

Vote HOA Now Software Manual

Updated 1/2/2018

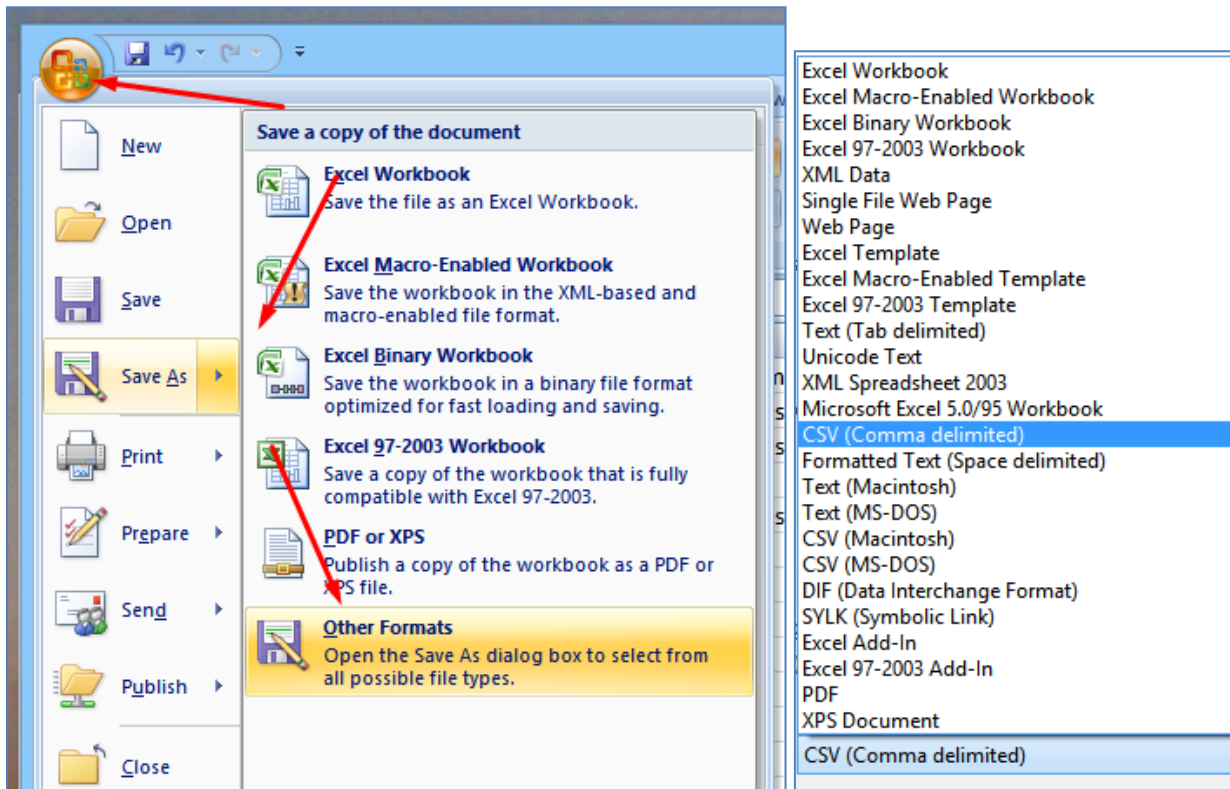
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Homeowner/Voter Setup & Management

Loading Owner Data

The first step is to prepare the file/spreadsheet that will be imported into the database. The file must be in CSV format which is common for most databases. If the database the owner information is exported from exports in Excel then simply do a save as CSV (shown below) to convert it to CSV format.



The first row of the file to be imported must be the column name(s) e.g. "Registration Code"

At a bare minimum, Registration Codes, HOA IDs, or E-Mails must be in the import file.

- Registration Code – **Must be UNIQUE if Supplied** – This code is used by voters to register aka create an account. It is also the key to the database records. **When updating owner information, the key is used to add, update, and delete records.** Registration codes that exist in the file being imported and in the database will update the other fields such as weight and email addresses. New registration codes (in the file but not in the database) will cause those records to be added to the database. Registration codes that are not in the file but are in the database will create a list of records to delete. **If this column is left empty, random numeric codes will be generated automatically, this should only be done when ADDING new records.**
- HOA ID – **Must be UNIQUE if supplied** – This can be an account number or some other identifier.
- Property ID – This can be an address or lot number; it is displayed in the voting result reports to help election inspectors identify the voter. It cannot be modified by the voter.
- Weight – Weight is used in 2 situations, the first and most common is when a person or company own more than one lot/home/condo and they get a vote for each one they own. In this case select ONE of the records/rows/lines in your spreadsheet to load, delete the others and put the number of votes they get in the weight column. It is also used in percentage voting rights situations often used in condos where owners have fractional voting weights. Even in the latter situation multi unit owners should be combined under a single

record and the total weight of all the units they own added together in the weight column. **NOTE:** If you choose not to weight multi owner records the owner will need to use a different email address for each code.

- General Information – We recommend using the owner name for this. It is displayed in the voting result reports to help election inspectors identify the voter. It cannot be modified by the voter.
- E-mail - **Must be UNIQUE if supplied** – There can only be one email address in a cell, separating them with commas or semi colons will cause the import to fail. If email addresses are provided the email tool can be used to send invitations to vote that can include the registration code and a link to the voting site. The voter can change their email when they create their account.
- First Name & Last Name – If supplied this can be used when sending emails to personalize messages e.g. Dear John Doe as opposed to Dear Community Member. Note: If your first and last names are combined put them in either the first or last name columns, (not both).

The following image is of an owner file where every field/column is being used

| | A | B | C | D | E | F | G | H |
|----|-------------------|------------|-----------------------|------------|------------|-----------------------|---------------------|-------------|
| 1 | Registration Code | HOA ID | Property ID | First Name | Last Name | Email Address | General Information | Vote Weight |
| 2 | 4034784621 | 4034784621 | 12782 SW Sunnyside Rd | Bob | Bayer | test5@votehoanow.com | Bryan Bayer | 2 |
| 3 | 2723949235 | 2723949235 | 12887 SW Sunnyside Rd | Sammy | St Charles | test10@votehoanow.com | Samantha St Charles | 1 |
| 4 | 2864833086 | 2864833086 | 26945 N Bisquit | Cadeo | Chiem | test11@votehoanow.com | Cadeo Chiem | 1 |
| 5 | 3703220110 | 3703220110 | Lot # 205 | Sue | Jones | test1@votehoanow.com | Bob & Susan Jones | 3 |
| 6 | 3176006217 | 3176006217 | 29788 Kings Court Ln | Naomi | Salazar | test3@votehoanow.com | Naomi Salazar | 1 |
| 7 | 6330302017 | 6330302017 | 28955 N Bisquit | Nick | Torres | | Nick Torres | 1 |
| 8 | 1358417240 | 1358417240 | 12722 SW Sunnyside Rd | Linda J | Peterson | | Linda J Peterson | 1 |
| 9 | 8901705931 | 8901705931 | 11209 SW Sunnyside Rd | Glen | O'Connell | | Glen O'Connell | 1 |
| 10 | 2000199869 | 2000199869 | 11014 SW Sunnyside Rd | David | Johnson | | David P Johnson | 4 |
| 11 | 3398222932 | 3398222932 | 29784 Kings Court Ln | Jose | Reyes | test4@votehoanow.com | Jose Reyes | 2 |

The next 3 images are also valid files that could be loaded

Just Registration Codes

| | A | B | C | D | E |
|----|-------------------|---|---|---|---|
| 1 | Registration Code | | | | |
| 2 | 4034784621 | | | | |
| 3 | 2723949235 | | | | |
| 4 | 2864833086 | | | | |
| 5 | 3703220110 | | | | |
| 6 | 3176006217 | | | | |
| 7 | 6330302017 | | | | |
| 8 | 1358417240 | | | | |
| 9 | 8901705931 | | | | |
| 10 | 2000199869 | | | | |
| 11 | 3398222932 | | | | |
| 12 | | | | | |

Just HOA ID (This would cause the system to generate random numeric registration codes).

| | A | B | C |
|----|------------|---|---|
| 1 | HOA ID | | |
| 2 | 4034784621 | | |
| 3 | 2723949235 | | |
| 4 | 2864833086 | | |
| 5 | 3703220110 | | |
| 6 | 3176006217 | | |
| 7 | 6330302017 | | |
| 8 | 1358417240 | | |
| 9 | 8901705931 | | |
| 10 | 2000199869 | | |
| 11 | 3398222932 | | |
| 12 | | | |

Just the E-Mail address (This would cause the system to generate random numeric registration codes).

| | A | |
|---|-----------------------|--|
| 1 | Email Address | |
| 2 | test5@votehoanow.com | |
| 3 | test10@votehoanow.com | |
| 4 | test11@votehoanow.com | |
| 5 | test1@votehoanow.com | |
| 6 | test3@votehoanow.com | |
| 7 | | |

Assuming the records from the first image of an owner file had been loaded previously (where all columns were used); loading the file shown in the following example would cause **3 records to be added to the database**, the rest would be updated although nothing has been changed in the example image.

| | A | B | C | D | E | F | G | H |
|----|-------------------|------------|-----------------------|------------|------------|-----------------------|---------------------|-------------|
| 1 | Registration Code | HOA ID | Property ID | First Name | Last Name | Email Address | General Information | Vote Weight |
| 2 | 4034784621 | 4034784621 | 12782 SW Sunnyside Rd | Bob | Bayer | test5@votehoanow.com | Bryan Bayer | 2 |
| 3 | 2723949235 | 2723949235 | 12887 SW Sunnyside Rd | Sammy | St Charles | test10@votehoanow.com | Samantha St Charles | 1 |
| 4 | 2864833086 | 2864833086 | 26945 N Bisquit | Cadeo | Chiem | test11@votehoanow.com | Cadeo Chiem | 1 |
| 5 | 3703220110 | 3703220110 | Lot # 205 | Sue | Jones | test1@votehoanow.com | Bob & Susan Jones | 3 |
| 6 | 3176006217 | 3176006217 | 29788 Kings Court Ln | Naomi | Salazar | test3@votehoanow.com | Naomi Salazar | 1 |
| 7 | 6330302017 | 6330302017 | 28955 N Bisquit | Nick | Torres | | Nick Torres | 1 |
| 8 | 1358417240 | 1358417240 | 12722 SW Sunnyside Rd | Linda J | Peterson | | Linda J Peterson | 1 |
| 9 | 8901705931 | 8901705931 | 11209 SW Sunnyside Rd | Glen | O'Connell | | Glen O'Connell | 1 |
| 10 | 2000199869 | 2000199869 | 11014 SW Sunnyside Rd | David | Johnson | | David P Johnson | 4 |
| 11 | 3398222932 | 3398222932 | 29784 Kings Court Ln | Jose | Reyes | test4@votehoanow.com | Jose Reyes | 2 |
| 12 | 12345 | | | | | | | |
| 13 | 67890 | | | | | | | |
| 14 | 22334455 | | | | | | | |
| 15 | | | | | | | | |

←←← New Registration Codes

The same is true for this file

| | A | B | C | D | E | F | G | H |
|----|-------------------|------------|-----------------------|------------|------------|-----------------------|---------------------|-------------|
| 1 | Registration Code | HOA ID | Property ID | First Name | Last Name | Email Address | General Information | Vote Weight |
| 2 | 4034784621 | 4034784621 | 12782 SW Sunnyside Rd | Bob | Bayer | test5@votehoanow.com | Bryan Bayer | 2 |
| 3 | 2723949235 | 2723949235 | 12887 SW Sunnyside Rd | Sammy | St Charles | test10@votehoanow.com | Samantha St Charles | 1 |
| 4 | 2864833086 | 2864833086 | 26945 N Bisquit | Cadeo | Chiem | test11@votehoanow.com | Cadeo Chiem | 1 |
| 5 | 3703220110 | 3703220110 | Lot # 205 | Sue | Jones | test1@votehoanow.com | Bob & Susan Jones | 3 |
| 6 | 3176006217 | 3176006217 | 29788 Kings Court Ln | Naomi | Salazar | test3@votehoanow.com | Naomi Salazar | 1 |
| 7 | 6330302017 | 6330302017 | 28955 N Bisquit | Nick | Torres | | Nick Torres | 1 |
| 8 | 1358417240 | 1358417240 | 12722 SW Sunnyside Rd | Linda J | Peterson | | Linda J Peterson | 1 |
| 9 | 8901705931 | 8901705931 | 11209 SW Sunnyside Rd | Glen | O'Connell | | Glen O'Connell | 1 |
| 10 | 2000199869 | 2000199869 | 11014 SW Sunnyside Rd | David | Johnson | | David P Johnson | 4 |
| 11 | 3398222932 | 3398222932 | 29784 Kings Court Ln | Jose | Reyes | test4@votehoanow.com | Jose Reyes | 2 |
| 12 | | | | | | test22@votehoanow.com | | |
| 13 | | | New Email Addresses | | | test33@votehoanow.com | | |
| 14 | | | | | | test44@votehoanow.com | | |
| 15 | | | | | | | | |

And this file

| | A | B | C | D | E | F | G | H |
|----|-------------------|------------|-----------------------|------------|-------------|-----------------------|---------------------|-------------|
| 1 | Registration Code | HOA ID | Property ID | First Name | Last Name | Email Address | General Information | Vote Weight |
| 2 | 4034784621 | 4034784621 | 12782 SW Sunnyside Rd | Bob | Bayer | test5@votehoanow.com | Bryan Bayer | 2 |
| 3 | 2723949235 | 2723949235 | 12887 SW Sunnyside Rd | Sammy | St Charles | test10@votehoanow.com | Samantha St Charles | 1 |
| 4 | 2864833086 | 2864833086 | 26945 N Bisquit | Cadeo | Chiem | test11@votehoanow.com | Cadeo Chiem | 1 |
| 5 | 3703220110 | 3703220110 | Lot # 205 | Sue | Jones | test1@votehoanow.com | Bob & Susan Jones | 3 |
| 6 | 3176006217 | 3176006217 | 29788 Kings Court Ln | Naomi | Salazar | test3@votehoanow.com | Naomi Salazar | 1 |
| 7 | 6330302017 | 6330302017 | 28955 N Bisquit | Nick | Torres | | Nick Torres | 1 |
| 8 | 1358417240 | 1358417240 | 12722 SW Sunnyside Rd | Linda J | Peterson | | Linda J Peterson | 1 |
| 9 | 8901705931 | 8901705931 | 11209 SW Sunnyside Rd | Glen | O'Connell | | Glen O'Connell | 1 |
| 10 | 2000199869 | 2000199869 | 11014 SW Sunnyside Rd | David | Johnson | | David P Johnson | 4 |
| 11 | 3398222932 | 3398222932 | 29784 Kings Court Ln | Jose | Reyes | test4@votehoanow.com | Jose Reyes | 2 |
| 12 | | 454545 | | | | | | |
| 13 | | 67676767 | | | New HOA IDs | | | |
| 14 | | 8989898 | | | | | | |
| 15 | | | | | | | | |

Updating Records

To update ANY of the records in the database you need the Registration Code (the key) and at the very least the column you want to update. The two most common things that need to be updated are email addresses and weight (when multi-property owners buy or sell property). If you wanted to update the email address and weight for Bob Bayer in the first record, you would make those changes and upload the entire file.

This

| 1 | Registration Code | HOA ID | Property ID | First Name | Last Name | Email Address | General Information | Vote Weight |
|---|-------------------|------------|-----------------------|------------|------------|-----------------------|---------------------|-------------|
| 2 | 4034784621 | 4034784621 | 12782 SW Sunnyside Rd | Bob | Bayer | test5@votehoanow.com | Bryan Bayer | 2 |
| 3 | 2723949235 | 2723949235 | 12887 SW Sunnyside Rd | Sammy | St Charles | test10@votehoanow.com | Samantha St Charles | 1 |

To This

| 1 | Registration Code | HOA ID | Property ID | First Name | Last Name | Email Address | General Information | Vote Weight |
|---|-------------------|------------|-----------------------|------------|------------|------------------------|---------------------|-------------|
| 2 | 4034784621 | 4034784621 | 12782 SW Sunnyside Rd | Bob | Bayer | test55555@votehoanow.c | Bryan Bayer | 1 |
| 3 | 2723949235 | 2723949235 | 12887 SW Sunnyside Rd | Sammy | St Charles | test10@votehoanow.com | Samantha St Charles | 1 |

Alternatively, this file would likewise update that information:

| | A | B | C | D | E |
|---|-------------------|--------------------------|-------------|---|---|
| 1 | Registration Code | Email Address | Vote Weight | | |
| 2 | 4034784621 | test55555@votehoanow.com | 1 | | |
| 3 | | | | | |
| 4 | | | | | |

Deleting Records

To delete records from the database, simply delete those lines from the file and re-import it.

The original file shown below has 10 records in it, 11 lines in total including the header.

| | A | B | C | D | E | F | G | H |
|----|-------------------|------------|-----------------------|------------|------------|--|---------------------|-------------|
| 1 | Registration Code | HOA ID | Property ID | First Name | Last Name | Email Address | General Information | Vote Weight |
| 2 | 4034784621 | 4034784621 | 12782 SW Sunnyside Rd | Bob | Bayer | test5@votehoanow.com | Bryan Bayer | 2 |
| 3 | 2723949235 | 2723949235 | 12887 SW Sunnyside Rd | Sammy | St Charles | test10@votehoanow.com | Samantha St Charles | 1 |
| 4 | 2864833086 | 2864833086 | 26945 N Bisquit | Cadeo | Chiem | test11@votehoanow.com | Cadeo Chiem | 1 |
| 5 | 3703220110 | 3703220110 | Lot # 205 | Sue | Jones | test1@votehoanow.com | Bob & Susan Jones | 3 |
| 6 | 3176006217 | 3176006217 | 29788 Kings Court Ln | Naomi | Salazar | test3@votehoanow.com | Naomi Salazar | 1 |
| 7 | 6330302017 | 6330302017 | 28955 N Bisquit | Nick | Torres | | Nick Torres | 1 |
| 8 | 1358417240 | 1358417240 | 12722 SW Sunnyside Rd | Linda J | Peterson | | Linda J Peterson | 1 |
| 9 | 8901705931 | 8901705931 | 11209 SW Sunnyside Rd | Glen | O'Connell | | Glen O'Connell | 1 |
| 10 | 2000199869 | 2000199869 | 11014 SW Sunnyside Rd | David | Johnson | scott@strateja.com | David P Johnson | 4 |
| 11 | 3398222932 | 3398222932 | 29784 Kings Court Ln | Jose | Reyes | test4@votehoanow.com | Jose Reyes | 2 |

In this example we are deleting the last 5 records, lines 7-11

| | A | B | C | D | E | F | G | H |
|----|-------------------|------------|-----------------------|------------|------------|--|---------------------|-------------|
| 1 | Registration Code | HOA ID | Property ID | First Name | Last Name | Email Address | General Information | Vote Weight |
| 2 | 4034784621 | 4034784621 | 12782 SW Sunnyside Rd | Bob | Bayer | test5@votehoanow.com | Bryan Bayer | 2 |
| 3 | 2723949235 | 2723949235 | 12887 SW Sunnyside Rd | Sammy | St Charles | test10@votehoanow.com | Samantha St Charles | 1 |
| 4 | 2864833086 | 2864833086 | 26945 N Bisquit | Cadeo | Chiem | test11@votehoanow.com | Cadeo Chiem | 1 |
| 5 | 3703220110 | 3703220110 | Lot # 205 | Sue | Jones | test1@votehoanow.com | Bob & Susan Jones | 3 |
| 6 | 3176006217 | 3176006217 | 29788 Kings Court Ln | Naomi | Salazar | test3@votehoanow.com | Naomi Salazar | 1 |
| 7 | | | | | | | | |
| 8 | | | | | | | | |
| 9 | | | | | | | | |
| 10 | | | | | | | | |

When the file is imported the report shows the lines imported, the lines updated and the last line shows there are 5 that should be reviewed and possibly deleted. To complete the deletion click **Review Registration Codes To Delete.**

| | |
|--|---|
| Total lines imported from file: | 5 |
| New registration codes added | 0 |
| Registration codes updated | 5 |
| Registration codes in the system but not in the import | 5 |
| Review Registration Codes To Delete. | |

Review the list and click **Delete these** at the bottom of the list.

These homeowners are in the system and were not in the list of homeowners you imported.

These homeowners will be deleted when you click "Delete these" at the bottom of the list.

Cancel

| HOA Account ID | Property ID | Vote Weight | Registration Code | Additional Information | Email |
|----------------|-----------------------|-------------|-------------------|------------------------|----------------------|
| 8901705931 | 11209 SW Sunnyside Rd | 1 | 8901705931 | Glen O'Connell | |
| 2000199869 | 11014 SW Sunnyside Rd | 4 | 2000199869 | David P Johnson | scott@strateja.com |
| 3398222932 | 29784 Kings Court Ln | 2 | 3398222932 | Jose Reyes | test4@votehoanow.com |
| 6330302017 | 28955 N Bisquit | 1 | 6330302017 | Nick Torres | |
| 1358417240 | 12722 SW Sunnyside Rd | 1 | 1358417240 | Linda J Peterson | |

If you do not want to delete all these (you only want to delete some of these), adjust the spreadsheet and start over.

Delete these

If the list of files to delete is incorrect, make corrections to the CSV file and import it again.

USE THE METHOD ABOVE TO RELOAD THE ENTIRE DATABASE.

If you make a mistake and want to start over, create a spreadsheet (CSV) with one column (Registration Code) and make up one code.

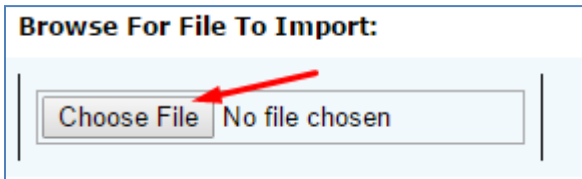
Load the file and follow the steps to delete the other records.

You can then load the real thing and delete that single code per above OR delete it manually from the main homeowners page.

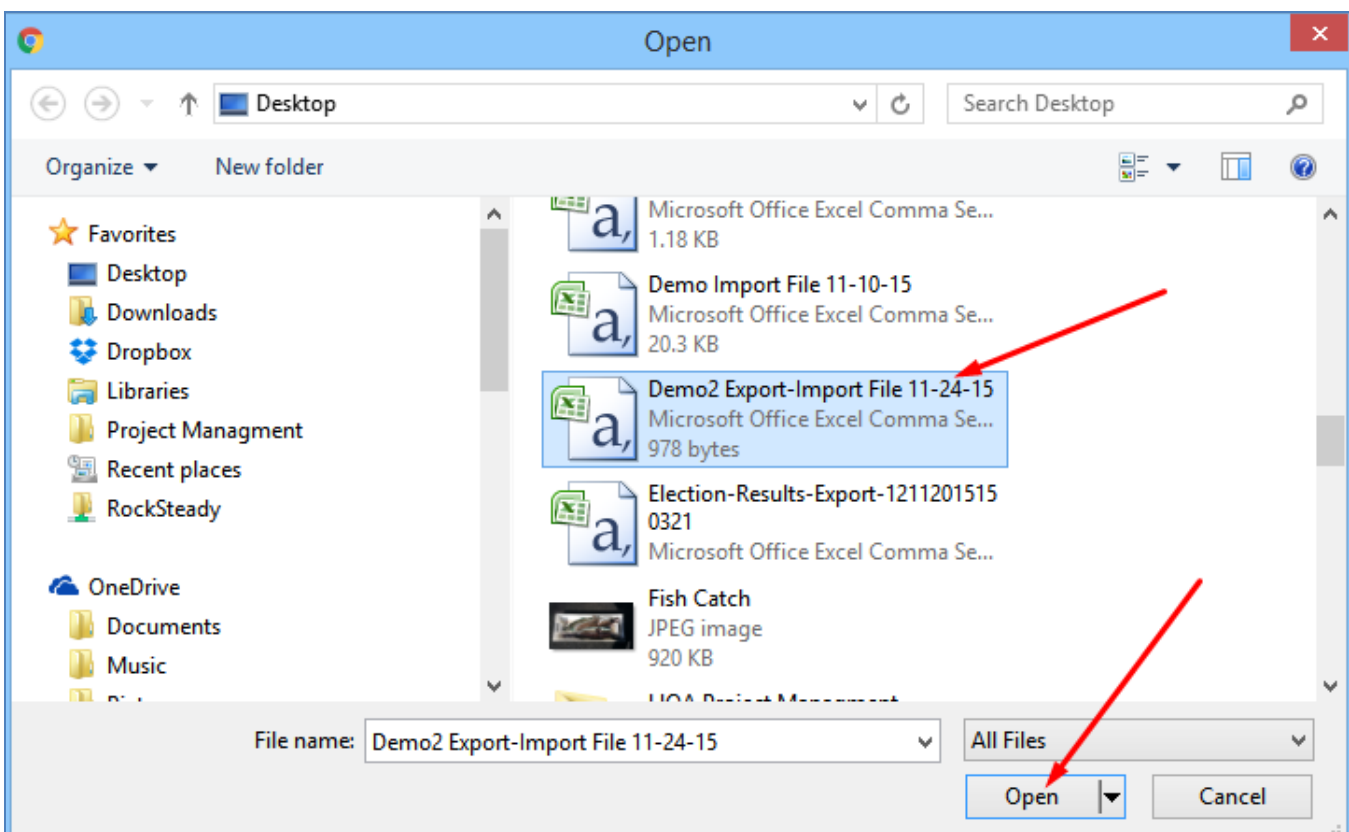
Importing the Owner Data File

Whether you are loading data for the first time or adding, updating or deleting records it's all a matter of getting the file ready and then importing it.

From the main menu click **Homeowners** then **Import Homeowners** the screen shows some documentation, click choose file



Browse to the folder your file is located in and click the file then **click open**



Then click **Import File**

Browse For File To Import:

Choose File Demo2 Expo...24-15.csv

Import File

If all of your column names are used and your column names match our naming convention you will see this

Import Homeowner Information

First, What Is The Name Of The Column(S) You Are Importing?

| | Column Heading | | |
|----------------------------|-----------------------|------------------------|---|
| Registration Code | Registration Code ▼ | *UNIQUE* *REQUIRED* | *Not required for new accounts, the system will generate one automatically. This is the system key for updates and is required for updates. It can be changed manually in the Homeowner Setup section, but not by import. |
| HOA ID | HOA ID ▼ | *UNIQUE* | The HOA ID helps election management identify voters by their Association ID. This is an optional field. |
| Property ID | Property ID ▼ | | |
| Weight | Vote Weight ▼ | | The default is a weight of 1. |
| General Information | General Information ▼ | | This is included in voting reports to assist in identifying who has voted. |
| Email | Email Address ▼ | *UNIQUE* | |
| First Name | First Name ▼ | *OPTIONAL* | |
| Last Name | Last Name ▼ | *OPTIONAL* | |

Update Empty Fields Too

Continue to Import File

The **Column Heading** comes from the first row of the file you are importing, if you have left some columns out or named them something other than our naming convention you will see **Do not import ▼**

In the following example the columns for **Property ID** and **General Information** were left out of the file.

First, What Is The Name Of The Column(S) You Are Imp

| | Column Heading | | |
|----------------------------|---------------------|------------------------|--|
| Registration Code | Registration Code ▼ | *UNIQUE* *REQUIRED* | *Not r system This is is requ chang Setup |
| HOA ID | HOA ID ▼ | *UNIQUE* | The H mana Associ |
| Property ID | Do not import ▼ | | |
| Weight | Vote Weight ▼ | | The de |
| General Information | Do not import ▼ | | This is assist |
| Email | Email Address ▼ | *UNIQUE* | |
| First Name | First Name ▼ | *OPTIONAL* | |
| Last Name | Last Name ▼ | *OPTIONAL* | |

Update Empty Fields Too

As an example let's say the CSV file has columns named "Lot #" and "Address" that you want to use for "Property ID" and "General Information" as in this image:

| A | B | C | D | E | F | G | H |
|-------------------|--------|-------|------------|-----------|---------------|---------|-------------|
| Registration Code | HOA ID | Lot # | First Name | Last Name | Email Address | Address | Vote Weight |

Clicking "Do not Import" will display a list of column names so that you can select which to use. It will work the same way for any of the column names in the CSV that are different than the names used in the database.

| | | | |
|--------------------|---|----------------------------|---|
| Property ID | Do not import ▼ Do not import Lot# Address | General Information | Do not import ▼ Do not import Lot# Address |
| Weight | | Email | |

AND

Once you have all your columns lined up /mapped click "[Continue to Import File](#)".

Setting up a new Ballot/Election

In the administration menu, click **Election/Ballot Management** then **New Ballot**

Fill in the form, choose the options you want on the ballot and click **Add This Election/Ballot**, you can always change something if you decide you don't want it later. NOTE, we don't recommend changing any options once voting has started.

In the following example, we are creating a BOD ballot with 4 openings, no voting instructions, no voting pamphlet, no proxy or quorum only options set and no write-ins. NOTE: The Voting Pamphlet is a document that will appear on the ballot and can be used for any information you need to convey to voters.

| | |
|---|---|
| Election/Ballot Name: | 2016 Directors Election |
| Voting Instructions: | <div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; font-size: small;"> EditInsertViewFormatTableTools </div> <div style="display: flex; justify-content: space-between; font-size: x-small;"> Formats B <i>I</i> <u>U</u> S ☰ ☰ ☰ ☰ ☰ ☰ ☰ </div> <div style="display: flex; justify-content: space-between; font-size: x-small;"> 🔗 🖼️ </div> <div style="display: flex; justify-content: space-between; font-size: x-small;"> 👁️ 🔍 A A 😊 </div> <div style="border: 1px solid #ccc; height: 100px; margin-top: 5px;"></div> <div style="display: flex; justify-content: flex-end; font-size: x-small;"> Words: 0 </div> </div> |
| Voting Pamphlet: (Must be in PDF format) | Click Here to Upload or Choose |
| Show Proxy Option | <input type="checkbox"/> Yes |
| Show Proxy Write-In Option | <input type="checkbox"/> Yes |
| Show Directed Proxy Option | <input type="checkbox"/> Yes |
| Show Directed Proxy Write-In Option | <input type="checkbox"/> Yes |
| Show "Quorum Only" Vote Option | <input type="checkbox"/> Yes |
| Number Of Candidate Openings: | <input type="text" value="4"/> |
| Allow Write-Ins: | <input type="checkbox"/> Yes |
| Number Of Issues/Measures: | <input type="text" value="0"/> |
| Start Date: | <input type="text" value="2016-11-08"/> (YYYY-MM-DD) 📅 |
| Start Time: | <input type="text" value="12:00 am"/> (Pacific Time) |
| End Date: | <input type="text" value="2016-12-06"/> (YYYY-MM-DD) 📅 |
| End Time: | <input type="text" value="12:00 am"/> (Pacific Time) |
| <div style="border: 1px solid #0070c0; padding: 5px; display: inline-block; background-color: #e6f2ff;"> Add This Election/Ballot </div> | |


Add Candidates

Once you add your election you will be prompted to add candidates, click the **Add Candidate** button to begin.

NOTE: Candidates can be added at a later time as well.


NOTE: Scanned BIOS from handwritten candidate statements must all be combined into the "Voting Pamphlet" and added in the election setup screen. Then in the Candidate BIO area use "Please See Voting Pamphlet for Candidate BIOS"

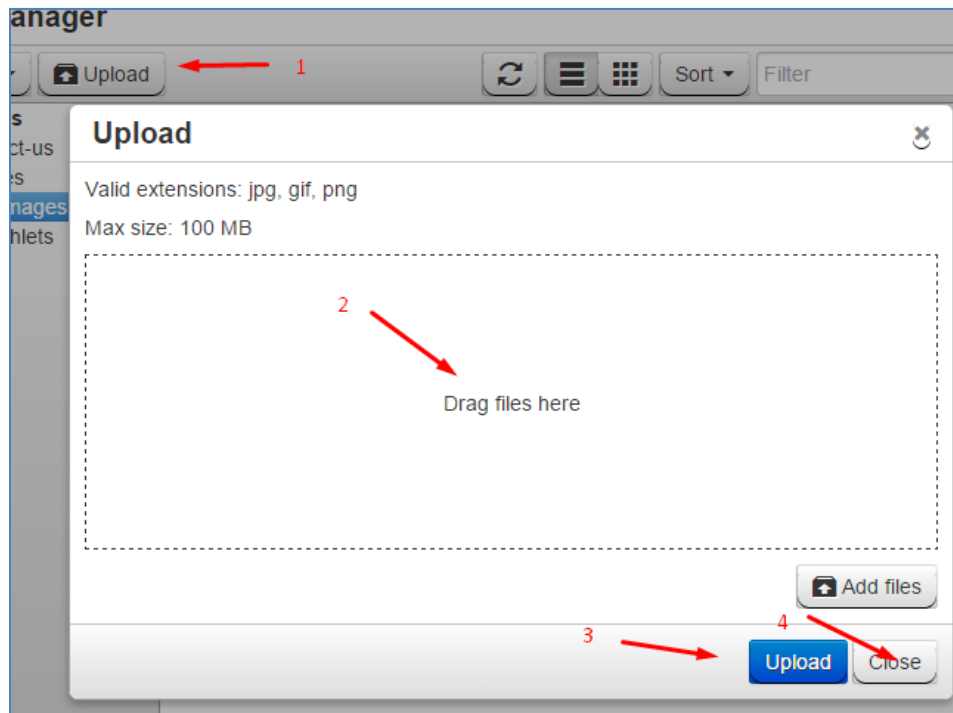
Fill in the Candidate name, BIO and or any other information for that candidate as well as a photo if you have one. The text and images for following example was taken from Wikipedia

| | | |
|----------|------------------|---|
| required | Candidate Name: | <input type="text" value="Teresa Martin"/> |
| required | Candidate Bio: | <div data-bbox="121 724 1299 1396"><p>File Edit Insert View Format Table Tools</p><p>Formats B I U S [List Icons]</p><p>A [Color Picker] [Font Size] [Smiley]</p><p>My husband and I purchased our home two years ago we enjoye raising our children here. I am running for the board and would like to work on the landscaping beautification project over this next year.</p><p>I have attended most board meetings since becoming an owner. I have participated on the landscape design committee and assisted in selecting a new landscaping company. I understand the bidding process and I am committed to selecting vendors that will provide the service each of us expect as owners.</p><p>We have several other landscaping projects on the horizon the renovation of the front and back entrance to more environmentally sustainable plantings, replacing the pond motors without damaging the water life and plantings in each of these areas along with the playground renovation incorporating some safer areas for our kids and grandkids to play without any hazards .</p><p>I have truly enjoyed working with the current board and the landscaping committee and feel that I have a lot more to contribute to the success of these projects.</p><p>I hope you will remember my name when you see it on the ballot and allow me the opportunity to serve the community as a board member.</p><p>Thank you for your vote in this next election.</p><p>Teresa Martin 7 Demo Lane Our Town, HOA 12345</p><p>p Words: 214</p></div> |
| | Candidate Image: | <div data-bbox="397 1417 673 1953"><p>Click To Clear The Image</p><p>Click To Select An Image</p><p>Add This Candidate</p></div> |

Adding Candidate Image

Clicking on “Click To Select An Image” will display the image manager, you can select previously uploaded images or click

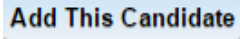
 to add new images, then drag your image file into the box and click the 2nd upload button at the bottom right corner of the page, and then Close once the image is done uploading.



The file you just uploaded will then appear in the list of files and automatically be selected. Click insert, then close to finish.

| Filename | Size | Type | Modification date |
|---|-------|------|---------------------|
| <input type="checkbox"/> banner.jpg | 16 KB | jpg | 11/10/2015 15:19:23 |
| <input type="checkbox"/> Ian Jones.jpg | 21 KB | jpg | 12/01/2015 16:44:53 |
| <input type="checkbox"/> Jim Stevens.jpg | 27 KB | jpg | 12/01/2015 16:44:53 |
| <input type="checkbox"/> mailBanner.jpg | 11 KB | jpg | 11/10/2015 15:19:48 |
| <input type="checkbox"/> Mary Moore.jpg | 34 KB | jpg | 12/01/2015 16:44:53 |
| <input type="checkbox"/> no.jpg | 3 KB | jpg | 11/10/2015 15:37:32 |
| <input checked="" type="checkbox"/> Teresa Martin.jpg | 29 KB | jpg | 12/01/2015 16:44:52 |
| <input type="checkbox"/> William Garcia.jpg | 29 KB | jpg | 12/01/2015 16:44:52 |
| <input type="checkbox"/> yes.jpg | 4 KB | jpg | 11/10/2015 15:37:32 |

At the bottom right of the table area, there are two buttons: "Insert" (marked with a red arrow) and "Close" (marked with a red arrow).

Lastly click . Repeat these steps to add the other candidates.

Review the Ballot

When you're done adding your candidates return to the main election screen **Election/Ballot Management** and click "View" to see the ballot.


2016 Directors Election

| | | |
|---------------------------------|------------------------|---------------------|
| Manage Candidates/Issues | Begins | 11/08/2016 12:00 am |
| View | Ends | 12/06/2016 12:00 am |
| Modify | Candidates | 4 |
| Delete and Archive | Issues/Measures | 0 |

Election scheduled

The following is only a partial view of the ballot that was created for this manual; the entire ballot is displayed in the admin screen.

Teresa Martin



My husband and I purchased our home two years ago we enjoye raising o running for the board and would like to work on the landscaping beautifica year.

I have attended most board meetings since becoming an owner. I have p design committee and assisted in selecting a new landscaping company. I and I am committed to selecting vendors that will provide the service each

We have several other landscaping projects on the horizon the renovation to more environmentally sustainable plantings, replacing the pond motors life and plantings in each of these areas along with the playground renova areas for our kids and grandkids to play without any hazards .

I have truly enjoyed working with the current board and the landscaping committee and feel that I h the success of these projects.

I hope you will remember my name when you see it on the ballot and allow me the opportunity to se member.

Thank you for your vote in this next election.

Teresa Martin
7 Demo Lane
Our Town, HOA 12345

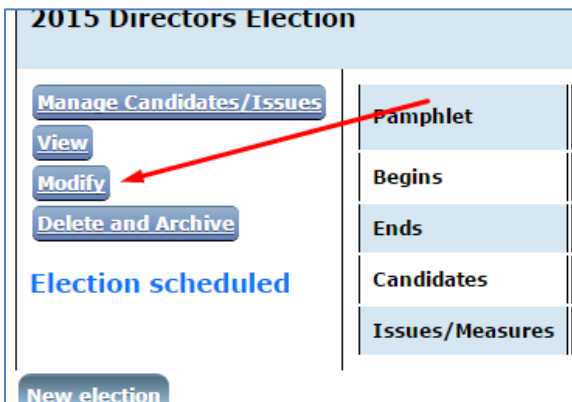
Proxy, Directed Proxy and Quorum only Options

These options are available when adding or modifying an election/ballot, for this manual we're going to modify the ballot we created above to show how they work, but first a brief explanation of each.

- Proxy Option – This option will add a predetermined choice of proxy to the ballot. An example would be the Secretary of the board.

- Proxy Write-In Option – This provides a space to write in the name of a person they are giving their proxy to.
- Directed Proxy Option – With this option a voter is assigning their proxy to a predetermined proxy holder and directing them how to vote for them at the meeting. If voter chooses this option, they will be directed to the ballot next. This is also known as an instructed proxy.
- Directed Proxy Write-In Option – This is the same as the Directed Proxy Option except it allows a voter to write in the name of their proxy.
- Show "Quorum Only" Vote Option – This will appear on the ballot and if a voter chooses this it will be the only thing they can select on the ballot. The idea is that a voter may not know which candidate they want to vote for but do want to be counted for making meeting quorum. You may want to check with your HOAs attorney before using this option.

Click on **Election/Ballot Management** and then Modify



You will see the same screen as when we created the election, we are focusing on the 5 options below:

| | |
|---|---------------------------------|
| Election Name: | 2015 Directors Election |
| Voting Pamphlet: (Must be in PDF format) | <i>Click filename to change</i> |
| Proxy Option | <input type="checkbox"/> Yes |
| Proxy Write-In Option | <input type="checkbox"/> Yes |
| Directed Proxy Option | <input type="checkbox"/> Yes |
| Directed Proxy Write-In Option | <input type="checkbox"/> Yes |
| Show "Quorum Only" Vote Option | <input type="checkbox"/> Yes |
| Number Of Candidate Openings | |

Selecting any of these options expands the option allowing you to enter the text that will appear on the ballot for that option.


| | |
|--------------------------------|---|
| Proxy Option | <input checked="" type="checkbox"/> Yes |
| Text for "Proxy Option" | <input type="text" value="I choose the secretary of the board to be my proxy in this election. Doing so only allows them to be my proxy in this election and my proxy expires after November 19th, 2015."/> |
| Proxy Write-In Option | <input type="checkbox"/> Yes |
| Directed Proxy Option | <input type="checkbox"/> Yes |
| Directed Proxy Write-In Option | <input type="checkbox"/> Yes |
| Show "Quorum Only" Vote Option | <input checked="" type="checkbox"/> Yes |
| Text For "Quorum Only" Vote | <input type="text" value="Voting To Make Quorum Only"/> |

Once you choose the options you want, click [Save Changes To This Election/Ballot](#) (add if you're doing this all at once) and then go back and view the ballot.


Making the changes shown above our ballot now looks like this:

Election: 2015 Directors Election

Your voting weight is : 1

Select An Option: 

- Vote for up to 4 candidates**
- I Do Not Wish To Vote And Do Not Want To Receive Future Email Notifications About This Election.**
- Voting To Make Quorum Only**
- I choose the secretary of the board to be my proxy in this election. Doing so only allows them to be my proxy in this election and my proxy expires after November 19th, 2015.**

Voting Pamphlet: 

Note that the ballot no longer appears automatically and that an option must be selected.

Issue Ballots

Issues are anything that require a yes or no vote. Amendments are the usual issue ballots but it can be used for annual budget and meeting minute approvals or anything else of this nature. You can have a mixed ballot where there is a board election and issues on the same ballot. If you do have a mixed ballot there are 2 important considerations.

1. If there is any chance an issue ballot will run longer or need to be extended it should go on a separate ballot from the board ballot. Extending the voting time on a mixed ballot means that the entire ballot is extended.
2. All issues must be voted on before a ballot can be cast, to phrase this another way voters are not allowed to skip ANY issues or to vote on the board election and not the issues.

To create an issue ballot, follow the steps for setting up a new ballot click **Election/Ballot Management** and add a new ballot or modify an existing one. Look for "Number Of Issues/Measures:" and enter the number of issues that will be on the ballot.

| | |
|-------------------------------|--|
| Number Of Candidate Openings: | <input type="text" value="4"/> |
| Allow Write-Ins: | <input type="checkbox"/> Yes |
| Number Of Issues/Measures: | <input type="text" value="2"/> |
| Start Date: | <input type="text" value="2016-11-08"/> (YYYY-MM-DD) |

Once you've set up the ballot you can add the issues, click **Manage Candidates/Issues** from the main election/ballot management screen and then click **Add Issue**.

Enter the name of the issue in the Issue: box, Enter the text for the Yes and No Choices, could be I Accept, I Reject, etc.... Enter the description in the large text area, if you want to include an Abstain vote on the ballot check the box for that. The Abstain selection on the ballot provides a way for voters to skip an Issue. The ballot will have yes, no, and I abstain choices rather than just yes and no if this is checked/selected.

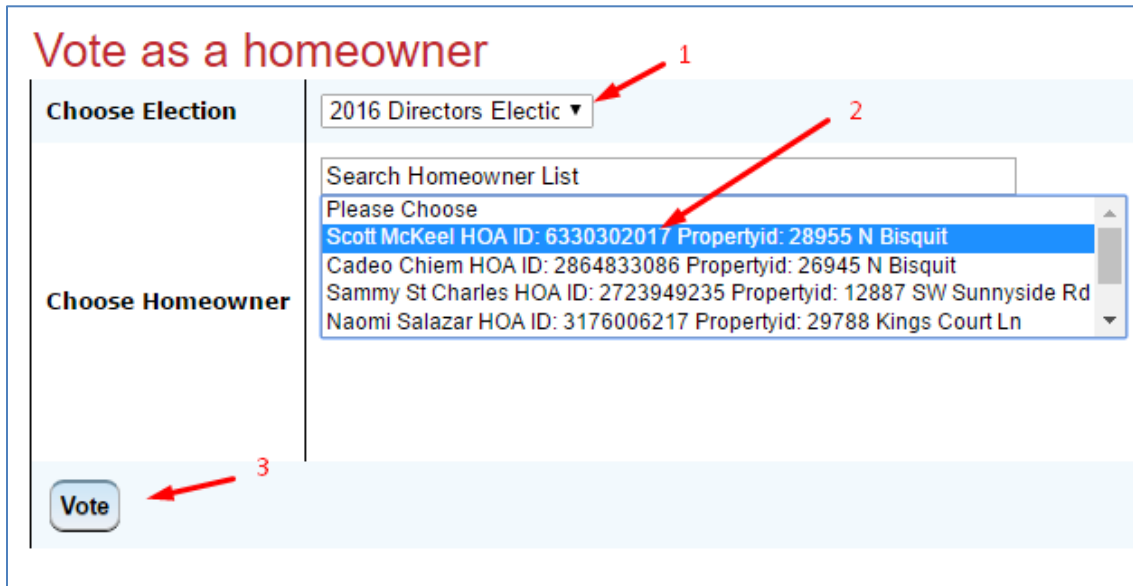
| | | |
|----------|---|---|
| required | Issue: | <input type="text" value="Amendment to Article I section D of the CC&Rs"/> |
| required | Text For "Yes" Vote: | <input type="text" value="YES"/> |
| required | Text For "No" Vote: | <input type="text" value="NO"/> |
| required | Allow "Abstain" Vote: | <input type="checkbox"/> |
| required | Issue Description or Language of the Amendment: | <div><p>The Covenants, Conditions and Restrictions Article I: section (D) amendments to the CC&R's the board of directors for the association to have the authority the bring a vote to change the documents and bylaws. A vote must be brought to the owners in either ballot form and or electronic voting process. In order for the vote to pass 65% of the members in the association must vote to pass the vote or it will fail.</p><p>Amendment to Section (1) 1.4 Rental Restrictions: Amendment decreases the percentage currently allowed from 50% rentals to 25% rentals allowed in the community starting on January 1st. This change will allow owners to seek multiple loan resources.</p><p>Old Language CC&R's recorded June 1995: Section (1) 1.4 Rental Restrictions: The maximum number of rental properties shall not exceed 50%. Any rental must be approved by the board of directors.</p><p>New Language CC&R's revision if passed will record in 2016: Section (1) 1.4 Rental Restrictions: The maximum number of rental properties shall not exceed 25%. Any owner of a rental property will need to seek approval in writing from the board of directors. The board will have 15 days from the date of receipt of the request to process the paperwork and render a decision.</p></div> |

Vote as a Homeowner

Vote as a homeowner provides a way to record any physical ballots received so that the electronic system tabulates those results too. It has the added benefit of preventing any more emails for that ballot/election being sent to that owner as well as preventing the owner from casting a vote electronically.

Vote As A Homeowner

Select **Vote As A Homeowner** from the main menu. Select, "Choose Election", "Choose Homeowner" to vote for and then click the "Vote" button.



Vote as a homeowner

Choose Election 2016 Directors Electic

Choose Homeowner

Search Homeowner List

Please Choose

- Scott McKeel HOA ID: 6330302017 Propertyid: 28955 N Bisquit
- Cadeo Chiem HOA ID: 2864833086 Propertyid: 26945 N Bisquit
- Sammy St Charles HOA ID: 2723949235 Propertyid: 12887 SW Sunnyside Rd
- Naomi Salazar HOA ID: 3176006217 Propertyid: 29788 Kings Court Ln

Vote

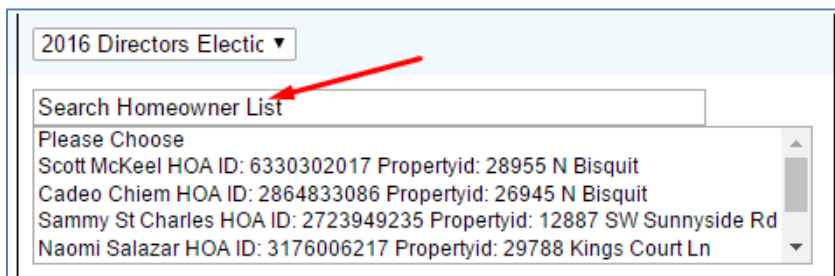
The ballot will then be displayed, there will be one option that's not on the regular ballot.

Voting in Person, **Voting in Person** will:

- Stop any more emails reminder/invite emails from being sent to this owner regarding this election.
- Prevent them from casting another ballot.
- If an email was provided for the homeowner, they will receive an email confirming they will be voting in person.

Choose the option you want (**no example is shown of a ballot due to there being many possible differences**) and follow the prompts.

The "Search Homeowner List" searches for, First & Last Names, HOA ID, Registration Code and Property ID. That information will only be there if it was included in the owner data that was loaded.



2016 Directors Electic

Search Homeowner List

Please Choose

- Scott McKeel HOA ID: 6330302017 Propertyid: 28955 N Bisquit
- Cadeo Chiem HOA ID: 2864833086 Propertyid: 26945 N Bisquit
- Sammy St Charles HOA ID: 2723949235 Propertyid: 12887 SW Sunnyside Rd
- Naomi Salazar HOA ID: 3176006217 Propertyid: 29788 Kings Court Ln

Casting a ballot for a homeowner/voter will:






- Cause an email confirming the selections that were made to go to the email address of the homeowner, providing one exists for that owner record.
- Tabulate the choices along with the rest of the result data.
- The CSV result files will contain information in columns for:
 - “Administration Information” Will display the email address of the admin that voted.
 - “Voting In Person” will have a “yes” if that option was selected. (only available in who voted report).
 - “Do Not Notify” will have a “yes” if that option was selected. (only available in who voted report).

Voting Results

To view results click [Voting Results](#), then choose the election. NOTE: If there are no results, there will be no election to choose.

In the following example an election/ballot with a candidate vote and 1 issue (yes/no) vote is running.

The screen will show you how many voters have voted (both weighted and un-weighted) and how many votes each candidate has as well as how many yes & no votes each issue has.

| General Status of Voting | | | Candidate Votes | | Issue Votes | | | Get Csv Of Candidate Results |
|--|----------------------------|---------------|--|-------|---------------------|--|---|--|
| Voters Who Have Cast Ballots | Imported Accounts | Percent Voted | Candidate | Votes | Rental Amendment... | I agree to amend Section (1) 1.4 Rental Restrictions | I do not agree to amend Section (1) 1.4 Rental Restrictions | Get Csv Of Issue Results |
| 8 | 10 | 80.00% |  Mary Moore | 5 | | 9 | 1 | Get Csv Of Who Voted |
| Voters Who Have Cast Ballots Weighted | Imported Accounts Weighted | Percent Voted |  William Garcia | 9 | | | | Get Csv Of Who Hasn't Voted |
| 15 | 17 | 88.24% |  Teresa Martin | 10 | | | | Get Csv Of Proxies |
| Voters Who Have Cast Ballots | Registered Voters | Percent Voted |  Jim Stevens | 5 | | | | Send Email To All Voters W/ Email Who Haven't Voted Yet. |
| 8 | 8 | 100.00% |  Ian Jones | 6 | | | | |
| General Election Information Registered, Unregistered / with Email Quorum Only, Do Not Notify Again And Proxies | | | | | | | | |

There are reports available in CSV format listed on the far right

| |
|--|
| Get Csv Of Candidate Results |
| Get Csv Of Issue Results |
| Get Csv Of Who Voted |
| Get Csv Of Who Hasn't Voted |

The information in these reports will vary in a SECRET vs NON-SECRET election.

In a NON-SECRET ballot the reports [Get Csv Of Candidate Results](#) and [Get Csv Of Issue Results](#) will show all information, including who voted and how they voted. The information includes the owner data that was imported into the system, the info the voter provides when they register, the date & time of when the ballot was cast, the IP address they voted from and more.

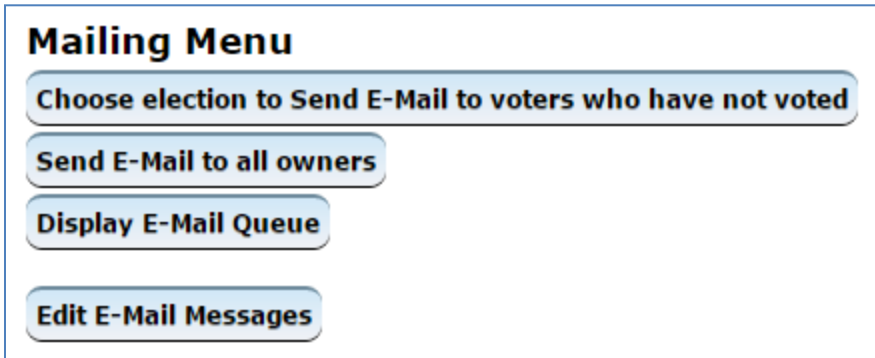
In a SECRET ballot [Get Csv Of Candidate Results](#) and [Get Csv Of Issue Results](#) exclude all voter information.

For both SECRET and NON-SECRET [Get Csv Of Who Voted](#) provides a list of voters that have cast a ballot. [Get Csv Of Who Hasn't Voted](#) provides a list of voters that have not yet voted.

Email Owners

This area provides a way to compose messages and send those messages to voters that have an email address. The email address may have been uploaded with the owner data or provided by the voters that have registered (created an account).

Clicking **Email Owners** from the main navigation menu will display the following sub-menu:



Choose election to Send E-Mail to voters who have not voted, will present a list of elections/ballots that are currently active. Selecting one will go to the email sending screen, any message sent from there will go to owners/voters that have not yet voted in the selected election.

Send E-Mail to all owners, goes to the email sending screen, any message sent from there will go to all voters that have an email address.

Display E-Mail Queue, displays messages that are in the queue waiting to be sent.

Edit E-Mail Messages, displays a list of existing messages and provides a way to edit, preview, and create new messages.

Editing Messages

Click **Edit E-Mail Messages** and the following screen will be displayed

Edit Site Pages

Editable Mailings In This Site

Add Message Named:

Add File If the file exists, the name will have a number added to it to make unique.

- Index**
 - Preview
 - Index* is copied when making a new file and cannot be deleted.
- Reminder**
 - Preview
 - Delete *Reminder*
- Invite**
 - Preview
 - Delete *Invite*

Now editing: Mailing: Invite **Save Changes**

Manage Images

Edit Insert View Format Table Tools

Formats B I U S [List Icons]

2015 Directors Election

Dear ##NAME##,

Your community needs your participation to elect this year new board members.

Voting online makes this easy and quick.

Please [CLICK HERE](#) to go to the voting site, your code to register is: ##REGCODE##

Thank you,

Jane Doe - Community Manager

To add a file, type in the name of the file and click “Add File” as shown in the following image

Add Message Named:

Add File If the file exists, the name will have a number added to it to make unique.

To edit any file click on the file name and it will load in the editor


Sending Messages

Choose election to Send E-Mail to voters who have not voted, and **Send E-Mail to all owners**, displays the following screen

Create Mailings

Sending email to all voters who have not yet voted on **2015 Directors Election**

Send Now
Send Later

Send first message on: **Midnight Pacific Time**
2015-11-30
(YYYY-MM-DD) 

Send Until Election Is Finished? OR

Send How Many Times? One Time ▾

From Name Demo 2 Voting Administrator

From Email demo2@ivotehoa.com

Subject

File To Send: Please Choose ▾

Filter:
 All
 Registered
 Un-Registered

List Of Email Addresses To Send To (One Per Line):
Information for reference only. Addresses will be chosen at run time from the homeowners eligible to vote in the election who have not yet voted and who have not been marked as "do not send email in " [Homeowner Setup](#)

```
test10@votehoanow.com
```

Submit

Edit E-Mail Messages

Sample message.

Reload Sample

From the screen above, messages can be sent immediately or queued to go at a later time as well as set to repeat. If an election was selected any message sent from here will only be sent to email addresses of owners that have not voted in the selected election.


Choosing “**Send Now**” will eliminate the choices for queuing messages to be sent at a later time

Create Mailings

Sending email to all voters who have not yet voted on **2015 Directors Election**

[Edit E-Mail Messages](#)

Sample message

| | |
|--|--|
| Send Now <input checked="" type="radio"/> |  |
| Send Later <input type="radio"/> | |
| From Name | Demo 2 Voting Administrator |
| From Email | demo2@ivotehoa.com |
| Subject | <input type="text"/> |
| File To Send: | Please Choose ▾ |
| Filter: | <input checked="" type="radio"/> All <input type="radio"/> Registered <input type="radio"/> Un-Registered |

List Of Email Addresses To Send To (One Per Line):

Information for reference only. Addresses will be chosen at run time from the homeowners eligible to vote in the election who have not yet voted and who have not been marked as "do not send email in " [Homeowner Setup](#)

test10@votehoanow.com

If **“Send Later”** is selected then the options to choose a date and repeat the message will remain visible

Create Mailings
Sending email to all voters who have not yet voted on **2015 Directors Election**

Send Now
Send Later

Send first message on: **Midnight Pacific Time**
2015-11-30
(YYYY-MM-DD)

Send Until Election Is Finished?
OR

Send How Many Times? One Time

All queued messages will be sent at Midnight Pacific Time (12:00 AM) on the selected date.

Selecting **“Send Until Election Is Finished?”** will display a menu for choosing how often the message will be sent.

Send Until Election Is Finished?

Send How Often? Every week

From Name

From Email

Selecting **“Send How Many Times?”** presents a list of the number of times to send the message.

Send How Many Times? Two Times

Send How Often? Every week

From Name

The **“Send Until Election Is Finished? Is also presented with this choice.**

Send How Many Times? Two Times

Send How Often? Every week

From Name

From Email

To send messages more frequently than every week use the **“Send Now”** or queue additional messages and start them on different dates.

Proceeding now to the next step enter a **“Subject”** for the message and choose the file to send.

| | |
|----------------------|--|
| Subject | 2015 Directors Election |
| File To Send: | Please Choose Please Choose Invite Reminder |
| Filter: | |

The system comes with 2 messages “Invite “ and “Reminder” which are intended to be used as examples.

- Invite is intended to be sent to voters that **have NOT REGISTERED**, it has the special tags **##NAME##** and **##REGCODE##** which will be replaced with information from the database. **##NAME##** looks to the First Name and Last Name fields for that information. If that information was not imported replace **##NAME##** with “Dear Resident” or something similar. **##REGCODE##** will display the voters registration code, the Invite message includes a link that goes directly to the page where the registration code is used.
- Reminder is intended to be sent to voters **that have REGISTERED** aka created an account but have not yet voted in an election/ballot, it has the special tags **##NAME##** and **##EMAIL##** and includes a link that goes to the login page.

Copies of the Invite and Reminder messages that come with the system are shown on the next page.

INVITE

2015 Directors Election

Dear ##NAME##,

Your community needs your participation to elect this year new board members.

Voting online makes this easy and quick.

Please [CLICK HERE](#) to go to the voting site, your code to register is: **##REGCODE##**

Thank you,

Jane Doe – Community Manager

REMINDER

Directors Election - Voting Reminder

Dear ##NAME##,

This is a reminder to to ask you to please vote in this year's BOD election.
Go to this web address <https://demo2.ivotehoa.com> and sign in to vote.

The email address you sign on with is ##EMAIL##.

Thank you,

Jane Doe - Community Manager

Voter Troubleshooting

The most common requests/issues heard from voters are:

- My registration code doesn't work
- I can't sign in with my email
- I can't remember my password and the reset password link doesn't work.

99.9% of the time these are due to typos on the voter's part.

Testing Registration Codes

The easiest way to test a registration code is to go to the registration page and try typing in the code,

Home

Already Registered to Vote Online?
Please sign in using the email address and password you registered with

Email

Password

Can't remember your password? to send a reset link to your email.

Not yet registered for online voting? to get signed up.

Register to Vote

if you DO NOT know your registration code or need other assistance.

Enter your Code:

If the code exists and HAS NOT BEEN USED the "Create Your Account" form is displayed:

Create Your Account

required

First name:

Last name:

Telephone:

Email: A confirmation will be sent to this email.

Email Again To Verify:

Set A Password: (minimum 8 characters) [Toggle Visibility Of Typing](#)

Type Password Again To Verify:

If the code does not exist “**Not a Valid Registration Code**” is displayed:

Not a Valid Registration Code
Register to Vote
Contact your Homeowners Association if you DO NOT know your registration code or need other assistance.
Enter your Code:
Next

If the code has already been used “**Account already set up; log in please.**” Is displayed:

Account already set up; log in please.
Register to Vote
Contact your Homeowners Association if you DO NOT know your registration code or need other assistance.
Enter your Code:
Next

Alternatively you can look up the registration code from the **Homeowners** section of administration screen. Use **Search Homeowners** to locate the voter/homeowner record. A partial search works for any field, for example typing in “00” in the “**Registration Code is like**” box will display all registration codes with 2 zeros ANYWHERE in the code.

Admin Home Page

- Homeowners** (indicated by a red arrow)
- Import Homeowners
- Search Homeowners** (indicated by a red arrow)
- Export Homeowners
- Export Only Registered Homeowners
- Delete With List

Election/Ballot Management

- Vote As A Homeowner
- Voting Results
- Email Owners
- Contact Form Information

Log Out

Search for homeowners

Email is like

OR

First Name is like

OR

Last Name is like

OR

Registration Code is like (indicated by a red arrow)

OR

Property ID is like

OR

HOA Account ID is like

OR





Information is like

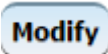
Search (indicated by a red arrow)

A list of the search results from the above search:

Sorted first by whether they have a password set or not, and then by HOA Account ID

Display 1 to 2 of 2 Per page < First • Previous • Next • Last >

| Modify | Delete | HOA Account ID | Property Id | Weight | Registration Code | Information | Email & Name |
|---|---|----------------|-----------------------|--------|-------------------|-----------------|---------------------------------------|
|  |  | 2000199869 | 11014 SW Sunnyside Rd | 4 | 2000199869 | David P Johnson | test7@votehoanow.com Bob Johnson |
|  |  | 3176006217 | 29788 Kings Court Ln | 1 | 3176006217 | Naomi Salazar | test3@votehoanow.com Naomi Salazar |

Clicking  will show the record details, if a password has been set that means they have created an account.

Modify Homeowner

| | |
|--|---|
| HOA Account ID | <input type="text" value="2000199869"/> |
| Property Id | <input type="text" value="11014 SW Sunnyside Rd"/> |
| Weight | <input type="text" value="4"/> |
| Registration Code <small>Use "new code" to create a new random code.</small> | <input type="text" value="2000199869"/> |
| Information | <input type="text" value="David P Johnson"/> |
| Email | <input type="text" value="test7@votehoanow.com"/> |
| First Name | <input type="text" value="Bob"/> |
| Last Name | <input type="text" value="Johnson"/> |
| Telephone | <input type="text"/> |
| Password <small>(Leave empty unless changing)</small> | <input type="text"/> A password has been set. |
| Send Email? <small>Checking "No" will keep this account from receiving any email from the "Email Owners" options.</small> | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Suspend Voting Reminders | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| <input type="button" value="Save Changes To Account"/> | |

Verifying Email Addresses

Use the administration screen and search for the homeowner/voter as in the example above. Remember the most common mistake is a typo on the homeowner's part, if the record cannot be found by the email address expected try searching by something else. We recommend searching by something that was part of the owner data that was imported for a reliable search.

Password Reset Request

The password reset link works as long as:

1. The homeowner/voter has created an account.
2. The email address they enter is the one that was used to create the account.

When the 2 conditions above are true, entering the email address and clicking "CLICK HERE"

Already Registered to Vote Online?

Please sign in using the email address and password you registered with

Email

Password

Can't remember your password? [CLICK HERE](#) to send a reset link to your email.

Not yet registered for online voting? [CLICK HERE](#) to get signed up.

Will display the following message:

A link has been sent to your email to reset your password. It will only be good for 1 hour.

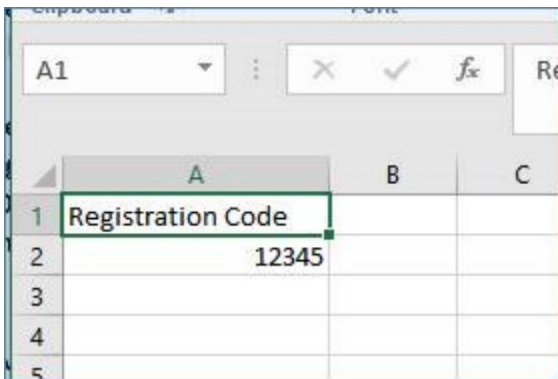
If you do not receive a reset link here are some reasons why that might happen.

- You haven't registered yet. [Create Your Account.](#)
- Your account has been deleted or rendered inactive by the elections manager.

Delete Votes

The first step is to create a 1 column spreadsheet of the people whose votes you wish to delete using one of these choices:

- Registration Code
- HOA ID
- Email



Name the first row appropriately i.e. Registration Code, HOA ID, or Email
Save the file in CSV format

1. In the admin go to Homeowners,
2. Delete With List.
3. Choose what the file you are using contains, the default is "Registration Codes".
4. Choose File
5. Select "Only delete votes, not accounts"
6. Select the "Election to delete from" or leave it at "All Elections" if that's what you want. (Note this routine will delete votes from ALL non-archived elections)
7. Click "Upload File"

Homeowners ← 1

- Import Homeowners
- Search Homeowners
- Export Homeowners
- Export Only Registered Homeowners
- Delete With List ← 2

Election/Ballot Management

- Vote As A Homeowner
- Voting Results

NOTE!!! Deleting accounts WILL NOT delete votes. To delete both you must delete the votes first, then the accounts. Deleted votes ARE ARCHIVED under "Voting Results" "Archived Election Reports".

File contains: Registrations Codes ▾ (one per line) ← 3

Browse for file with list of deletions: ← 4

Choose File Delete Test.csv

Only delete votes, not accounts. ← 5

Election to delete from: All Elections ▾ ← 6

File has a header row.

Upload File ← 7

Providing the owner data file contains the correct information the next page will display the people whose votes will be deleted, a separate line for each vote they cast will be displayed on the screen.


Confirm by clicking "Delete These Votes"

Are you sure you want to delete the following votes?

| Election | Name | Regcode | Property ID | HOA ID | Email |
|-------------------------|-----------|------------|-------------|------------|----------------------|
| 2016 Directors Election | Bob Jones | 3703220110 | Lot # 205 | 3703220110 | test1@votehoanow.com |
| 2016 Directors Election | Bob Jones | 3703220110 | Lot # 205 | 3703220110 | test1@votehoanow.com |

Delete These Votes ←

If the file does not contain data that matches what's in the database, this error message will be displayed.

No records were found that matched the homeowners you supplied. 

Delete accounts OR votes using a 1 column file of Registration Codes, HOA Account Id's, or Email Addresses.

NOTE!!! Deleting accounts WILL NOT delete votes. To delete both you must delete the votes first, then the accounts. **Deleted votes ARE ARCHIVED** under "Voting Results" "Archived Election Reports".

File contains: (one per line)

Browse for file with list of deletions:

No file chosen

- Only delete votes, not accounts.
- File has a header row.

NOTE!!! Deleting accounts WILL NOT delete votes. To delete both, delete the votes first, then the accounts. **Deleted votes ARE ARCHIVED** under "Voting Results" "Archived Election Reports".

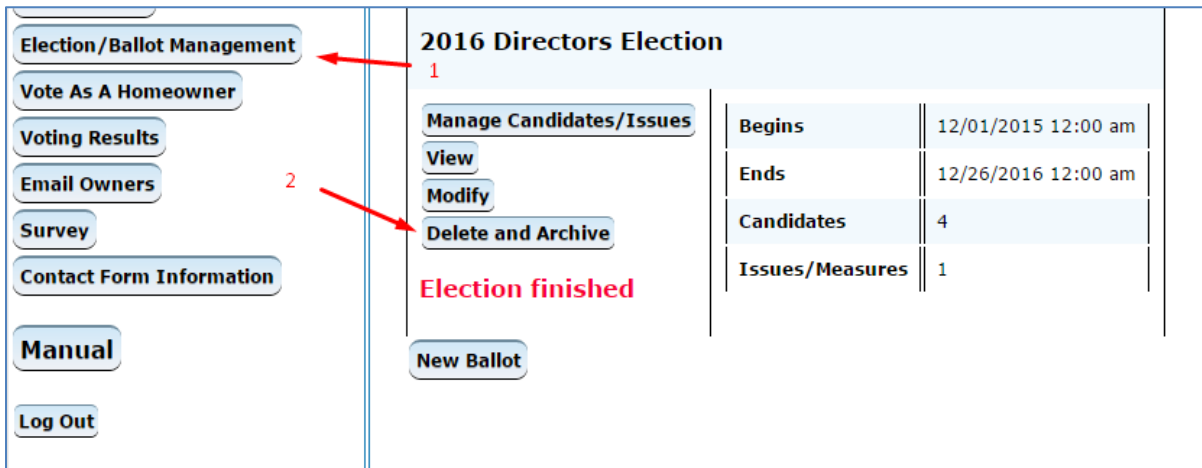
Delete and Archive Elections/Ballots

Once an election is over and BEFORE updating owner information which will probably happen before the next election be sure and delete and archive any past elections.

This will delete the election from the election/ballot management screen and archive the results in CSV files.

To do this choose

1. Election/Ballot Management
2. Delete and Archive



2016 Directors Election

1

Manage Candidates/Issues

View

Modify

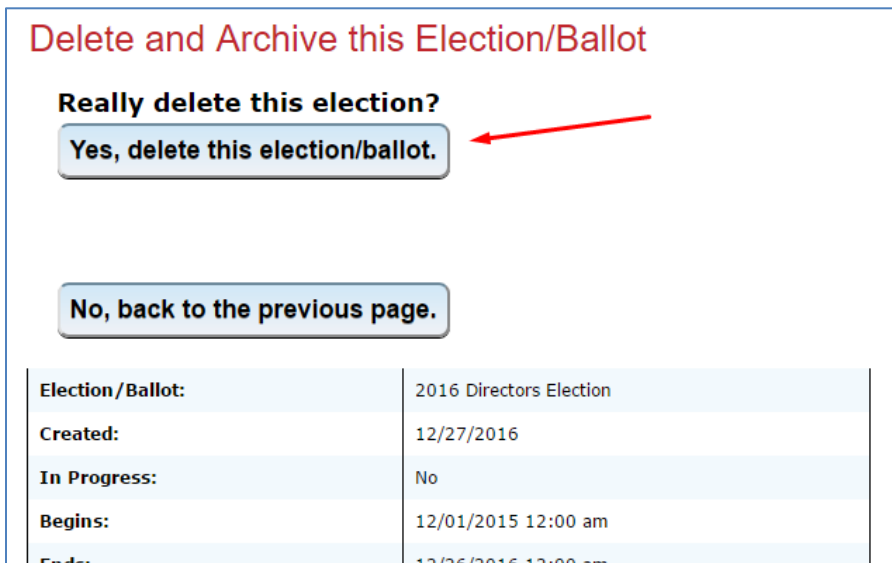
Delete and Archive

Election finished

New Ballot

| | |
|-----------------|---------------------|
| Begins | 12/01/2015 12:00 am |
| Ends | 12/26/2016 12:00 am |
| Candidates | 4 |
| Issues/Measures | 1 |

The next page will show you the election being deleted and ask you to confirm by clicking “Yes, delete this election/ballot”



Delete and Archive this Election/Ballot

Really delete this election?

Yes, delete this election/ballot.

No, back to the previous page.

| | |
|------------------|-------------------------|
| Election/Ballot: | 2016 Directors Election |
| Created: | 12/27/2016 |
| In Progress: | No |
| Begins: | 12/01/2015 12:00 am |
| Ends: | 12/26/2016 12:00 am |

Appendix A – Survey Manual

NOTICE 6/20/17

Anonymous survey features are currently disabled.

No anonymous surveys can be run at this time.

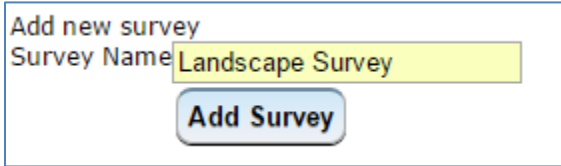
Please check back for future updates.

Surveys

To begin, from the admin menu click **Survey**.

Create New Survey

From the survey sub-menu choose **Create New Survey** enter the name of the survey in the box and click the Add Survey button:



Add new survey
Survey Name
Add Survey

The survey will be added and you'll be taken to the main page (where you started) and the survey that was just added will be displayed in the page:

| Survey Name | Preview | Added | Active | Responses | Questions | Modify | Delete |
|------------------|----------------|------------|-----------------|--------------|------------------|---------------|---------------|
| Landscape Survey | Preview | 07/18/2016 | Activate | No Responses | Questions | Modify | Delete |

Modify Survey

Click **Modify** to complete the survey setup.

Click to view results for a survey by date or to modify a survey not yet made active. Once a survey has been set to be active

| Survey Name | Preview | Added | Active | Responses | Questions | Modify | Delete |
|------------------|----------------|------------|-----------------|--------------|------------------|---------------|---------------|
| Landscape Survey | Preview | 04/27/2017 | Activate | No Responses | Questions | Modify | Delete |

Modify Survey

Survey name:

Description:

Edit | Insert | View | Format | Table | Tools

Formats | **B** | *I* | U | ~~S~~ | [List Icons]

[Link] [Image] [Eye] [Table] [Color] [Font] [Smiley]

Add instructions and any explanatory text for the survey in this area

p Words: 12

Start Date: (YYYY-MM-DD) [Calendar]

Start Time: (Pacific Time) [Dropdown]

End Date: (YYYY-MM-DD) [Calendar]

End Time: (Pacific Time) [Dropdown]

Add Attachment ← Add any attachments

Require users to login to take this survey: ← Check this box to require users login, leave it unchecked for anonymous surveys

Save Changes To Survey ← Save changes

*NOTE, times are set in the PACIFIC timezone
Be sure and adjust according to your timezone*

Anonymous and Login Required Surveys

The default setting for surveys is anonymous “Require users to login to take this survey” is unchecked, this means several things:

- You cannot tell who took the survey.
- If someone were to send the link for the survey to someone else, they could take it too.
- If a person clears their cookies, they could take the survey again.

Add Attachments

Click **Add Attachment** in the above screen displays this:

Click filename to change

Choose a file...

Clear Filename

Click here to choose a file

Edit Insert View Format Table Tools

Formats B I U S

Enter a description of the file
NOTE: A good file name may be all you need.

p Words: 0

Click on choose a file (shown above) and pick a file that’s already been uploaded, or upload a new file.

MoxieManager

Create Upload Manage

File Systems

- contact-us
- images
- localimages
- pamphlets
- survey

| Filename | Size | Type | Modification date |
|---------------------|--------|------|---------------------|
| 2015 candidates.pdf | 431 KB | pdf | 11/12/2015 08:56:15 |
| Survey Manual.pdf | 916 KB | pdf | 04/27/2017 14:39:50 |

1. Select from files that have been uploaded

Upload new files

2. Insert the file

Insert Close

Add Questions

The next step is to add the questions to the survey, click on **Questions** to begin:

Add Question to: *Landscape Survey*

| | | | | | | | |
|--|--|------------------------------------|-------------------|--|-------------------------|-----------------------------------|---|
| Question | What Color Flowers Would You Like To See Around The Community Monument? | | | | | | |
| Type | <table><tr><td>Radio <input type="radio"/></td><td>one answer choice</td></tr><tr><td>Checkbox <input checked="" type="radio"/></td><td>multiple answer choices</td></tr><tr><td>Rank <input type="radio"/></td><td>multiple answers to be ranked by preference</td></tr></table> | Radio <input type="radio"/> | one answer choice | Checkbox <input checked="" type="radio"/> | multiple answer choices | Rank <input type="radio"/> | multiple answers to be ranked by preference |
| Radio <input type="radio"/> | one answer choice | | | | | | |
| Checkbox <input checked="" type="radio"/> | multiple answer choices | | | | | | |
| Rank <input type="radio"/> | multiple answers to be ranked by preference | | | | | | |

Add Question

Enter the question in the box and select the type of answer you want then click

Add Question

The choices are described as follows:

- Radio, this is a single choice answer where a user has several choices but can only select one.
- Checkbox, this is a multiple choice answer where a user has several choices and can select one or all of them if they like.
- Rank, this will cause a drop down menu to appear where a user can rank choices/answers in order of preference.

Add Answers

Once one or more questions have been added, answers can be added to the questions.

Click the **View/Add** to add answers to a question.

| question text | question type | Answers | Modify | Delete |
|---|---------------|-------------------|---------------|---------------|
| What Color Flowers Would You Like To See Around The Community Monument? | checkbox | 6 View/Add | Modify | Delete |
| Would You Like the Association to Pay for Street Tree Trimming? | radio | 2 View/Add | Modify | Delete |
| How Important are Sidewalk Repairs to You? | rank | 3 View/Add | Modify | Delete |

Add new Answer for *What Color Flowers Would You Like To See Around The Community Monument?*

Answer Text

Requires Additional Response Yes No

Add Answer

Add new Answer for *What Color Flowers Would You Like To See Around The Community Monument?*

Answer Text

Requires Additional Response Yes No

Add Answer

Note: choosing Yes to “Requires Additional Response” will add a text box to the survey where a user can type in a response.

Preview & Activate

Once the questions and answers have been added, preview the survey from the main survey screen and once it’s ready click “Activate” to make it available for people to take it.

All current surveys

Click to view results for a survey by date or to modify a survey not yet made active. Once a survey has been set to be active it can no longer be modified.

| Survey Name | Preview | Added | Active | Responses | Questions | Modify | Delete |
|------------------|----------------|------------|-----------------|--------------|------------------|---------------|---------------|
| Landscape Survey | Preview | 07/18/2016 | Activate | No Responses | Questions | Modify | Delete |

Preview screen shown below.....

WARNING: Once the survey has responses do not add or remove questions or delete homeowner accounts as this will skew the results. Removing accounts/homeowners does not delete responses from a survey.

The Survey that was created for this manual has 3 questions, one for each type of question. The following is the Preview of this survey.

Survey Sample (back)
Landscape Survey ← Survey Name
← Accompanying Text
Add instructions and any explanatory text for the survey in this area

Attachment: Survey Manual ← Attachments

What Color Flowers Would You Like To See Around The Community Monument?
(Check all that apply) ← Multi Choice Question

- Red
- Blue
- Green
- Yellow
- Orange
- Purple
- Other

Additional Comments

Enter comments here

Would You Like the Association to Pay for Street Tree Trimming?
(Check One) ← Single Choice Question

- Yes
- No

How Important are Sidewalk Repairs to You?
(Rank your choices) ← Ranking Question

2 ▼ Very Important

| | |
|---------|----------------------|
| unset ▼ | Somewhat Important |
| unset | |
| 1 | Not Important at All |
| 3 | |

Announce The Survey

The page/web address to send people to for taking the survey is the address of the voting site plus, /survey.

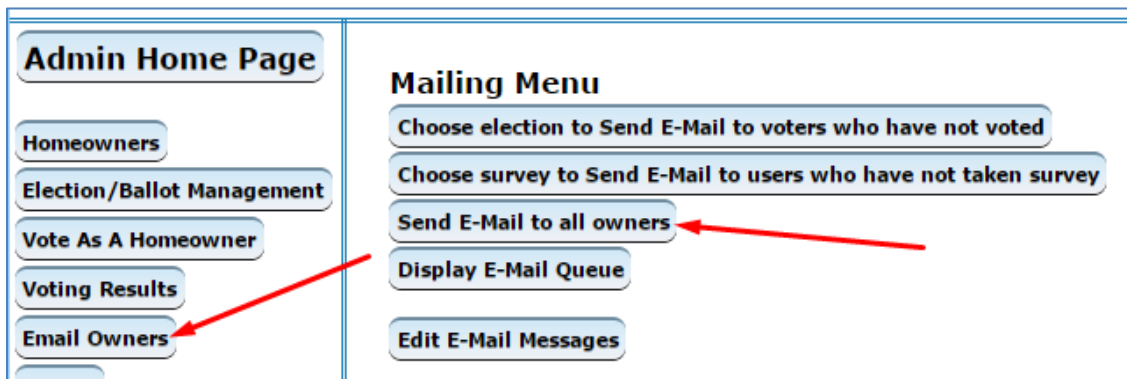
That means <https://WHATEVER.ivotehoa.com/survey> where WHATEVER is unique to the community voting website (hint, look at the address bar).

Anonymous Survey – No Login Required

If the survey is anonymous (not requiring a login) the message can simply reference/contain the link to the survey page.

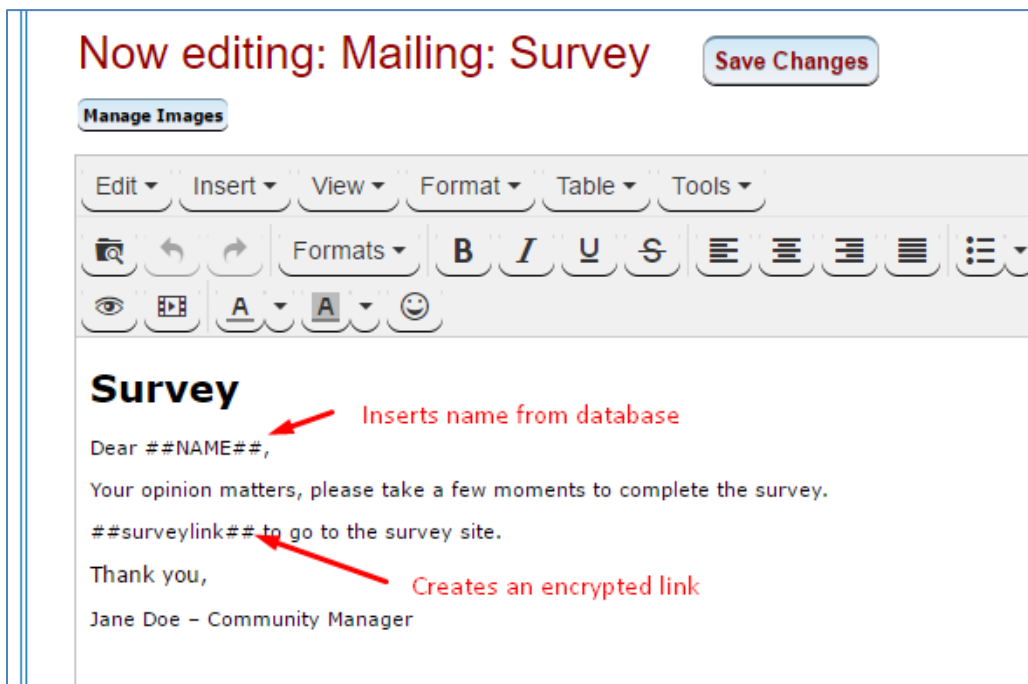
Use **Send E-Mail to all owners** to send anonymous survey announcements.

NOTE: Choose survey to Send E-Mail to users who have not taken survey does not work with anonymous surveys since there is no way to tell who hasn't taken a survey.



Login Required Survey

For these messages use the encrypted link method to bypass the login and account creation forms, the link will remain usable until the survey is taken, or until it's over. To use it include, ##surveylink## when composing the message.



NOTE: Owners that were loaded WITHOUT an email address can go to survey page (<https://WHATEVER.ivotehoa.com/survey>) and register to take the survey.

Sending Login Required Survey Messages

From the **Email Owners**, select: **Choose survey to Send E-Mail to users who have not taken survey** to display all ACTIVE surveys, in this example there is only one active survey:

Choose Survey To Send Email To Users Who Have Not Yet Taken Survey

Landscape Survey

Selecting a survey will take you into the “Create Mailings” page:

Create Mailings

Edit E-Mail Messages

Send Now **Send Later**

Send message on: **Midnight Pacific Time** 2016-07-26
(YYYY-MM-DD)

From Name Vote HOA Now eVoting Administrator

From Email demo2@ivotehoa.com

Subject

File To Send: Please Choose

Filter:

All **Registered** **Un-Registered**

List Of Email Addresses To Send To (One Per Line):

Email addresses can be added to, or removed from, this list. When the list has been edited the only substitution that can be done in a message is the email but as a trade-off you are not limited to using the list as is. You can add to and remove from the list as needed.

```
test16@votehoanow.com
test7@votehoanow.com
test2@votehoanow.com
test8@votehoanow.com
test11@votehoanow.com
test14@votehoanow.com
test5@votehoanow.com
test10@votehoanow.com
test1@votehoanow.com
test3@votehoanow.com
```

Sample message.

Choose Send Now or Later, if Later is selected, select the date to send it. All “Later” messages are sent at Midnight Pacific Time.

Enter a subject, this is the subject line in the email that’s being sent.

Choose the file to send, the file is the message that you composed/created using the editor.

Select the filter:

All goes to everyone in the database whether they are registered or not. This can be used for anonymous surveys where no login is required.

Registered goes to people that have created an account, the message should include ##EMAIL## for this group.

Un-Registered is for people that have not created an account, the message should include ##REGCODE## for this group.

Sending Anonymous Survey Messages

Since there is no way to know who took an anonymous survey there is also no way to choose to send to people that have not taken the survey.

There is also no need to send them their registration code or email address.

That makes the message you compose and sending it much simpler.

From the **Email Owners**, select; **Send E-Mail to all owners** which goes directly to the sending page:

| | |
|---|---|
| <h3>Create Mailings</h3> <p>Send Now <input type="radio"/> Send Later <input checked="" type="radio"/></p> <p>Send message on: Midnight Pacific Time 2016-07-26 (YYYY-MM-DD) </p> <p>From Name Vote HOA Now eVoting Administrator</p> <p>From Email demo2@ivotehoa.com</p> <p>Subject <input type="text"/></p> <p>File To Send: Please Choose ▾</p> <p>Filter:</p> <p><input checked="" type="radio"/> All <input type="radio"/> Registered <input type="radio"/> Un-Registered</p> <p>List Of Email Addresses To Send To (One Per Line): Email addresses can be added to, or removed from, this list. When the list has been edited the only substitution that can be done in a message is the email but as a trade-off you are not limited to using the list as is. You can add to and remove from the list as needed.</p> <pre>test16@votehoanow.com test7@votehoanow.com test2@votehoanow.com test8@votehoanow.com test11@votehoanow.com test14@votehoanow.com test5@votehoanow.com test10@votehoanow.com test1@votehoanow.com test3@votehoanow.com</pre> | <p>Edit E-Mail Message</p> <p>Sample message</p> <p>Choose Send Now or Later, if Later is selected, select the date to send it. All "Later" messages are sent at Midnight Pacific Time.</p> <p>Enter a subject, this is the subject line in the email that's being sent.</p> <p>Choose the file to send, the file is the message that you composed/created using the editor.</p> <p>Select the filter: All goes to everyone in the database whether they are registered or not. This can be used for anonymous surveys where no login is required.</p> <p>Reload Sample</p> |
|---|---|