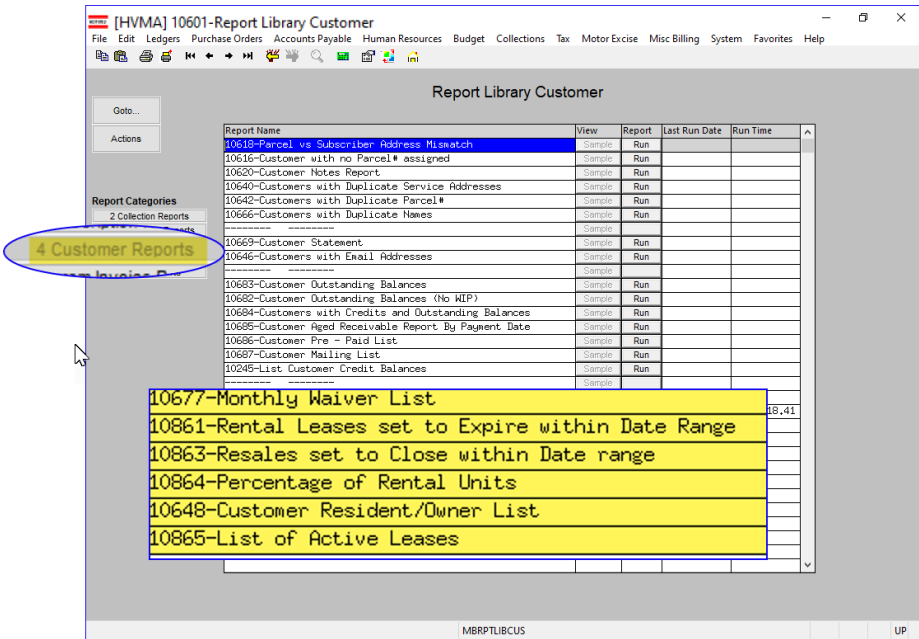
ADMINS offers detailed reports on HVMA condominium leasing and sales activity. You can access these reports from the menu by selecting:

Misc Billing ► Reports ► Customer Reports

The following sections detail each report.

Additional reports can be accessed through the customer maintenance screen. Details on these reports are found in the **MB-630 Customer Maintenance** document within the Help Reference Library.

Click on the desired report to make it the active report and click on **Run** to generate the report.





1.1 Customer Resident/Owner Report #10648

Clicking **Run** on this report will display this prompt. Choose the type of Resident/Owner/Tenant for inclusion on the report. “Run as” either **PDF** or **Excel**.

Task 10648: Customer Resident/Owner List

Customer Resident List

Include ☒ Residents [Owners and Tenants] ☐ Owners Only ☐ Tenants Only

Run as ☐ Preview ☐ Print ☒ PDF ☐ Excel

If Printing use Duplex ☒ Yes ☐ No

Lookup OK Cancel Clear All

Table 1 List of Fields on the Customer Resident/Owner Report #10648

Column Label	Description/how used
1 Cust #	The Unit number of the Condominium, also known as the Customer Number
2 Location	The street address of the Unit within the Heritage Village
3 Line	The Line number of the owner or resident from the Owners or Residents Tab of the Customer Maintenance screen
4 Resident Name	The name of the person residing in or owning the unit
4 a Email Address	If the email address was supplied, it will print below the person's name
5 O/T	This column can display an “O” for Owner or a “T” for Tenant
6 Res	This column can display an “R” that indicates the person resides in the unit, or an “N” indicates that the person is not a resident. Both Tenants and Owners can be residents.
7 DOB	If the Date of Birth was supplied on the Customer screen, the date will print in this column
8 Age	If the DOB has a date, the system will calculate the age of the person on this line
9 Phone #1	If a phone number is supplied it will be listed here
10 Phone #2	If a second phone number is supplied it will be listed here
9 b Phone #1 B/C/F/H/P	If either Phone Number #1 or #2 was specified as a “C” for Cell, or “H” for Home, it will print below the phone number – the list identifies what each letter means
10 c Phone #2 B/C/F/H/P	

B Business
C Cell
F Fax
H Home
P Pager

1.1.1 Include Owners & Tenants

The numbered entries in the image on the right correspond to the column descriptions in [Table 1](#) above. This example includes **Residents (Owners and Tenants)**.

10648-MBCUSRESLST.REP Printed 07-Oct-2024 at 13:39:21 Heritage Village Master Association Customer Resident/Owner List Page 1

1 Cust#	2 Location	3 Line	4 Resident Name / Email Address	5 O/T	6 Res	7 DOB	8 Age	9 Phone 1	10 Phone 2
1000A	1000A HERITAGE VILLAGE	1	STEPHEN STILLAS bandsinger@admins.com a	O	R	15-May-1959	65	(203) 555-1416 C	(203) 555-1212 H c
1000A	1000A HERITAGE VILLAGE	6	PETER TORK	T	R				
1000A	1000A HERITAGE VILLAGE	7	MICKEY SOLESKI	T	R				
#Residents				3					
1001B	1001B HERITAGE VILLAGE	1	SEAN LENNON	O	R			(203) 777-5511	
1001B	1001B HERITAGE VILLAGE	6	JOANIE MITCHELL	T	R	04-Apr-1930	94	(203) 264-3097	
1001B	1001B HERITAGE VILLAGE	7	DAVID CROSBY	T	R				
#Residents				3					



1.1.2 Include Only Owners

This example includes **Owners Only**. Notice that only **"O for Owner"** types are shown in the highlighted column. In the Res column, notice that one of the owners is a Resident, and the other is Not for Unit 1001B.

10648-MBCUSRESLIST.REP Printed 07-Oct-2024 at 13:42:50 Heritage Village Master Association Customer Resident/Owner List Page 1

Cust#	Location	Line	Resident Name / Email Address	O/T Res	DOB	Age	Phone 1	Phone 2
1000A	1000A HERITAGE VILLAGE	1	STEPHEN STILLS bandsinger@admins.com	O	R	15-May-1959	65	(203) 555-1616 (203) 555-1212
				#Owners				
				1				
1001B	1001B HERITAGE VILLAGE	1	SEAN LEWIS	O	R			(203) 777-5511
1001B	1001B HERITAGE VILLAGE	2	YOKO ONO	O	N	18-Feb-1933	91	
				#Owners				
				2				

Selection Legend:
Select [R]Residents (Owners and Tenants), [O]Owners or [T]Tenants: O

1.1.3 Include Only Tenants

This example includes **Tenants Only**. Notice that only **"T for Tenant"** types are shown in the highlighted column. The Selection legend lists which of the three selections was made when the report was run.

Resident Listing 10648 "F" Adobe Acrobat Reader (54 kb) Printed 07-Oct-2024 at 13:46:12 by THERESA Heritage Village Master Association Customer Resident/Owner List Page 1

Cust#	Location	Line	Resident Name / Email Address	O/T Res	DOB	Age	Phone 1	Phone 2
1000A	1000A HERITAGE VILLAGE	6	PETER YORK	T	R			
1000A	1000A HERITAGE VILLAGE	7	MICKEY DOLENT	T	R			
				#Tenants				
				2				
1001B	1001B HERITAGE VILLAGE	6	JOANIE MITCHELL	T	R	04-Apr-1930	94	(203) 264-3097
1001B	1001B HERITAGE VILLAGE	7	DAVID CROSBY	T	R			
				#Tenants				
				2				

Selection Legend:
Select [R]Residents (Owners and Tenants), [O]Owners or [T]Tenants: T

1.2 Monthly Waiver List #10677

The Monthly Waiver List #10677 report will provide a list of all In Progress and Processed Resales with a closing date within the range entered.

Enter the required date range; click

OK

Task 10677: Monthly Waiver List

Monthly Waiver List
Selects all In-Progress and Processed Resales with a Closing Date within the Date range entered

Required: Enter Date Range From: 01012024 To: 12312024

Run as ☒ Excel

Lookup OK Cancel Clear All



Monthly_Waiver_List_10677_THERESA[1].xml - Excel													
File Home Insert Page Layout Formulas Data Review View Help													
F21 X ✓ fx Jim A Warden													
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	1	2	3	4	5	6	7	8	9	10	11	12	13
2						Sales Period: 01-Jan-2024	31-Dec-2024						
3													
4	Unit#	Condo#	Unit Type	Close Date	Seller Name	Buyer Name	Residing In Unit	Phone#	Email	Current Tenant Name	Status	Resale Sent Date	Closing Sent Date
5	1000A	20	COUNTRY HOUSE	10/1/2024	STEPHEN STILLIS	JAMES DEVANEY BONNIE SMITH	Flipper	N/A	JAMES@ADMINS.COM		Active	9/30/2024	9/30/2024
6	1000A	20	COUNTRY HOUSE	9/1/2024	DAVID JONES MIKE NESMITH	TED LASSO	Yes	(978) 555-4141	support@admins.com		Active	9/19/2024	9/19/2024
7	1001B	20	BERK-1	11/15/2024	SEAN LENNON YOKON ONO	JOHN SMITH JONI MITCHELL	P/T	(555) 121-2020		Mark Wahlberg	Active	10/3/2024	
8	1001B	20	BERK-1	11/15/2024		JOHN SMITH JONI MITCHELL	P/T	(555) 121-2020		Mark Wahlberg	Closed		
9	1001B	20	BERK-1	12/1/2024	SEAN LENNON YOKON ONO		Not answered	N/A			Active	9/30/2024	9/30/2024
10	1003B	20	COUNTRY HOUSE	9/1/2024	RAYMOND W. BRANCA	Jimmy S Dean Sam White	Yes	N/A			Active	8/29/2024	9/5/2024
11	1003B	20	COUNTRY HOUSE	9/1/2024		Jimmy S Dean Sam White	Yes	N/A			Closed		
12	1007A	20	COUNTRY HOUSE	11/1/2024	HOLLINS, JULIA	Teddy Flipper	Flipper	N/A			Active	9/6/2024	9/6/2024
13	1015A	20	SHERMAN	8/11/2024			Not answered				Closed		

Figure 1 The numbers in the report excerpt above correspond to the numbers in the table below

Table 2

Column Label	Description/How used
1 Unit#	The Unit # of this condominium unit – also known as customer number
2 Condo#	The Condo # for this unit type. See the MB-632 HVMA Condominium Documents Table Setup guide in the Help Reference Library for more information about Condo #.
3 Unit Type	The Unit Type corresponds to the Class Type defined in the Class Type table. See the MB-632 HVMA Condominium Documents Table Setup guide in the Help Reference Library for more information about Condo #.
4 Close Date	The closing date stated at the start of the resale process (<i>if unknown, enter a provisional date to obtain data for the desired month to ensure that the in-progress transaction will be listed.</i>).
5 Seller Name	The name(s) of the seller(s) as shown in the database
6 Buyer Name	The name(s) of the buyer(s) as entered when the resale process was started.
7 Residing In Unit	The Residing in Unit values can be: Flipper (who does not intend to reside in the unit but rather reno/resell), Yes (for an owner residing in the unit), P/T (part time resident owner), Not answered (if the answer is unknown)
8 Phone#	The phone number from the person's record on the customer maintenance screen
9 Email	The email address from the customer maintenance screen
10 Current Tenant Name	If the unit is leased, the name(s) of the current tenant(s)
11 Status	Active means that the resale is in progress Closed means that the resale is complete, and the customer maintenance owner record has been marked as "Closed" Closed – No Sale – the data from the resale is still in the file, but the sale did not go through
12 Resale Sent Date	The date that the resale packet was sent to the buyer/buyer's attorney/agent
13 Closing Sent date	The date that the closing packet was sent to the buyer/buyer's attorney/agent
14 No Sale Processed	The date that the transaction was marked as a "no sale"



1.3 Rental Leases Set to Expire Within Date Range Report #10861

Enter the required date range. The report will be split into two sections – leases expiring within the next seven days, and those expiring within 30 days.

The numbers on the image correspond to the numbers in the table below.

1	2	3	4	5	6	7
Unit#	Lease Start	Lease End	Seq#	Owner Name	Renewal Sent	By
Leases ending in the next 7 days						
399E	10/10/2014	10/9/2024	1	JONES, JASON & SAMANTHA BEE	9-Sep-24	ANTHEA
Leases ending in the next 30 days						
1023B	10/23/2023	10/31/2024	1	MARK MARON	9/30/2024	WENDY
14C	11/1/2023	10/31/2024	1	DAN COSTA		THERESA
189D	11/1/2015	10/31/2024	1	DELSI LYDICK		LUANN
191D	11/1/2022	10/31/2024	1	RONNIE CHIANG		ANTHEA
20D	11/1/2023	10/31/2024	1	JORDAN KLEPPER		WENDY
267A	10/14/2019	10/31/2024	1	STEPHEN COLBERT		THERESA
407A	10/17/2014	10/31/2024	1	JIMMY FALLON		LUANN
408A	11/1/2019	10/31/2024	1	JIMMY KIMMEL		ANTHEA
430A	11/1/2019	10/31/2024	1	GEORGE STEPHANOPOLOUS		WENDY
484D	11/1/2022	10/31/2024	1	MIKA BREZHINSKI		THERESA
678A	11/1/2022	10/31/2024	1	DAVID CAMPBELL		LUANN
					8	11
Selection Legend:						
Date Range: 01-Sep-2024 to 31-Oct-2024						

Table 3

Column Label	
1	Unit#
2	Condo #
3	Lease End
4	Seq #
5	Owner Name(s)
6	Renewal Sent
7	By
8	Selection Legend
9	Email



Column Label

10	Current Tenant Name	If the unit is leased, the name(s) of the current tenant(s)
11	Status	Active means that the resale is in progress Closed means that the resale is complete, and the customer maintenance owner record has been marked as “Closed” Closed – No Sale – the data from the resale is still in the file, but the sale did not go through
12	Resale Sent Date	The date that the resale packet was sent to the buyer/buyer’s attorney/agent
13	Closing Sent date	The date that the closing packet was sent to the buyer/buyer’s attorney/agent

1.4 Resales Set to Close Within a Date Range Report #10863

Task 10863: Resales set to Close within Date range

Resales set to Close within Date Range

Required: Enter Date Range From: 01-Sep-2024 To: 31-Dec-2024

Run as ☐ Preview ☐ Print ☒ PDF ☐ Excel

If Printing use Duplex ☒ Yes ☐ No

Lookup OK Cancel Clear All

The numbers shown in this image match those in the table below, which detail the report's elements.

10863-HBCLOSINGRPT.REP Printed 07-Oct-2024 at 16:16:02 by THERESA Heritage Village Master Association Resales set to Close within Date range Page 1

1	2	3	4	5	6	7	8	9
Unit#	Condo#	Type	Close Date	Seller	Buyer	Status	Sent On	Closed On
Resale Closings prior to Today								
1000A	20	COUNTRY HOUSE	01-Oct-2024	DAVID JONES	TED LASSO	Active	19-Sep-2024	19-Sep-2024
1000A	20	COUNTRY HOUSE	01-Oct-2024	STEPHEN STILLS	JAMES DEYANEY	Active	30-Sep-2024	30-Sep-2024
1003B	20	COUNTRY HOUSE	01-Sep-2024		Jimmy S Dean	Active	25-Aug-2024	05-Sep-2024
400B	09	HERITAGE	01-Oct-2024		James Q Jones	Active	03-Sep-2024	
504B	13	CARRIAGE	25-Sep-2024	KEITH ERWIN	ACE ZIPFY	Active	09-Sep-2024	
# Closings: 5								
Resale Closings in the next 30 days								
1007A	20	COUNTRY HOUSE	01-Nov-2024		Teddy Flipper	Active	04-Sep-2024	04-Sep-2024
42C	02	ETRAN	01-Nov-2024		Buyers name 1	Active	04-Sep-2024	
# Closings: 2								
Resale Closings more than 30 days								
1001B	20	BEPP-1	15-Nov-2024	SEAN LENNON	JOHN SMITH	Active	03-Oct-2024	
1001B	20	BEPP-1	01-Dec-2024	SEAN LENNON		Active	30-Sep-2024	30-Sep-2024
124A	04	COUNTRY HOUSE	01-Dec-2024		Let Go a Walzing matilda with me	Active	02-Sep-2024	02-Sep-2024
618A	16	BEPP-1	15-Nov-2024		Jim A Harden	Active	09-Sep-2024	
42D	02	ETRAN	01-Dec-2024		Another Attempt to make it good	Active	04-Sep-2024	
920B	21	HANDBOOK	15-Nov-2024		David Smith	Active	08-Sep-2024	08-Sep-2024
# Closings: 6								
Selection Legend:								
Date Range: 01-Sep-2024 to 31-Dec-2024								
13								

Table 4

Column Label	Description/How used
1 Unit#	The Unit # of this condominium unit – also known as customer number
2 Condo#	The Condo # for this unit type. See the MB–632 HVMA Condominium Documents Table Setup guide in the Help Reference Library for more information about Condo #.



Column Label	Description/How used
3 Unit Type	The Unit Type corresponds to the Class Type defined in the Class Type table. See the MB–632 HVMA Condominium Documents Table Setup guide in the Help Reference Library for more information about Condo #.
4 Close Date	The closing date stated at the start of the resale process
5 Seller Name	The name(s) of the seller(s) as shown in the database
6 Buyer Name	The name(s) of the buyer(s) as entered when the resale process was started
7 Status	The status shows as “Active” if the customer maintenance record has not been marked as “Closed” for this sale
8 Resale Sent On	The date the Resale packet was sent out to the buyer & agents & attorneys
9 Closing Sent date	The date that the closing packet was sent to the buyer & agents & attorneys
10 Resale Closing prior to Today	This section lists the closing dates for transactions that are still active, but have a closing date prior to the date the report is run
11 Resale Closings in the next 30 days	This section lists the closing dates for transactions that have a closing date within the next 30 days
12 Resale Closings more than 30 days	This section lists the closing dates for transactions that have a closing date beyond the next 30 days
13 Selection Legend	This shows the date range that was entered on the prompt when the report was run

1.5 Percentage of Rental Units Report #10864

This report can be generated as a ☐PDF or ☐Excel file. It provides a quick overview to help assess eligibility requirements for specific federal agencies.



The report shows the total number of units in the association, the number of units that have ever been lease, with a percentage, and

10864-MBRENTPCTRPT.REP		Printed 07-Oct-2024 at 16:31:30	Page 1
		Heritage Village Master Association	
		Percentage of Rental Units	
Total # Units	:	2,580	
#Units that have been leased (past or present)	:	401	15.54 %
#Units that have an active lease	:	200	7.75 %
#Units with expired leases	:	201	7.79 %

The numbers in the image correspond to the explanation in the table below.

Leasing_Percent_10864_THERESA[1].xml - Excel			
File Home Insert Page Layout Formulas Data Review View Help			
112 : X ✓ fx			
	A	B	5 D
1	Description	Counts	PCT%
2	Total # Units	2,580	
3	#Units that have been leased (past and p	401	15.54
4	#Units that have an active lease	200	7.75
5	#Units with expired leases	201	7.79
6			

Table 5

Row Label	Counts	PCT%
1 Description#	This line describes each of the counts	
2 Total # of Units	This is the total number of units in the association	(no % shown – nominally, the total is 100%
3 Leased Units	This is the number of units that have ever been leased, past or present	
4 Close Date	This is the number of units with a currently active lease	
5 Seller Name	This is the number of units with expired leases	



1.6 List of Active Leases Report #10865

This list of Active leases may be run as either
☐PDF or ☐Excel.

Task 10865: List of Active Leases

List of Active Leases

Run as ☐ Preview ☐ Print ☒ PDF ☐ Excel
If Printing use Duplex ☒ Yes ☐ No

Lookup OK Cancel Clear All

10865-MBCUSACTRENT.REP

Printed 07-Oct-2024 at 16:50:06 by
Heritage Village Master Association
List of Active Leases

Page 1

1

2

3

4

5

6

7

Unit#	Lease Start	Lease End	Owner Name	Renewal Sent	By	Lease Ends in
1000B	01-Jan-2024	31-Dec-2024	SEAN LENNON	07-Oct-2024	THERESA	85 Days
1001B	01-Sep-2024	31-Aug-2025		19-Sep-2024	THERESA	328 Days
1002A	01-Jan-2000	31-Dec-2999		CONVERT	Life Tenant	
1005A	01-Jan-2000	31-Dec-2999		CONVERT	Life Tenant	
1006B	31-Oct-2024	01-Nov-2025		06-Sep-2024	ANTHEA	390 Days
1023B	01-Dec-2024	01-Dec-2025		ANTHEA	420 Days	
1023B	23-Oct-2023	31-Oct-2024		CONVERT	24 Days	
1025A	01-Dec-2024	01-Jan-2026		ANTHEA	451 Days	
1027A	01-Jan-2000	31-Dec-2999		CONVERT	Life Tenant	
1028A	01-Sep-2024	31-Aug-2025		ANTHEA	328 Days	
102B	01-Nov-2024	01-Nov-2025		ANTHEA	390 Days	
1030B	01-Nov-2024	31-Oct-2025		05-Sep-2024	ANTHEA	389 Days
103E	31-Oct-2023	30-Nov-2024		07-Oct-2024	THERESA	54 Days

Total # Active Leases: 202

8

The numbered items correspond with the numbers in the table below that describes the columns on the report.

ActiveLeases_10865_.xml - Excel

1	2	3	4	5	6	7
A	B	C	D	E	F	G
Unit#	Lease Start	Lease End	Owner Name	Renewal Sent By	Lease Ends in	
1000B	1/1/2024	12/31/2024	SEAN LENNON	10/7/2024	THERESA	85 Days
1001B	9/1/2024	8/31/2025		9/19/2024	THERESA	328 Days
1002A	1/1/2000	12/31/2999			CONVERT	Life Tenant
1005A	1/1/2000	12/31/2999			CONVERT	Life Tenant
1006B	10/31/2024	11/1/2025		9/6/2024	ANTHEA	390 Days
1023B	12/1/2024	12/1/2025			ANTHEA	420 Days
1023B	10/23/2023	10/31/2024			CONVERT	24 Days
1025A	12/1/2024	1/1/2026			ANTHEA	451 Days
1027A	1/1/2000	12/31/2999			CONVERT	Life Tenant
1028A	9/1/2024	8/31/2025			ANTHEA	328 Days
102B	11/1/2024	11/1/2025			ANTHEA	390 Days
1030B	11/1/2024	10/31/2025		9/5/2024	ANTHEA	389 Days
103E	10/31/2023	11/30/2024		10/7/2024	THERESA	54 Days
1040A	11/30/2023	11/30/2024		10/7/2024	THERESA	54 Days
1041B	7/15/2024	7/14/2025			CONVERT	280 Days
104B	1/1/2025	6/1/2025			ANTHEA	237 Days
Total # Active Leases:				8	202	

Table 6

Column Label	
1 Unit#	The unit number, also referred to as Customer number
2 Lease Start	The date the lease began. If the lease start shows as 1/1/2000, it indicates that this is a "Life Lease" that will not expire until the demise of the current tenant.



Column Label		
3	Lease End	The ending date of the lease – when it will expire. If the expiration date is 12/31/2999, the lease never expires, and is called a Life Tenancy
4	Owner Name(s)	The name(s) of the owner(s) of the unit
5	Renewal Sent	The date the renewal for the lease was sent
6	By	The user who sent the renewal for the lease. If the column has the word “CONVERT” the lease has not been sent for renewal but rather has stayed the same without any activity since activating the module in AUC.
7	Lease Ends In	This shows the number of days until the lease ends. If it will never expire, “Life Tenant” is shown for this unit #
8	Total # Active Leases:	This shows the Total number of currently active leases.

DRAFT