



**Fanatically Functional**  
**Supremely Secure**  
**Astoundingly Affordable**

# **Community Website Support**

**Quick Reference Guide**

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## Section 1: Welcome To HOATown Version 3.1

### 1:2 Introduction

Welcome to HOATown Version 3.1, the latest and greatest evolution in community communication and information management. Our new and improved software provides you with the most functional and flexible community website solution on the market. Our easily customizable platform features 24 available Modules, the ability to create up to 15 custom Web Pages and an unlimited number of Sub Pages, plus loads of additional exciting features.

### 1:2 Logging In To Your Community Website

To Login as the Website Administrator, click the Admin Login link on the Website Footer. Next, enter your Admin User Name and Password and click the Login button. If you have forgotten your login information, use the "Forgot Your Login?" link on the Admin Login page.

### 1:3 The Admin Dashboard

Once you have logged into your website, you will be redirected to your Dashboard, which is the control center for your HOATown Community Website. The Admin Dashboard is divided into two sections, the Setup Menu and the Management Menu.

**The Setup Menu** allows you to perform all general tasks related to setting up your profiles, customizing the appearance of your website, preparing the member profile form, creating the member registration code, adding new web pages and sub pages, adding subdivisions, creating member groups, and setting up the Contact Us feature.

**The Management Menu** allows you to perform all tasks related to website content management, security, sharing of website administrative privileges, member profile management, and general internal and external communication.

### 1:4 Ten Tasks For Getting Started

Once you have had some time to click through the Admin Dashboard and experience all your website has to offer, complete the following ten tasks to prepare your website for launch:

#### 1. Update Profiles

Click Dashboard > Update Profiles and immediately update both your Admin and Billing profile. It is critical that you keep this information current at all times, as it is used to issue important updates and notices as well as all billing related communications.

#### 2. Customize Website Header

The first step in changing your website design is to customize the header. To do this, click Dashboard > Customize Website Design. If you have designed a header for your website and saved the image to your computer, click Upload Custom Header. Otherwise, click Customize Stock Header to change the color scheme of the default header, add your community name and slogan, and upload a logo or other image to complement the header design.

### 3. Select Website Colors

The next step in customizing your website design is to choose colors for various other website elements. To do this, click Dashboard > Customize Website Design > Change Website Colors. From here, you can change the colors related to four different areas: the Top Navigation Menu, Left Navigation Menu, Website Body, and Website Footer. Using the provided color pallet or by entering the hexadecimal color codes of your choice, you can change the background colors, font colors, and rollover colors to achieve the look and feel you desire.

### 4. Customize Member Profile Form

After your website has been launched, newly registering members will be required to complete a member profile form. By clicking Dashboard > Customize Member Profile Form, you can choose the fields you wish to populate on this form. Only those fields marked with a red asterisk will become required fields if you opt to add them to your member profile form.

### 5. Create Member Registration Code

Newly registering members will be prompted for a Member Registration Code in order to validate and complete their website registration. This code is important, as it prevents non-residents from gaining access to your website. Click Dashboard > Create Registration Code in order to create a unique alphanumerical registration code to share with all prospective members.

### 6. Add Subdivisions

If your community has subdivisions and you would like the ability to filter the member roster by subdivision, click Dashboard > Add/Manage Subdivisions. Members will be required to select their subdivision when completing their member profile. **Note:** In order to use the Subdivisions tools, Subdivisions must be activated on the Member profile form (see 4 above).

### 7. Create Groups

Like Subdivisions, groups can be used to filter the member roster in both the Member Directory and Email Members tool. To add groups, click Dashboard > Create/Manage Groups. Once a group is created, you will be able to add and remove registered members from those groups OR allow members to join groups that are not designated "Admin Only." Examples of groups are Board Members, Tennis Team, Garden Club, etc.

### 8. Add Contact Us Emails

Adding a Contact Us Email and making it's status "Active" will cause a Contact Us link to appear on the website footer. Visitors to your website will use this regarding registration or other community related inquiries. To add Contact Us Emails, click Dashboard > Add/Manage Contact Us Emails. You can add and activate as many email addresses as you wish.

### 9. Select Modules You Wish To Use

By clicking Dashboard > Manage Website Content > Modules, you can review a list of available modules on your website, decide which modules you wish to use, and hide those you do not wish to use. To hide a module, click the "Hide" link in the respective module row. Once complete, click the "Organize Left Navigation Links" button at the bottom of the page to determine the order in which the links appear on your website's left navigation menu.

### 10. Determine Login Required Modules

You have the ability to determine which modules on your website will require login and which will be viewable by the public. To do so, click Dashboard > Manage Security > Login Required, then select the checkboxes of those modules you wish to be Login Required.

**Congratulations!** You are well on your way to experiencing the greatest evolution in online community communication and information management. Now, it's time to begin adding content to your modules, add your custom web pages and sub pages, and learn more about the robust functionality and flexibility of your HOATown community website.

## Section 2: Dashboard – Setup Menu

### 2:1 Update Profiles

The "Update Profiles" feature allows you to update your Admin and Billing Profiles. Since this information is used for all communication with HOATown, it must be kept current at all times.

- [Admin Profile](#) – Click "Admin Profile" to update your Admin Profile and change your Password. If you would like to change your Admin User Name, please click Dashboard > Website Statistics and Support > Contact Support.

***Tip:** The Email "From" Description you enter is used to construct the "From" header when Emailing members and groups using the Internal or External Email Members tool.*

- [Billing Profile](#) – Click "Billing Profile" to update your Billing Profile. Once updated, HOATown will receive an email notification and update your billing records.

### 2:2 Customize Website Design

The "Customize Website Design" feature allows you to change the look and feel of your website by uploading or creating a header, changing website colors, and organizing all published module and Web Page links. Below is a description of how to use each customize feature:

- [Upload Custom Header](#) – You easily upload a custom header to your HOATown website. The design specifications are as follows: Width: 960px, Height: Variable, File Type: JPG or GIF, Format: RGB, Size Limit: 300k. Once you have saved the image file to your desktop, simply browse and Submit to instantly replace the stock header with your custom header.
- [Customize Stock Header](#) – There are two steps to changing the appearance of the stock header. First, define the the top border, background, and bottom border colors. You may use the provided web safe color pallet or enter your desired hexadecimal color code. When complete, click Submit. Next, Add Header Content by completing the provided form for Community Name and Slogan, then click Submit.
- [Change Website Colors](#) – To maximize the customization of your website design, we have divided Website Colors into four sections: Top Navigation Menu Buttons, Left Navigation Menu Buttons, Website Body, and Website Footer. Use the provided web safe color pallet or enter the desired hexadecimal color code for each website element. You must click Submit under each section to effect the desired changes.

***Tip:** Each time you change website colors, the page will refresh so you can review your selections. Be sure the Footer Background and Font are not the same color, or you will not be able to see important links that reside on the website footer.*

- Organize Left Navigation Links – The Module and Web Page links displayed in the Left Navigation Menu can be reorganized with this tool. Move selected links up or down until the desired order is achieved, then click Submit to effect the changes. Note: Only published Modules and Web Pages will display in the Organize Left Navigation Links menu.

### 2:3 Customize Member Profile Form

The “Customize Member Profile Form” feature allows you to customize the all-important Member Profile Form and in turn, the New Member Registration Form. Select the checkboxes of the fields you wish to populate on the form. Unchecked fields will not appear on the form.

- Member Information – Gender, First Name, Middle Initial, Last Name and Email are required fields. The Member Email Address will be used for all communication initiated by the Site Administrator. Be sure to keep this Email Address current at all times.
- Spouse/Partner Information – Gender, First Name, Middle Initial, Last Name are required fields. It is recommended that you select the optional Email Address, as the spouse/partner might also wish to receive community related communication. This is particularly important if the spouse/partner is a member of any designated groups. (See 2:7)
- Primary Home Information – Street Address, City, State, Zip/Postal Code are required fields. If you select Owner/Renter or Subdivision, these will become required fields and a related filtering tool will populate in the Directory and the Internal and External Email tools.
- Secondary Home Information – This information is useful for resort communities that are inhabited by residents who have a primary residence elsewhere. All fields are optional and are will not become required fields for members if selected.
- In Case Of Emergency – This information is useful if you wish to gather Emergency Contact Information for member residents. All Emergency Contact fields are optional and will not become required fields when selected.
- Miscellaneous – The Upload Member Photo tool is purely optional and allows members to upload a personal photo that will populate on their profile in the Directory.

**Tip:** *It is critical that you customize the Member Profile Form before accepting new member registrations. You can edit this form at any time, but it is the member's responsibility to update their profile and complete any newly added fields.*

### 2:4 Create Member Registration Code

Newly registering members are required to enter a Registration Code when they create their member profile. The Registration Code field appears at the bottom of the New Member Registration form. This code prevents non-residents from creating a profile and gaining access to your community website. To create the Registration Code, enter the code and click Submit.

**Tip:** *To view the New Member Registration Form, logout as Admin, click the Member Login link, and then click “Need to Register?”*

## 2:5 Add Web Pages/Sub Pages

The “Add Web Page/Sub Pages” feature allows you to add a custom Web Page or Sub Page to your website. Once created, you will have total control over the content of these Web Pages and Sub Pages, which is easily added using our built in content editor. Web Page links are displayed on Left Navigation under the Modules. Sub Pages (often described as pages within a page) must be linked to from an existing Web Page, using the URL as the destination. (See 3:1)

- [Add Web Page](#) – Select “Web Page” as Link Type from the menu, name the link and click Submit. You will be redirected to the Manage Web Pages module (See 3:1) where you will be able to edit the content of the newly created Web Page. By default, all newly created Web Pages are unpublished and thus will not display on Left Navigation.
- [Add Sub Page](#) – Select “Sub Page” as Link Type from the menu, name the link and click Submit. You will be redirected to the Manage Web Pages module (See 3:1) where you will be able to edit the content of the newly created Sub Page. All Sub Pages have a unique address (URL) that can be used as a destination for linking to it from another page.

**Tip:** You can add up to 15 additional Web Pages and an unlimited number of Sub Pages. This allows for robust website flexibility in terms of space for all desired content. After adding a Web Page or Sub Page, you will be redirected to the respective management page, where you will be able to View the URL, Publish or Hide, Edit, and Delete.

## 2:6 Add/Manage Subdivisions

The “Add/Manage Subdivisions” feature allows you to add, view and delete Subdivisions to your website. This is a useful feature for community’s that contain multiple subdivisions and wish to be able to filter their member resident list by Subdivision. When Subdivisions is enabled (See 2:3), the Subdivision filtering tool will appear in the Directory, Admin Member Directory, and Email Members tool. Members will also be required to select their subdivision when editing their Member Profile.

**Tip:** The Subdivision filter will not populate on the website in any related module or tool unless the “Subdivisions” field is activated by selecting the appropriate checkbox on Manage Member Profile Form. (See 2:3)

## 2:7 Create/Manage Groups

- [Groups](#) – By creating Groups and assigning members or allowing members to join those groups, you can better manage your Address Book, Admin Member Directory and Admin Email Members tool. Additionally, members will enjoy the ability to find other community members who share similar interests by using the Group Filter in the Address Book. To add a new Group, click “Add New Group.” You can create two types of groups, a Standard Group and an Admin Only Group, as described below:

*Standard Groups* – By leaving the Admin Only box unchecked when creating a new group, you are allowing members to join this group. As such, this group will display on the Member Dashboard > Join/Manage Groups. Standard groups are typically used to represent interests. (Ex. Tennis, Golf, Bunko)

*Admin Only Group* – By checking the Admin Only box when creating a new group, you are preventing members from being able to join this group. As such, it will not display on the Member Dashboard > Join/Manage Groups. Admin Only groups have defined memberships and cannot be joined by other members. (Ex. Board Members, Committees and Clubs)

***Tip:** As Groups are created, a Group Filter will appear in the Directory, Admin Member Directory and Email Members Tool. All groups will be displayed in the menu, so that admin and members alike can easily identify members of particular groups.*

## 2:8 Add/Manage Contact Us Emails

The “Add/Manage Contact Us Emails” feature allows you to add Contact Us Email Addresses to your website. When a Contact Us Email Address is added and designated as Active, the Contact Us link will appear on the website footer. This link allows visitors to your website to email all designated addresses their website or community related inquiries.

- Add Email – To add a Contact Us Email, click the “Add Email” button, enter the desired Email Address and click Submit. Newly added Contact Us Email Addresses are Active by default, meaning they will receive all Contact Us Emails.
- Status – The Status column shows whether a Contact Us Email Address is Active (receiving emails) or Inactive (not receiving emails). To activate or inactivate a Contact Us Email Address, click the Edit link, change the status, and click Submit. To delete a Contact Us Email Address, click the Delete link.

***Tip:** All Email Addresses with a status of “Active” will receive an email when the “Contact Us” link on the footer is used.*

## Section 3: Dashboard – Management Menu

### 3:1 Manage Website Content

The “Manage Website Content” tool is your content management control center. It contains lists of all available Modules (based on your website package), all created Web Pages and Sub Pages, and all files and images uploaded to the server via the web page content editor. (See Section 6)

- Modules – This table contains columns for Release, Module Name, URL, Action, and Edit.

*URL* – In the URL column, click “View” to display the Module Address (URL) in a new window. Be sure all pop-up blockers are disabled. Copy this Address in order to use as a destination for linking from a Web Page.

*Action* – In the Action column, click the “Publish” or “Hide” link to publish or hide a module. Published Modules will appear on the website Top or Left Navigation Menu in the designated location.

*Edit* – Click the “Edit” link to add/edit/delete content for the designated module. This link is most useful for editing content for those Modules that have not yet been published to the website.

**Tip:** When logged in as Admin, you can edit module content directly from this page OR by clicking on the published module in Top or Left Navigation.

- Web Pages – This table contains columns for Date Created, Web Page Name, URL, Action, Edit, and Delete.

*Date Created* – Displays the date that the respective custom web page was created.

*URL* – In the URL column, click “View” to display the Web Page Address (URL) in a new window. Be sure all pop-up blockers are disabled. Copy this Address in order to use as a destination for linking from a Web Page.

*Action* – In the Action column, click the “Publish” or “Hide” link to publish/hide a Web Page. Published Web Pages will appear as links on Left Navigation.

*Edit* – Click the “Edit” link to add/edit/delete content for the designated Web Page. This link is most useful for editing module content for those Modules that have not yet been published.

*Delete* – Click the “Delete” link to permanently delete a Web Page. The system will generate an alert in order to confirm the deletion.

**Tip:** When logged in as Admin, you can edit Web Page content directly from this page OR by clicking on the published Web Page, then clicking the “Edit Content” button.

- Sub Pages – This table contains columns for Date Created, Sub Page Name, URL, Edit, and Delete.

*Date Created* – Displays the date that the respective custom web page was created.

*URL* – In the URL column, click “View” to display the Sub Page Address (URL) in a new window. Be sure all pop-up blockers are disabled. Copy this Address in order to use as a destination for linking from a Web Page.

*Edit* – Click the “Edit” link to add/edit/delete content for a particular Sub Page. This link is most useful for editing module content for those Modules that have not yet been published.

*Delete* – Click the “Delete” link to permanently delete a created Sub Page. You will receive an alert in order to confirm the deletion.

**Tip:** When logged in as Admin, you can Edit Sub Page content directly from this page OR by browsing to the published Sub Page, then clicking the “Edit Content” button.

**General Tip:** Keep Modules and Web Pages for which you are adding content unpublished until all the content has been added. This prevents members from viewing uncompleted Modules or Web Pages that are in the process of being created. Once you are finished editing the content, publish them and organize them using the Organize tool. (See 2:2)

- [Uploaded Files](#) – This page displays a list of all files that have been uploaded to the server from a custom web page using the content editor. From here, you can select and permanently remove unwanted files from the server. **Note:** Be sure to remove any active links to these files from your custom web pages before deleting.
- [Uploaded Images](#) – This page displays a list and thumbnail of all images that have been uploaded to the server from a custom web page using the content editor. From here, you can select and permanently remove unwanted images from the server. **Note:** Be sure to remove any active links to these images from your custom web pages before deleting.

### 3:2 Manage Website Security

The Manage Website Security feature allows you to determine which Modules, Web Pages and Sub Pages on your community website are Login Required and/or Passcode protected.

- [Login Required](#) – Check the boxes of the Modules, Web Pages and Sub Pages you wish to be Login Required. Only members with a valid user name and password who are logged into the website will be able to access the selected pages. Individuals who are not logged in will be prompted to login when they click on any of the Login Required links.

***Tip:** It is recommended that any Module, Web Page or Sub Page containing sensitive or private community information be set as Login Required.*

- [Passcodes](#) – Passcodes offer a second tier of security for Modules and Web Pages that you wish to be accessed by a select group of registered members. By assigning a Passcode to a particular module or Web Page, only members who possess this Passcode will be able to access that module or page. Clicking on that module or Web Page when logged in will prompt a pop up window requesting the Passcode.

***Tip:** Passcodes are best used on a Module or Web Page that you wish to restrict to a select group of registered members. (Ex. Board Members, Club or Committee members)*

- [Global User](#) – A Global User Name and Password is used to allow anyone with the credentials to gain “View Only” access to the website. While not often used, this option is useful to share with individuals who are not registered users and who you wish to offer temporary access. Global Users will not be able to use Modules that require membership nor will they be able to receive any administrative privileges.

### 3:3 Share Website Privileges

The “Share Website Privileges” feature allows you to share the administration of the website with other registered members. These members will never gain access to the Admin Dashboard, but rather will receive access to the administrative tools for any and all assigned Modules, Web Pages, or Sub Pages. Admin also has the ability to assign optional Internal Email Privileges and Special Admin Privileges, as described below.

***Important Tip Regarding Classifieds and Forum:** To allow members to post to the Classifieds and Forum, you do NOT assign privileges. Rather, for those modules, you assign what are called “Rights”. Rights are assigned by clicking the Classified and Forum Modules on Top Navigation, then clicking “Assign Rights.” (See 4:6 and 4:7)*

## Privilege Categories

- Module Privileges - Members with privileges for a particular module will have access to the designated Admin Tools for that module upon logging in as a member. You can assign either Add or Admin privileges, depending on the module.

*Add* - Allows the member to have access to the Add tool, which allows them to add entries to the selected module and edit their own entries only.

*Admin* - Allows the member access to all Admin Tools, including the ability to edit and delete all module entries.

**Tip:** *Certain Modules were designed to be administered ONLY by the designated or shared administrator and as such, only offer the Admin Privilege.*

- Web Page Privileges - Members with privileges for a Web Page will have access to the "Edit Content" button on that Web Page upon logging in as a member. For Web Pages, you can assign the Edit/Delete function only.

*Edit/Delete* - Allows the member access to the admin tools for the selected Web Page. Clicking this link opens the editor, which allows the member to add, edit and delete the content of this Web Page.

- Sub Page Privileges - Members with privileges for a Sub Page will have access to the "Edit Content" button on that Sub Page upon logging in as a member. For Sub Pages, you can assign the Edit/Delete function only.

*Edit/Delete* - Allows the member access to the Edit Page link for the selected Sub Page(s). Clicking this link opens the content editor, which allows the member to add, edit and delete the content of this Sub Page.

- Internal Email Privileges - This optional tool allows you to assign Internal Email to members. Members with this privilege will be provided an Internal Account that functions very similarly to conventional email, containing an Inbox, Sent, Trash, and the ability to send internal messages to other members who have also been assigned this privilege. This feature is purely internal and does not use an External Email Address to deliver messages. As such, members using this system must login to the website in order to check and manage their community email. **Note:** You can only assign the Internal Email privilege to the primary member. However, doing so will create an account for both the primary and secondary member.
- Special Privileges - This unique module allows you to share access to two tools that are otherwise reserved exclusively for the Administrator: the Admin Member Directory (See 3:4) and the Admin Email Members tool. Members with Special Privileges for one or both of these tools will be able to access them directly from a Special Privileges table that will appear on their Member Dashboard.

**Tip:** Each special privilege can be assigned to a maximum of three members. An example of a person who might be assigned access to the Member Directory is a security guard at a controlled access condominium. An example of someone who might be assigned access to the Admin Email Members tool is a Board Member who would like to assist in sending out general, external communications to registered members and groups.

## Assigning Privileges

Each Privileges page contains three, identical columns for executing all tasks related to assigning and viewing website privileges. Below is a description of each column's functions.

- Group Assign – The “Group Assign” tool allows you to assign identical privileges to a group of members (perhaps all members) simultaneously. You must first select the members from the populated member list and click Submit in order to select and assign the desired Privileges. Since the member and Spouse/Partner share a login, only the primary member name will display in the member list.

**Tip:** Any time you execute a Group Assign, it deletes out all previously assigned privileges for the selected members and assigns ONLY the privileges you have selected with the Group Assign tool. If one or more of those members has additional privileges, you must use the View/Assign tool (see below) to assign those additional privileges independently.

- View Only – The “View Only” tool allows you to view assigned member privileges for a particular Module, Web Page, Sub Page, or special Admin tool.
- View/Assign – The “View/Assign” tool allows you to both View current privileges and Assign privileges for a specific member.

## 3:4 View Member Directory/Export Data

The “View Member Directory/Export Data” feature allows you to manage your registered website members and execute related member functions.

### Admin Member Directory Features

The Admin Member Directory looks similar to the general Directory (accessible from Top Navigation), but is actually quite different and offers a number of additional “Admin Only” tools. Furthermore, the Admin Member Directory does NOT take into consideration individual Member Privacy Settings, meaning that you will have access to complete member profiles. As such, you should exercise discretion when accessing and utilizing this member information in any way.

- Quick Search and Filter Tools

*Quick Search* – Select from the menu of available search options (Name, Address, Lot Number, Boat Slip Number, Apt/Suite, Unit Number) and enter the word or characters you wish to search, and then click Search.

**Tip:** Only those fields whose checkbox is selected on “Customize Member Profile Form” will appear as an option in the Quick Search menu. (See 2:3)

*Filter By Status* – If Owner/Renter is activated (See 2:3), then the Owner/Renter Status filter will appear in the Admin and Member Directory.

*Filter By Subdivision* – If Subdivision is activated (See 2:3), then the Subdivision Filter will appear in the Admin and Member Directory.

*Filter By Gender* – Since Gender is a required field for both member and spouse/partner, this filter is standard in the Admin and Member Directory.

*Filter By Group* – This filter is standard in the Admin and Member Directory and the option menu will populate as Groups are added. (See 2:7)

*Alphabet Tool* – Click on a letter of the alphabet to display only members whose last name begins with that letter. Click All to display all members.

- Admin Member Directory Table

*Photo* – Allows you to view an uploaded member photo, if and only if the member has uploaded a photo. Members will not be able to upload photos unless the “Upload Member Photo” field is activated. (See 2.3)

*Last Login* – Will display the member’s date of Last Login. Only the Administrator will be able to view this information, meaning it is not displayed in the general Member Directory, accessible from Top Navigation.

*Member Name* – Unlike the Directory, which takes into consideration individual member Privacy Settings, all names in the Admin Member Directory appear as blue links, which when clicked will display the complete member profile.

*Primary Address* – Will display the member Primary Address as completed by the member in their member profile.

*Phone* – Will display the member Primary Home Phone Number as completed by the member in their member profile.

*Privileges* – This column contains shortcuts to View/Assign Module, Web Page, Sub Page, Special and Internal Email privileges for this member. (See 3:3)

*Status* – Contains links to Activate/Suspend members and Delete member profiles. Suspended members will not be able to login to the website until activated.

## **Editing Member Profiles**

To edit a member profile or reset a member password, click on the Primary or Secondary Member Name link to enter profile edit mode. Make the desired changes, then click Submit.

## **Export Member Data**

The “Export Member Data” feature allows you to export all member data to an XLS file (Excel Spreadsheet) or CSV file (Comma Separated Values). The exported file is useful for creating mailing labels, a printable directory, or for importing member data into another application, such as community accounting software.

**Important Tip Regarding Privacy:** Spreadsheets displaying exported Member Data will contain a column titled "Privacy" which will display the Member Privacy Setting. Remember that members designated as "Private," while viewable in the Admin Member Directory, are not viewable to the public in the general Directory. As such, if you are using the spreadsheet to create mailing lists or a printable directory, be sure to NOT publish information for those members designated "Private."

### 3:5 Email Members/Groups

The "Email Members/Groups" feature allows the Site Administrator to send and receive Internal and External communication to and from member residents. The Administrator will have an Inbox that will store all Internal Emails, a Sent folder showing both internal and external messages sent, and a Trash folder. There are two types of messaging tools:

- Compose Internal – Internal messages do not rely on an external email address to be sent and are placed in the Inbox of member residents who have the Internal Email privilege assigned. Admin can filter the populated member list using the filters before selecting the intended recipients. **Note:** Only members who have been assigned the Internal Email Privilege will be displayed as available recipients.
- Compose External – External messages are sent to the respective member's email address, as displayed on their member profile, and a copy is placed in the respective Inbox of those members who have the Internal Email privilege assigned. As such, intended recipients will be able to reply from their regular email or via Internal Email.

**Tip:** Internal Email was designed to give member residents an easy way to communicate with one another without divulging their personal email addresses. Additionally, this feature is intended to encourage increased use of the community website. Internal Email is a purely optional feature and some community administrators may not wish to use it. Remember, ONLY members that have been granted the Internal Email Privilege (3:3) will receive and be able to use the Member Internal Email feature.

### 3:6 Manage Online Request System (ORS)

The "Online Request System" eliminates the paper flow associated with resident requests made to the Board or Property Manager. All such requests can now be submitted, reviewed, voted on and archived online. Members who submit requests will be able to view the real-time status of their requests from their Member Dashboard. Members will also receive email notifications when the status of their submitted requests has changed.

#### Enabling/Disabling the ORS

By default, the ORS is enabled, meaning that an active button for Submit/Review Requests is displayed on the Member Dashboard. In order to disable the ORS, click the "Disable ORS" button. After confirming, the Submit/Review Requests button will disappear from the Member Dashboard and the "Disable ORS" button will now display as "Enable ORS."

## Create Request Types

Only the Site Administrator can create a Request Type and determine the voting rules for submitted requests of this type. When the ORS is enabled, the Member Dashboard will display a "Submit/Review Requests" button, which when clicked, will allow members to select a Request Type and then submit a request. Requests will be processed according to the rules designated by the Administrator when the Request Type is created. To create a Request Type, click the "Create Request Type" button and complete Steps 1-4, described below:

- Step 1: Filter Member List

A list of all member residents will populate so you may select reviewers for the Request Type. For Request Types that are reserved for review by a particular group, use the "Filter by Group" tool to display only the members in that group. This prevents you from having to scroll through the entire member list in order to find and select the reviewers.

- Step 2: Name Request Type

*Request Type Name* – The Request Type Name you assign will populate in the menu from which members will select when submitting a request. When naming a request, be as specific as possible. (Ex. Architectural Request)

*Description* – The Description you provide will populate when a member selects this Request Type when submitting a request. Descriptions are limited to 500 characters.

- Step 3: Assign Reviewer Rights

Reviewers are the individuals who will be reviewing and voting on submitted requests of this type. There are three types of Reviewers: Head, Voting and Read Only. All reviewers will receive an email notification of each submitted request and will be able to review and vote on that request from their Member Dashboard.

*Head Reviewer* – The Head Reviewer has the ability to review request details, vote, and change the status of a submitted request of this type (Statuses are Under Review, Need More Info, Approved, Declined). You may only select one Head Reviewer for each Request Type. The Head Reviewer is also responsible for closing all requests that have been approved or declined so they are permanently removed from the review process.

*Voting Member* – Voting Members have the ability to review request details and vote on submitted requests of this type. They will vote from the options selected in Step 4. You can select as many Voting Members as required for each request type.

*Read Only Member* – Read Only members only have the ability to review request details, but cannot vote on a request. You can select as many Read Only members as desired for each Request Type.

- Step 4: Define Voting Options

*Use Default Voting Options* – If you select this option, then voting members will select from Reviewing, Need More Info, Approve or Decline.

*Use Custom Voting Options* – If you select this option, then you can add up to ten (10) voting options in the text field, separating each with a comma. Voting members will then select from these options when voting on a request of this type.

## Viewing Request Types

On the Admin Toolbar, click “View Request Types” to display all your created Request Types. All Request Types are active and automatically displayed to all members as selections when they submit a request from their Member Dashboard. The table contains the following:

- Create Date – Displays the date and timestamp of the Request Type creation. The time displayed is based on the location of the HOATown server, which is subject to change.
- Request Type – Displays the name of the Request Type.
- Edit – Click Edit in order to change any of the details of this Request Type, including Name, Description, Reviewers and Voting Options.
- Delete – Click Delete in order to delete a Request Type. The system will not allow a Request Type to be deleted until the Head Reviewer closes all requests of this Request Type.

***Tip:** Deleting a Request Type renders this Request Type no longer available to members who are submitting requests. It will not, however, delete any previously closed requests of this type. All previously closed requests will remain in the Request History as well as the Member Archived Requests.*

## Request History

On the Admin Toolbar, click “Request History” to display the entire history of member requests. The Request History is viewable only by the Site Administrator and contains all previous submitted member requests of all request types. The system displays 50 requests per page. You have the ability to search for previous requests by a number of criteria:

- Request ID – Each submitted member request is assigned a unique ID. To find a request by ID, type it in the field provided and click Submit.
- Member – To view requests submitted by a particular member, select the member name from the menu and click Submit.
- Request Type – To view requests of a particular Request Type, select the Request Type from the menu and click Submit.
- Date Range – To view request submitted during a particular Date Range, click the calendar icon to select the desired dates and click Submit.

***Note:** All Filters work in concert, which allows you to search the Request History by multiple criteria. (Ex. Search for all member requests for a particular member and a particular date range) Select all criteria before clicking Submit. To reset all filters and display the entire Request History, click the Reset button or click “Request History” on the Admin Toolbar.*

### 3:7 Access Online Property Pay

HOATown no longer offers Online Property Pay.

### 3:8 Website Statistics and Support

- [Website Statistics](#) - The "View Statistics" feature allows you to view member Hit Statistics by module. From here, you can view Daily, Weekly, Monthly or Lifetime Hit Statistics. You can also view total unique visits since the site was created (sessions where a member has logged in using a valid ID).
- [Contact Support](#) - The "Contact Support" feature allows the Site Administrator to access the HOATown Online Support messaging tool. From here you can email HOATown Support regarding General Inquiries, Billing Inquiries, Technical Support, Comments and Suggestions, or to Change the Admin User Name.
- [Printable User Guide](#) - This feature allows you to download a printable HOATown Version 3.1 Administrator User Guide.
- [Video User Guide](#) - This feature allows you to view the Admin Video User Guide. Due to the frequency of platform updates, this feature is sometimes unavailable pending the completed production and uploading of updated videos.

### 3:9 Important Notices & Updates

The "Important Notices and Updates" button, located above the Dashboard, links you to the HOATown Administrator Notices & Updates page. This page contains details of past and current notices and updates relevant to your community website as well as links to emails previously sent to all client website administrators.

## Section 4: Standard Modules

The Standard Website Modules come with both the Basic and Plus Packages. Only those Modules that are published by the Site Administrator will appear on the website and are easily accessed by clicking the respective link. Modules that have been designated "Login Required" by the website Administrator will only be accessible to registered members with valid login credentials.

### 4:1 Home

The "Home" page is always public and the link always displays at the top of Left Navigation. To edit the Home page content, click the Home page link, and then click the "Edit Content" button in the upper right hand corner of the page. This will enable the content editor, which will allow you to add content, upload images and files, and create links to other pages and/or uploaded files.

## 4:2 Welcome

The “Welcome” page, if published, is displayed immediately after a Member logs into the website. The link will also appear on Left Navigation for repeat access by members. If the Welcome page is hidden or unpublished (See 3:1), it will not display after member login and will not be an available link on Left Navigation. The Welcome page is a great place to offer important reminders and critical announcements that you do not wish to be made available to the public.

## 4:3 Terms of Use

The “Terms of Use” module is ideal for those communities that wish to have members agree to a “Terms Of Use” when logging into the website. If the module is published, the “Terms of Use” link will be displayed on the website footer and members will be required to agree to the Terms of Use before logging in. If the module is unpublished, the Terms of Use link will NOT appear on the website footer and members will not be prompted to agree to the Terms of Use when logging in.

There are two ways to edit the “Terms of Use” content. If the module is unpublished, go to Dashboard > Manage Website Content > Modules and click the “Edit” link next to the Terms of Use module (See 3:1). If the module is published, you can also click the Terms of Use link on the footer, then click the “Edit Page Content” button in the upper right hand corner of the web page to reveal the content editor.

## 4:4 What’s New

The “What’s New” page displays all entries made to the website by the Site Administrator or member with privileges for a particular module. Each module’s Add page has an “Add to What’s New” feature that allows the person adding the entry to decide whether they want it to appear on “What’s New.” You can remove an entry from “What’s New” at any time by editing the module entry and deselecting the checkbox OR by deleting it directly from the “What’s New” module.

## 4:5 Directory

The “Directory” module is accessible from Top Navigation and contains member resident information as allowed by the individual member, according to their desired Privacy Setting. The Directory contains the following features for member use:

- [Quick Search and Filter Tools](#)

*Quick Search* – Select from the menu of available search options (Name, Address, Lot Number, Boat Slip Number, Apt/Suite, Unit Number) and enter the word or characters you wish to search, and then click Search.

**Tip:** Only those fields whose checkbox is selected on “Customize Member Profile Form” (See 2:3) will appear as an option in the Quick Search menu.

*Filter By Status* – If Owner/Renter is activated (See 2:3), then the Owner/Renter Status filter will appear in the Admin and Member Directory.

*Filter By Subdivision* – If Subdivision is activated (See 2:3), then the Subdivision Filter will appear in the Admin and Member Directory.

*Filter By Gender* – Since Gender is a required field for both member and spouse/partner, this filter is standard in the Admin and Member Directory.

*Filter By Group* – This filter is standard in the Admin and Member Directory and the option menu will populate as Groups are added. (See 2:7)

*Alphabet Tool* – Click on a letter of the alphabet to display only members whose last name begins with that letter. Click All to display all members.

- Directory Table

*Photo* – Allows you to view uploaded member photos, if and only if the member has uploaded a photo.

*Member Name* – Displays Member Name, if and only if the member has selected a privacy setting that allows their name to display in the Address Book. Member names that appear as blue links can be clicked to display the member profile as defined by the member.

*Primary Address* – Will display the member Address and Home Phone Number as completed by the member in their member profile.

*Phone* – Will display the member Primary Home Phone Number as completed by the member in their member profile.

## 4:6 Calendar

The “Calendar” module is accessible from Top Navigation. Only information entered by the administrator or designated member with Admin Privileges will display on this module. The Calendar table contains all entered events by name, time and category. To view complete event details, click the event name. To filter calendar events by month, day, year and category, use the filtering tools at the top of the table. To view a large scale, printable calendar in a new browser window, click the Printable Calendar button. To Print the Calendar, click the Print button.

### To Add/Edit/Delete Calendar Events

If you are the Site Administrator or a member who has been issued Admin Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- Add Event – If you have been granted the “Add” or “Admin” Privilege for this module, click Add Board Member on the Admin Toolbar, complete the simple form and click Add. To use the robust recursive functionality, select the Repeat checkbox for the event, enter the End Date, define the event reoccurrence details and click the Add button.
- Edit or Delete Events – If you have been granted the “Admin” privilege, you will also have the ability to edit or delete a Calendar event entry. To do this, click the event name and use the Edit or Delete buttons to execute the desired function.

**Tip:** When deleting recursive events, you can choose to delete the single occurrence or all occurrences. You cannot delete the original occurrence of a recurrent event.

## 4:7 Classifieds

The "Classifieds" module is accessible from Top Navigation. Only information entered by the administrator or designated member with privileges will display on this module. To view all the posted ads in a Classifieds Category, click on the Category name. To search the Classifieds, click the Search Classifieds button.

### Add/Edit/Delete Categories and Assign Rights

If you are the Site Administrator or a member who has been issued Admin Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add Category](#) – Click Add Category on the Admin Toolbar, enter the Category Name and click Submit.
- [Edit/Delete Categories](#) – Click Edit Categories to be able to change the name of a category or delete a category. You will receive an alert before confirming the deletion of a category. Deleting a category will delete all classified ads posted to that category.
- [Assign Rights](#) – Click Assign Rights on the Admin Toolbar to assign member rights. Only members with rights will be able to post to the Classifieds. Use the Check All or Uncheck All buttons to assign or remove rights for all members simultaneously.

### Posting Classified Ads

If you are a member with Rights (see below) to post to the Classifieds, the "Post Classified" button will be displayed. Members who do not see the Post Classified button have not been assigned Rights for this module. To Assign Rights, see above.

## 4:8 Forum

The "Forum" module is accessible from Top Navigation. To view all the posted topics within a particular Board, click on the Board name. To view all the posted message threads within a particular Topic, click on the Topic title.

### Add/Edit/Delete Boards and Assign Rights

If you are the Site Administrator or a member who has been issued Admin Privileges for this module, an Admin Toolbar will appear at the top of the page, which contains the following tools:

- [Create Board](#) – Click Create Board on the Admin Toolbar, enter the Category Name, a brief Description, select Default Rights, and click Submit.
  - Private* – When selecting Private as the default Rights, no existing or newly registered members will be automatically assigned Rights to access and post to this Board. When selecting Private, Rights must be issued manually.
  - Public* - When selecting Public as the default Rights, all existing and newly registering members will automatically be assigned Rights to access and post to this Board.
- [Edit Boards](#) – Click Edit Boards to be able to edit the name and default rights of a board, delete a board or assign rights. You will receive an alert before confirming the deletion of a board, since deleting a board will delete all posted topics and message threads.

- [Assign Rights](#) – Only members with rights to a particular Board will be able to post Topics and Messages to that Board. Click Assign Rights on the Admin Toolbar, and then click the Rights link for the desired Board. To assign identical rights for all boards simultaneously, select the checkbox beneath the table and click submit. Members will only be able to see the Boards to which they have been assigned rights. There is no View Only option.

### **Posting Forum Topics and Messages**

If you are a member with Rights to one or more Boards, the Post Topic and Post Reply buttons will be displayed. Click these buttons from the respective page to add a new topic and initial message or to post replies to existing Boards. Members who do not see these buttons have not been assigned Rights for this module. To Assign Rights, see above.

## **Section 5: Plus Package Modules**

Plus Package Website Modules are displayed on Left Navigation and can be easily organized using the Organize feature (See 2:2). Only those Modules that are published by the Site Administrator will appear on Left Navigation (See 3:1).

### **5:1 Area Links**

The Area Links module is accessible by clicking “Area Links” on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Area Link details, click on the Area Link name. To visit the respective website, click the Website link.

#### **To Add/Edit/Delete/Organize Area Links**

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Area Link](#) – Members who have been granted the “Add” or “Admin” Privilege for this module can Add and Edit their own entries.
- [Edit or Delete All Area Links](#) – Members who have been granted the “Admin” privilege will have the ability to add entries AND edit and delete all entries. To do this, click on the Area Link name and use the Edit and Delete buttons to execute the desired function.
- [Organize Area Links](#) – To organize the order of display for created Area Links, click Area Links on the Admin Toolbar, then click the Organize button, move the selected Area Link up or down and click Submit.

### **5:2 Advertisers**

The Advertisers module is accessible by clicking “Advertisers” on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Advertiser details, click on the Advertiser name. To visit the website, click the Website link.

#### **To Add/Edit/Delete/Organize Advertisers**

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Advertiser](#) – Members who have been granted the “Add” or “Admin” Privilege for this module can Add and Edit their own entries.
- [Edit or Delete All Advertisers](#) – Members who have been granted the “Admin” privilege will have the ability to add entries AND edit and delete all entries. To do this, click on the Advertiser name and use the Edit and Delete buttons to execute the desired function.
- [Organize Advertisers](#) – To organize the order of display for created Advertisers, click Advertisers on the Admin Toolbar, then click the Organize button, move the selected Advertiser up or down and click Submit.

### 5:3 Board Members

The Board Members module is accessible by clicking “Board Members” on Left Navigation. Only information entered by the administrator will display on this module. To view Board Member details, click on the Board Member name. To email a Board Member, click the Email link to open an email dialog box in your computer’s default email application.

#### To Add/Edit/Delete/Organize Board Members

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Board Member](#) – Members who have been granted the “Add” or “Admin” Privilege for this module can Add and Edit his or her own entries.
- [Edit or Delete All Board Members](#) – Members who have been granted the “Admin” privilege will have the ability to add entries AND edit and delete all entries. To do this, click the Board Member name and use the Edit and Delete buttons to execute the desired function.
- [Organize Board Members](#) – To organize the order of display for created Board Members, click Board Members on the Admin Toolbar, then click the Organize button, move the selected Board Member up or down and click Submit.

### ]5:4 Clubs

The Clubs module is accessible by clicking “Clubs” on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Club details, click on the Club name. To email a Club Chairperson, click the Email link to open an email dialog box in your computer’s default email application.

#### To Add/Edit/Delete/Organize Clubs

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Club](#) – Members who have been granted the “Add” or “Admin” Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Club](#) – Members who have been granted the “Admin” privilege will have the ability to add entries AND edit and delete all entries. To do this, click on the Club name and use the Edit and Delete buttons to execute the desired function.

- [Organize Clubs](#) – To organize the order of display for created Clubs, click Clubs on the Admin Toolbar, then click the Organize button, move the selected Club up or down and click Submit.

## 5:5 Committees

The Committees module is accessible by clicking “Committees” on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Committee details, click on the Committee name. To email a Committee Chairperson, click the Email link to open an email dialog box in your computer’s default email application.

### To Add/Edit/Delete/Organize Committees

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Committee](#) – Members who have been granted the “Add” or “Admin” Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Committee](#) – Members who have been granted the “Admin” privilege will have the ability to add entries AND edit and delete all entries. To do this, click on the Committee name and use the Edit and Delete buttons to execute the desired function.
- [Organize Committees](#) – To organize the order of display for created Committees, click Committees on the Admin Toolbar, then click the Organize button, move the selected Committee up or down and click Submit.

## 5:6 Documents

The Documents module allows you to create folders in which to store important documents. Members will be able to access these folders and download documents to their computer. If you are the Site Administrator or a member who has been issued Admin Privileges for this module, the Admin Toolbar will appear at the top of the page and a series of buttons will appear at the bottom of the “View Folders” page and “Folder Contents” page.

### The Admin Toolbar contains the following links:

- [Add Documents](#) – Allows you to upload documents to the selected folder.
- [View Documents](#) – Allows you to view uploaded documents in the selected folder.
- [View Folders](#) – Allows you to return to the folders page and see all created folders.

**Tip:** You can upload up to five files at once. For your own protection, it is highly recommended that you do not upload files that can be edited by members. PDF files are the preferred format.

### The View Folders page contains the following buttons:

- [Add New Folder](#) – Allows you to create a new folder. Name the folder (limit 30 characters) and click Submit. You will be redirected to the View Folders page where you will see all of your created folders.

- [Edit Folder](#) – Allows you to edit the name of an existing folder. Select the radio button of the folder you wish to edit, then click the Edit Folder button, change and Submit. You will be redirected to the View Folders page where you will see all of your created folders.
- [Organize Folders](#) – Allows you to organize the display of your created folders.
- [Delete](#) – Allows you to delete an existing folder and all the uploaded documents within that folder. Select the radio button of the folder you wish to delete, and then click Delete. You will be redirected to the View Folders page where you will see all your created folders.

**The Folder Contents page contains the following buttons:**

- [Organize](#) – Allows you to organize the display of uploaded documents in this folder.
- [Delete](#) – Allows you to delete selected documents from this folder. Select the checkbox of the document you wish to delete, then click the Delete button.

**Viewing Folder Contents/Downloading Files**

Click on the folder you wish to view, and you will be redirected to view that folder's contents. The table displays the following fields:

- [Date](#) – Displays the date the particular file was added to the folder.
- [File Name/Description](#) – Displays the name and/or description of the document.
- [Edit](#) – Allows you to edit the name of an uploaded document.
- [Download](#) – The Download link is always displayed to members and allows them to download the files to their computer.

**5:7 Facilities/Amenities**

The Facilities/Amenities module is accessible by clicking Facilities/Amenities on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Facility/Amenity details, click on the Facility/Amenity name.

**To Add/Edit/Delete/Organize Facilities/Amenities**

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page:

- [Add/Edit Facility/Amenity](#) – Members who have been granted the "Add" or "Admin" Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Facilities/Amenities](#) – Members who have been granted the "Admin" privilege will have the ability to add entries AND edit and delete all entries. To do this, click on the Facility/Amenity name and use the Edit and Delete buttons to execute the desired function.
- [Organize Facilities/Amenities](#) – To organize the order of display for created Facilities/Amenities, click Facilities/Amenities on the Admin Toolbar, then click the Organize button, move the selected Facility/Amenity up or down and click Submit.

## 5:8 Garage Sales

The Garage Sales module is accessible by clicking "Garage Sales" on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. Garage Sales will be displayed in order of date, with the most recent garage sale on the bottom. To sort the Garage Sale entries by date, click the underlined From and To headers.

### To Add/Edit/Delete Garage Sales

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Garage Sale](#) – Members who have been granted the "Add" or "Admin" Privilege for this module can Add and Edit his or her own entries.
- [Edit or Delete Garage Sales](#) – Members who have been granted the "Admin" privilege will have the ability to add entries AND edit and delete all entries. To do this, select the radio button for the desired entry and use the Edit and Delete buttons to execute the desired function.

## 5:9 Homes For Rent/Lease

The Homes For Rent/Lease module is accessible by clicking Homes For Rent/Lease on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Home For Rent/Lease details, including photos and description, click View Details. Homes For Rent/Lease are displayed by default in order of Price, from least expensive to most expensive. To sort from most expensive to least expensive, click Sort By Price.

### To Add/Edit/Delete Homes For Rent/Lease

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Home](#) – Members who have been granted the "Add" or "Admin" Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Homes For Rent/Lease](#) – Members who have been granted the "Admin" privilege will have the ability to add entries AND edit and delete all entries. To do this, click Homes For Rent/Lease on the Admin Toolbar, then click Edit or Delete to execute the desired function.

## 5:10 Homes For Sale

The Homes For Sale module is accessible by clicking "Homes For Sale" on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Home For Sale details, including photos and description, click View Details. Homes For Sale are displayed by default in order of Price, from least expensive to most expensive. To sort from most expensive to least expensive, click "Sort By Price."

### To Add/Edit/Delete Homes For Sale

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Home](#) – Members who have been granted the “Add” or “Admin” Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Homes For Sale](#) – Members who have been granted the “Admin” privilege will have the ability to add entries AND edit and delete all entries. To do this, click Homes For Sale on the Admin Toolbar, then click Edit or Delete to execute the desired function.

### 5:11 Lots For Sale

The Lots For Sale module is accessible by clicking “Lots For Sale” on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view a Lot For Sale details, including photos and description, click View Details. Lots For Sale are displayed by default in order of Price, from least expensive to most expensive. To sort from most expensive to least expensive, click Sort By Price.

#### To Add/Edit/Delete Lots For Sale

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Lot](#) – Members who have been granted the “Add” or “Admin” Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Lots For Sale](#) – Members who have been granted the “Admin” privilege will have the ability to add entries AND edit and delete all entries. To do this, click Lots For Sale on the Admin Toolbar, then click Edit or Delete to execute the desired function.\

### 5:12 Online Forms

The Online Forms module is accessible by clicking “Online Forms” on Left Navigation. This module allows members to complete and Submit forms created by the Site Administrator or by a member with Admin Privileges. Completed forms will be emailed to the designated recipients.

All created forms are displayed on the default Forms page, which also contain administrative tools for Arranging Form Fields, Editing the content of a Form, or deleting a form. You also have the ability to Organize the display of your forms by clicking the Organize button below the table.

#### Adding An Online Form

If you are the Site Administrator or a member who has been issued Admin Privileges for this module, an “Add Form” link will appear on the Admin Toolbar. After clicking Add Form, you must complete the three-step process in order to create the form elements. Keep in mind that you will not be arranging the form elements until you complete these three steps, so you should have a concept of everything you want on the form before you get started.

##### Step One: Name Form/Choose Recipients

- Enter Form Name – For example, Maintenance Request Form.
- Enter Description – Enter a description for this form and the instructions for completing it. These instructions will appear for members to review when completing a form.

- Enter Email Recipients – Enter the Email Addresses of the individuals you wish to receive this form after it has been completed and submitted by a member.

#### Step Two: Create Textual Fields, Drop Down Menus and Checkbox Menus

- Click “Add Textual Fields” to add a simple textual field to your form. The Name of the text box, for example, might be “First Name” and you may decide to accept between 5-50 characters in that text field. Next, create another text field, “Last Name”, and then another and so on. You can also decide to utilize a text box for a field that might be called, for example, “Comments”, which is a field that you might wish to offer more than a limited number of characters to offer comments.
- Click “Add Drop Down Menu” to add a simple drop down menu that you wish to allow members to select from. For example, the menu might be called “Number of Guests” and your desired Options might be “One, Two, Three, Four.” Such options should be added all at once, separated by a comma. If you need another drop down menu on your form, simply click the “Add Drop Down Menu” button again and create a second one.
- Click “Add Checkbox Menu” to add a simple checkbox menu that you wish to allow members to select ONE of several available options. Follow the same instructions as above.

#### Step Three: Add To What’s New

- Select the Checkbox if you would like this form to be added to the “What’s New” page, located on Top Navigation.

When you have completed these three steps, click the Next button to “Organize Form Fields.” At this juncture, you will be able to view a menu of all your created elements and move them up or down to create the desired hierarchy for your form elements. To see how your form looks, click the Preview button at any time. Continue to Arrange Fields and Preview before clicking Submit. Once finalized, your form will be available for use by members.

### **5:13 Online Polls**

The “Online Polls” module allows members to Vote on and View Results for up to twenty (20) Online Polls. All polls are displayed simultaneously on the Online Polls module and are Login Required by default. This insures that each household or login ID can vote only once on each poll, fulfilling the requirement of typical HOA and COA Covenants. When a member has voted on a poll, their vote will be remembered and displayed to them.

The default page for Online Polls contains a table displaying all created Poll questions and three columns that allow one to Vote, View Results, and Delete. Only the Administrator or a member with Admin Privileges will be able to view all of these links.

- Vote - Click the “Vote” link to enable the Voting mechanism. ONLY members can vote on a poll. The Administrator will be able to view the poll, but will not be offered radio buttons to select an option or a Vote button to submit a vote.
- View - Click the “View” link in order to view the current results of a particular poll. The Site Administrator also has the ability to view all poll results simultaneously by clicking the “View All Results” link on the Admin Toolbar.

- [Delete](#) - Click the "Delete" link in order to delete an existing poll. Polls cannot be archived, so once deleted, polls and their results are not recoverable.

### To Add Polls

If you are the Site Administrator or a member who has been issued Admin Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add Poll](#) - Click the "Add Poll" link on the Admin Toolbar. Then, select the Number of Answer Options you wish to include in this poll from the menu. You can select a maximum of five answers. Complete the Answer Options and click Submit. You will then be redirected to the View Polls page.
- [View All Results](#) – Click the "View All Results" link to view the results of all current polls simultaneously on a single page.
- [View Polls](#) - Click the "View Polls" link on the Admin Toolbar to view all current poll questions and access the Vote, Results, and Delete tools.

**Tip:** Only members can vote on polls and they can only vote once. They do so by logging in and clicking the Online Polls link. Please note that the Online Polls module must be published in order for members to access this page. (See 3: 1)

### 5:14 Pet Directory

The Pet Directory module is accessible by clicking "Pet Directory" on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. Pets are displayed with a photograph and all Pet Details. Use the Quick Search function to find a pet by name, address or phone number. Use the Filter to sort the Pet Directory by Dog, Cat, Lost, Found, Needs Home or Other.

### To Add/Edit/Delete Pets

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page with the following tools:

- [Add/Edit Pet](#) – Members who have been granted the "Add" or "Admin" Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Pet](#) – Members who have been granted the "Admin" privilege will have the ability to add entries AND edit and delete all entries. To do this, click Pet Directory on the Admin Toolbar, then select the radio button for the desired Pet and use the Edit and Delete buttons to execute the desired function.

### 5:15 Photo Galleries

#### To Create/Edit/Delete/Organize Photo Albums

If you are the Site Administrator or a member who has been issued Admin Privileges for this module, the following buttons will appear below the albums, which allow you to execute all administrative tasks:

- [Create Album](#) – Allows you to create a new album. Name the album (limit 30 characters) and click Submit. You will be redirected to the Photo Gallery default page, which contains a table displaying all your created albums.
- [Organize Albums](#) – Allows you to organize the order in which created albums display. Click the Organize button, move the desired album up or down and click Submit.
- [Edit Selected](#) – Allows you to change the name of a particular album. Select the radio button of the album you wish to edit and click the Edit button.
- [Delete Selected](#) – Allows you to delete a particular album. Select the radio button of the album you wish to delete and click the Delete button. You will receive an alert in order to confirm the deletion, since deleting an album also deletes all the photos and images contained in that folder.

### Uploading Photos To An Album

Click on the name of the Album to which you wish to add photos. You will now be viewing the contents of the selected album and a series of new buttons to execute administrative tasks. This is an Admin Only page and will not be displayed to Members. The Album Title will be displayed in the header, along with the number of photos currently uploaded to that album. (Limit 50 per album)

- [Return To Galleries](#) – Returns you to the default “Photo Galleries” page.
- [Upload Photos](#) – Allows you to upload up to 10 photos at once. The file size limit for individual photos is 1MB per photo.
- [Organize Photos](#) – Once you have uploaded photos to an album, this button allows you to organize the display of the photos in that album. Select a photo, move it up or down, then click Submit to reorganize.
- [Delete Selected](#) – Allows you to delete selected photos from an album. Select the checkboxes of the photos you wish to delete, and then click Delete Selected to remove them permanently from the album.
- [Add Caption](#) – Allows you to add a caption to any uploaded photo. This caption will be displayed in the photo viewer below the photo.

### Viewing A Photo Album

Click on any thumbnail to open the default Album Contents page. This is the page that members will go to directly upon clicking an Album Name. The Administrator can click the “Manage Album” button at any time to return to the Album Management page, where one can upload, organize and delete photos, as well as add photo captions.

Click on any thumbnail image to launch to Photo Viewer. The Photo Viewer contains a scrolling thumbnail strip at the top, and any image can be viewed by clicking on that thumbnail. Use the left or right arrows for Previous or Next or click the Play button to execute the Slideshow feature. For user convenience, the Photo Viewer can be moved within your browser by clicking the four-arrow move tool and dragging the Photo Viewer to the desired location. To exit the Photo Viewer, roll over the large image and click, or simply click the “X” on the Photo Viewer toolbar.

## 5:16 Recipe Exchange

The Recipe Exchange module is accessible by clicking "Recipe Exchange" on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Recipe details, click on the Recipe name. To filter the list of recipes by category, select from the Filter menu located at the top of the page.

### To Add/Edit/Delete Recipes

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page:

- [Add/Edit Recipe](#) – Members who have been granted the "Add" or "Admin" Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Recipes](#) – Members who have been granted the "Admin" privilege will have the ability to add entries AND edit and delete all entries. To do this, click on the Recipe name and use the Edit and Delete buttons to execute the desired function.

## 5:17 Sitter Services

The Sitter Services module is accessible by clicking "Sitter Services" on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. To view Sitter details, click on the Sitter name. To sort by Sitter Type, click the underlined Baby, Pet and House links on the header.

### To Add/Edit/Delete Sitters

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page:

- [Add/Edit Sitter](#) – Members who have been granted the "Add" or "Admin" Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Sitters](#) – Members who have been granted the "Admin" privilege will have the ability to add entries AND edit and delete all entries. To do this, click Sitter Services on the Admin Toolbar, then click the Sitter name and use the Edit and Delete buttons to execute the desired function.

## 5:18 Website Sponsors

The Website Sponsors module is accessible by clicking Sponsors on Left Navigation. Only information entered by the administrator or members with privileges will display on this module. All Sponsor details are displayed by default. To Email a Sponsor or visit their website, click the Email Us or Visit Our Website links. The Email Us and Visit Our Website links will only appear if an Email Address and/or website address have been entered when the Sponsor was added.

### To Add/Edit/Delete/Organize Website Sponsors

If you are the Site Administrator or a member who has been issued Privileges for this module, an Admin Toolbar will appear at the top of the page:

- [Add/Edit Sponsor](#) – Members who have been granted the “Add” or “Admin” Privilege for this module can Add and Edit their own entries.
- [Edit or Delete Sponsors](#) – Members who have been granted the “Admin” privilege will have the ability to add entries AND edit and delete all entries. To do this, select the radio button for the desired sponsor, then use the Edit and Delete buttons to execute the desired function.
- [Organize Sponsors](#) – To organize the order of display for created Sponsors, click Sponsors on the Admin Toolbar, then click the Organize button, move the selected Sponsor up or down and click Submit.

## Section 6: Basic Editor Functions – Coming Soon

## Section 7: Frequently Asked Questions

### Can we use a unique domain name (ex. [www.mycommunity.org](http://www.mycommunity.org)) for our website?

Absolutely. In fact, most of our clients use their own domain name. For a fee of \$40 per year, we can purchase and setup a memorable domain name for your site that you can share with your residents. Or, you can purchase it yourself from any of a number of domain registrars. If you already have a domain name and wish to use it, contact [Support@HOATown.com](mailto:Support@HOATown.com) and we will execute the setup for you. It is critical that you do not execute a masked forwarding of your domain name as it will cause member login issues.

### How do I customize the look of my website?

Customizing the look and feel of your website is simple and can be accomplished in just a few minutes. To upload a custom header, modify the default stock header, change website colors, or organize the published links on the Left Navigation menu, click Dashboard > Customize Website Design and select the desired function.

### How do I hide modules that I do not wish to appear on the website?

We have provided you with more modules than your community likely needs in order to allow you to pick and choose the modules that will best serve your website needs. To determine which modules are published/unpublished to the website, click Dashboard > Manage Website Content > Modules and click the Publish/Hide link in the Action column of the Module table. This function can also be executed to publish/hide the Left Navigation menu links to your custom web pages.

### How do I add content to my website?

For all HOATown website modules, adding content is as simple as completing a form and clicking Submit. The information you enter will populate beautifully in a pre-formatted design. For greater flexibility, you can create up to 15 additional web pages and an unlimited number of sub-pages. For these, adding content is accomplished through the use of a dynamic content editor that gives you total control over the content and formatting of your page.

### What is the difference between the Home page and the Welcome page?

The Home page is always public and cannot be login protected. It is displayed to any and all visitors to your website. As such, it is recommended that you refrain from publishing proprietary information to this page. The Home page is best served as an introductory page to the website and typically contains a welcome message, community photo, and related introductory content.

The Welcome page, by contrast, can be login protected and serves as an excellent place to post proprietary information or important notices and/or reminders to your member residents. If published, the Welcome page will be seen immediately after a member logs into the site and also appear as a link on the Left Navigation menu for repeat access. If unpublished, members will bypass this page after login and be redirected to their Member Dashboard.

### Why can't I click on certain member names in the Directory to reveal their profile?

Members have total control over their privacy and are able to choose a preferred privacy setting to control what of their information appears in the Directory. All newly registered members are set to a privacy setting of "Standard" by default, which means only their name, address, and phone will display. However, as the Administrator, you have access to view all member information, regardless of their chosen privacy setting, by clicking Dashboard > View Member Directory > Admin Member Directory. You also have the ability to share the privilege of viewing the Admin Member Directory with up to three other members. This is accomplished by going to Dashboard > Share Website Privileges > Special Admin Privileges.

### How do I allow members to post to the Classifieds and Forum?

To allow members to post ads to the Classifieds and topics and replies to the Forum, you must assign what are known as "Rights." To do so, click on the Classifieds or Message Board, and then click "Assign Rights."

For the Classifieds, members with rights will be able to post ads to any Category. Members without rights will still be able to view the Classifieds, but not have the ability to post ads. **Note:** Only the Administrator or designated member with Admin privileges for the Classified module can create Classified Categories.

For the Forum, Rights are assigned individually by Board. Members with Rights will be able to post topics and replies to the respective Board. Members without Rights will not be able to view the Board. **Note:** Only the Administrator or designated member with Admin privileges for the Forum module can create Forum Boards.

### What are Privileges?

Privileges allow you to share the administration of the website with other members. You can assign privileges for modules, web pages and sub pages, assign Special Privileges, and allow members access to Internal Email. In order to encourage member interactivity, all newly registering members will have the "Add" privilege by default for the Garage Sales, Pet Directory, Recipe Exchange, and Sitter Services modules.

### **Can I send emails to members from the website?**

Yes. Administrators will have the ability to send both internal and external emails to members and established groups directly from the website. Admin also has the ability to assign Internal Email Privileges to any/all members, which gives them the ability to communicate with one another utilizing an internal email tool that does not rely on an external email address or email application. This feature is purely optional and only available to members if the website administrator chooses to enable it. If the feature is enabled for a member, their accounts will be automatically created and an "Access Internal Email" button will appear on their Member Dashboard.

### **How do I hide buttons that I don't want to appear on the Member Dashboard?**

The Member Dashboard is split into two sections: Standard Tools and Optional Tools. The Optional Tools buttons will only appear if the following conditions apply:

Access Internal Email– Appears if Admin assigns Internal Email Privilege to that member.

Submit/Review Requests – Appears if Admin enables ORS. (see 3:6)

Make Online Payment – Always appears unless requested to be hidden by HOATown.

Admin Member Directory – Appears if Admin assigns Special Privilege to that member. (see 3:3)

Admin Email Members– Appears if Admin assigns Special Privilege to that member. (see 3:3)

### **How do we enable Online Property Pay?**

HOATown no longer offers Online Property Pay.