

WordPress HOA Administrator User Guide

Adding New HOA Users

There are two ways to give users access to particular HOAs' Private pages.

1. Manually
2. The new user registers via the online registration form.

Manually Adding an HOA User

This is a three-step process.

1. Add a New user as described below.
 - a. Select Subscriber as the Role.

Manually Adding a New User

Click Add New from the Users page.

Add New User

Create a brand new user and add them to this site.

Username (required)

E-mail (required)

First Name

Last Name

Website

Password (required)

Repeat Password (required)

Strength indicator Hint: The password should be at least seven characters long. To make it strong use numbers, letters and symbols.

Send Password? Send this password to the new user by email.

Role

The Username, a unique email address (only one username may have the same email), and Password are required. Check the box if you want the system to automatically send the new user an email with the username and password.

2. Navigate to All Users and edit the user you just added.
 - a. Uncheck the Show Toolbar when viewing site box.

Toolbar Show Toolbar when viewing site

Name

Username Usernames cannot be changed.

Role

3. Assign the new user to an HOA in WP Sentry / User Groups as described in the next section.

Activating a new user that registers via the online registration form

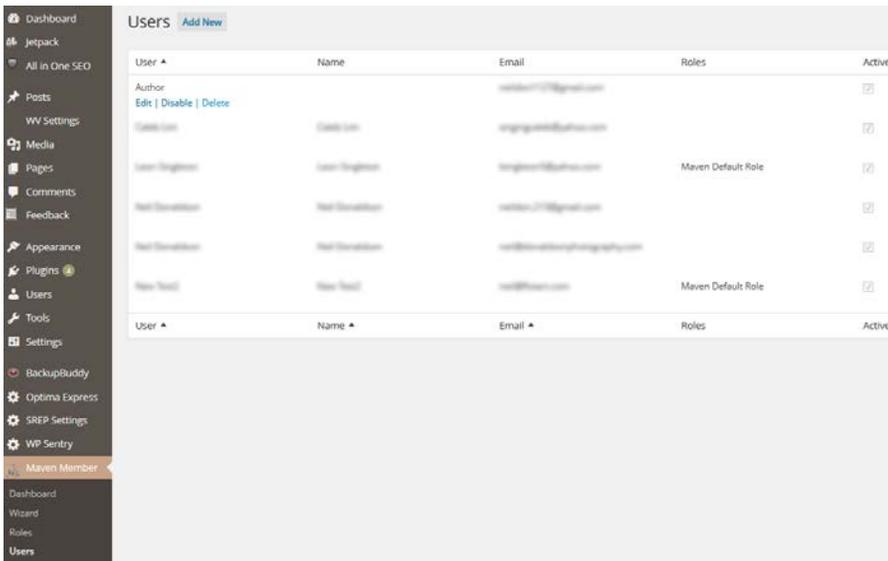
This is a three-step process.

1. The system will send an email to the website Administrator alerting them that a new user has registered online.
2. On the Maven Member / Users screen, confirm that the request is legitimate and enable the user as described in the sections that follow.
3. Assign the new user to an HOA in WP Sentry / User Groups as described in the sections that follow.

Maven Member

This is where you activate users that have submitted a registration request online.

1. On the Maven Members / Users screen (accessible from the menu on the left of the page or from the Title Bar) hover over the username and click Edit.



User	Name	Email	Roles	Active
Author		test@fakemail.com		<input checked="" type="checkbox"/>
Guest User	Guest User	guestuser@fakemail.com		<input checked="" type="checkbox"/>
User-Register	User-Register	register@fakemail.com	Maven Default Role	<input checked="" type="checkbox"/>
New TestAdmin	New TestAdmin	testadmin@fakemail.com		<input checked="" type="checkbox"/>
New Test	New Test	test@fakemail.com	Maven Default Role	<input checked="" type="checkbox"/>

2. On the next screen, verify that the registrant is a legitimate member of the HOA.
3. Check the box to Enable the user and click Update. The system will send an email to the new user informing them that their account has been activated.

Name	New Test2
Email	test@fakemail.com
Address	123 Test St
Address	
City	Test
State	CA
Zip	93443
Country	
Day	000.000.0000
Website	
Homeown	testHOA
Enable	<input checked="" type="checkbox"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

4. Next assign the new user to an HOA using WP Sentry as described in the next section.

WP Sentry

This is where you manage the access to private pages by assigning users to a particular HOA.

1. On the WP Sentry / User Groups screen (accessible from the menu on the left of the page) click the name of the HOA to which you want to assign a user.

WP Sentry User Groups

Group List

Delete Checked Groups

Name	Users	Posts	Memberships
<input type="checkbox"/> Bay Creek Condos	3 [csv]	5	0
<input type="checkbox"/> Casa del Mar	0 [csv]	0	0
<input type="checkbox"/> Lost Oak Village	0 [csv]	0	0
<input type="checkbox"/> Oak Village	0 [csv]	0	0
<input type="checkbox"/> Santa Ysabel	0 [csv]	0	0
<input type="checkbox"/> Santa Ysabel Condos	0 [csv]	0	0
<input type="checkbox"/> Sequoia-Bayview	1 [csv]	0	0
<input type="checkbox"/> Walnut Hills Ranch	0 [csv]	0	0

New Group: Add Group

2. Select the user that you want to assign to that HOA from the Members Drop-Down Box.

WP Sentry User Groups

Edit Group 'Casa del Mar'

Group Name:

Members:

This group is a member of:

3. All of the user's names and email addresses will be displayed below the Members list. The name you just selected will be added to the list. Users can be removed from the HOA by clicking Remove.

WP Sentry User Groups

Edit Group 'Casa del Mar'

Group Name:

Members:
14. New Test2 <neil@flotart.com> [remove](#)

This group is a member of:

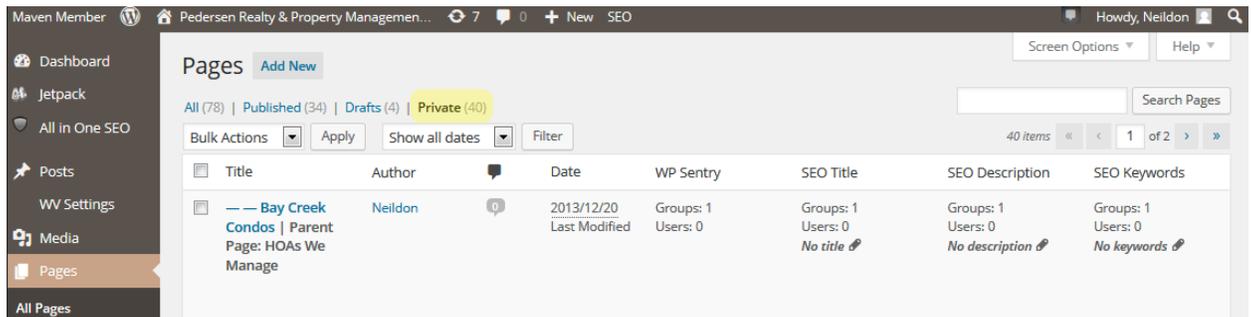
4. Click Update Group. The user can now login and access that HOA's private pages.

Managing Content on HOA Pages

This section shows how to add and edit content on the private HOA pages. For the sake of discussion, we are assuming that the pages have already been created and the permissions have already been set. That is a subject for another tutorial.

Adding or editing content is a three-step process.

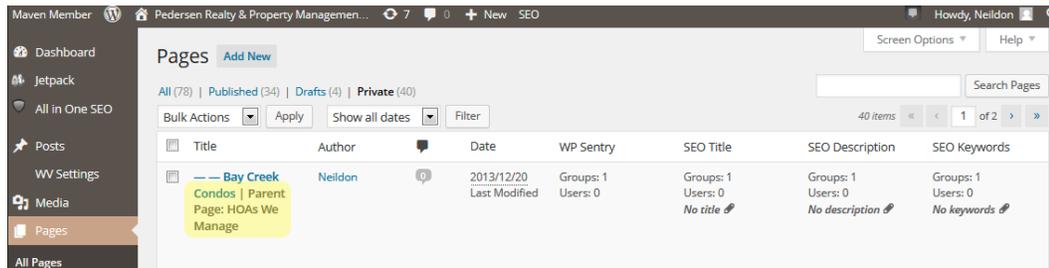
1. Login to the WordPress dashboard as an Administrator and navigate to pages.
 - a. The default view is All Pages. Click on Private so only the private pages are shown.



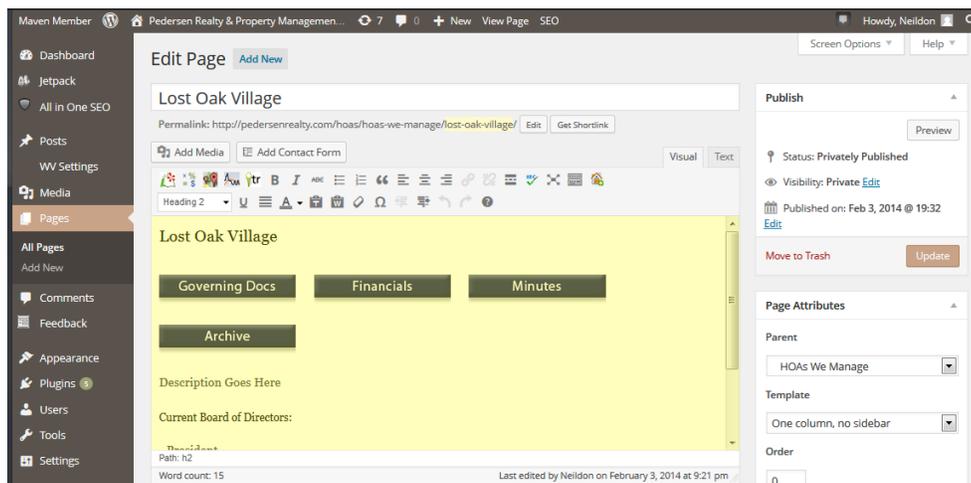
2. Hovering over a page name reveals a new menu. From this menu select Edit.
3. Add or edit content and hit Update when you are finished. After updating you can click the Preview button to see the results of your edits before closing the page.

Editing the Main HOA Page

When Private is selected on the pages screen, the page's parent page will be displayed below the page name. The main HOA pages have as a parent page, HOAs We Manage.



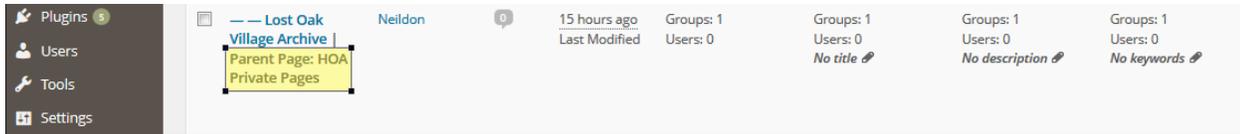
On the resulting Edit Page screen, the area highlighted in yellow below is where the page is edited.



Scroll down to where it says "Description Goes Here." Replace the text with a description of the HOA. Scroll down to the list of current Board of Directors and insert the appropriate names before each title.

Adding Content to the HOA Governing Docs, Financials, Minutes, and Archive Pages

When Private is selected on the pages screen, the page's parent page will be displayed below the page name. The HOA document pages have as a parent page, HOAs Private Pages.



Watch this short video that shows how to edit HOA pages and add PDF files to a HOA document page.

<http://youtu.be/Ob28PCHKPDs>