

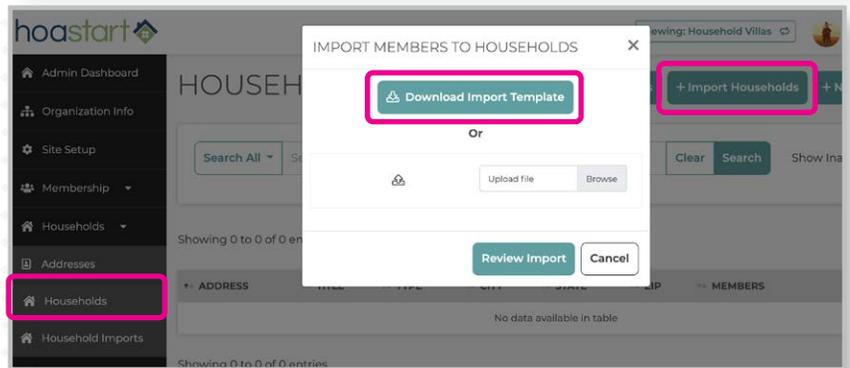
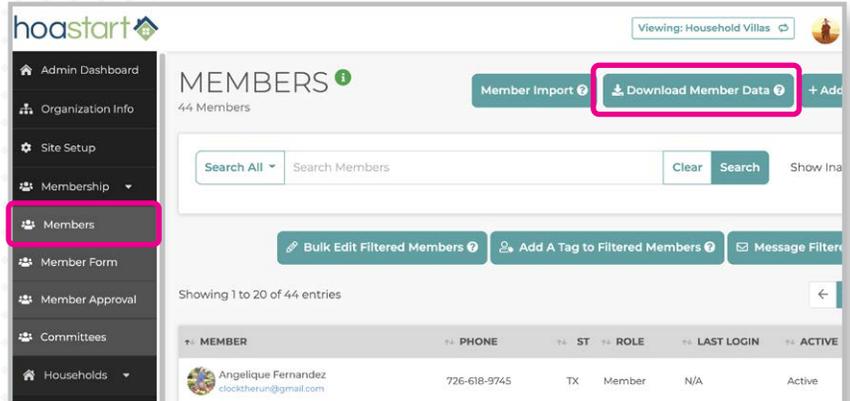
HOUSEHOLDS: IMPORTING EXISTING MEMBERS

If you already have an established community site with existing Members loaded into the system, a great starting point for using the Households feature is to utilize your current member list. This information can be easily repurposed for Households with a few easy steps to create your new household and address information.

If this is the first time you are using the Households feature, please watch the [Households Features Overview](#) video for general setup.

Under the Membership tab, select the Members page from the dropdown menu. Click on “Download Member Data” in the upper right corner of the page. This will download a CSV file with existing members names, emails and addresses that you will need for your household import.

Next, you will need to download a Household Import CSV template. From the Households tab within the Households menu, click on “+Import Household”. From this window you can “Download Import Template” CSV file.



Open both the member export file and households import file. Using a spreadsheet application (i.e., Excel), you can copy members' email addresses, names, and street addresses from the Member export file and paste into the matching columns of the Households import file.

Once this information has been added to the Households file, you will need to assign a “Household Title” to each member in the appropriate field. This is a required field and must be unique for each address. This title could be as simple as a member’s last name or a community lot number for a particular address.

Member export template

| | A | B | C | D | E | F | G | H | I | J |
|----|------------|-----------|------------------------------------|--------------|----------------------|----------------|-------------|-------|-------|------|
| 1 | First Name | Last Name | Email Address | Phone Number | Address Line 1 | Address Line 2 | City | State | ZIP | Tags |
| 2 | Carmela | Figgins | ScentedArenas@gmail.com | 726-451-5548 | 4896 Elm Street | | San Antonio | Texas | 78261 | |
| 3 | Angelique | Fernandez | clocktherun@gmail.com | 726-618-9745 | 1058 Flowing Springs | | San Antonio | Texas | 78261 | |
| 4 | Sanda | Deeks | stylst1980@yahoo.com | 210-419-6500 | 1659 Wicklow Lane | | San Antonio | Texas | 78261 | |
| 5 | Mina | Tiras | toweringbuildings@yahoo.com | 210-563-3849 | 25739 Wicklow Path | | San Antonio | Texas | 78261 | |
| 6 | Jaime | Gonzales | jgwentworth@yahoo.com | 210-356-1468 | 1460 Wicklow Lane | | San Antonio | Texas | 78261 | |
| 7 | Francis | Gonzales | mendacho@gmail.com | 555-555-5555 | 1450 Wicklow Lane | | San Antonio | Texas | 78261 | |
| 8 | Heath | Barret | roundouttheteam@gmail.com | 726-541-6198 | 6759 Elm Street | | San Antonio | Texas | 78261 | |
| 9 | Gary | Wilcox | g.wilcox@wilcoxexpresscleaners.com | 456-789-3214 | 1459 Wicklow Lane | | San Antonio | Texas | 78261 | |
| 10 | Holly | Wilcox | brekkiefordinner@hotmail.com | 210-359-4652 | 1459 Wicklow Lane | | San Antonio | Texas | 78261 | |
| 11 | Meeagan | Guarino | m.guarino@texas-university.edu | 654-654-8635 | 64846 Goode St. | | San Antonio | Texas | 78261 | |

Household and Addresses import template

| | A | B | C | D | E | F | G | H | I | J | K |
|----|------------------------------------|------------|-----------|-----------------|-------------|------------|----------------------|----------------|-------------|-------|-------|
| 1 | Address | First Name | Last Name | Household Title | Access Type | Lot Number | Address Line 1 | Address Line 2 | City | State | ZIP |
| 2 | ScentedArenas@gmail.com | Carmela | Figgins | Figgins 1 | | | 4896 Elm Street | | San Antonio | Texas | 78261 |
| 3 | clocktherun@gmail.com | Angelique | Fernandez | Fernandez 1 | | 12 | 1058 Flowing Springs | | San Antonio | Texas | 78261 |
| 4 | stylst1980@yahoo.com | Sanda | Deeks | Deeks 1 | | 57 | 1659 Wicklow Lane | | San Antonio | Texas | 78261 |
| 5 | toweringbuildings@yahoo.com | Mina | Tiras | Tiras 1 | | 42 | 25739 Wicklow Path | | San Antonio | Texas | 78261 |
| 6 | jgwentworth@yahoo.com | Jaime | Johnson | Johnson 1 | Renters | 33 | 1460 Wicklow Lane | | San Antonio | Texas | 78261 |
| 7 | mendacho@gmail.com | Francis | Johnson | Johnson 1 | Renters | 33 | 1460 Wicklow Lane | | San Antonio | Texas | 78261 |
| 8 | roundouttheteam@gmail.com | Heath | Barret | Barret 1 | | 19 | 6759 Elm Street | | San Antonio | Texas | 78261 |
| 9 | g.wilcox@wilcoxexpresscleaners.com | Gary | Wilcox | Wilcox 1 | | 54 | 1459 Wicklow Lane | | San Antonio | Texas | 78261 |
| 10 | brekkiefordinner@hotmail.com | Holly | Wilcox | Wilcox 1 | | 54 | 1459 Wicklow Lane | | San Antonio | Texas | 78261 |
| 11 | m.guarino@texas-university.edu | Meeagan | Guarino | Guarino 1 | | 87 | 64846 Goode St. | | San Antonio | Texas | 78261 |

HOUSEHOLDS: IMPORTING EXISTING MEMBERS - CONTINUED

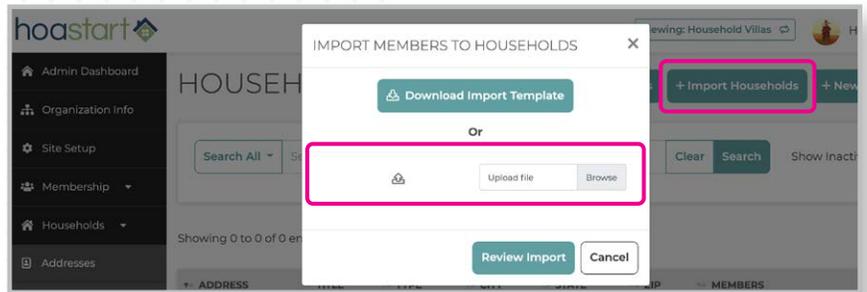
- ◆ We recommend keeping each Household Title unique to help organize your information. If two households share the same last name, we suggest including an extra numeric identifier, if last names are used to differentiate them (i.e., Johnson 1, Johnson 2).

To include multiple members in the same household, each member's Household Title and full address must match exactly. Slight variations in title or address will result in the creation of a separate household.

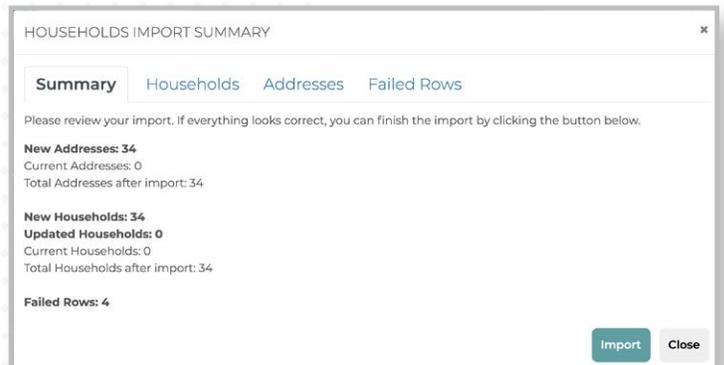
| | A | B | C | D | E | F | G | H | I | J | K |
|----|------------------------------------|------------|-----------|-----------------|-------------|------------|----------------------|----------------|-------------------|-------|-------|
| 1 | Email Address | First Name | Last Name | Household Title | Access Type | Lot Number | Address Line 1 | Address Line 2 | City | State | ZIP |
| 2 | Scout@Avenas@gmail.com | Carmela | Figgins | Figgins 1 | | 3 | 4896 Elm Street | | San Antonio Texas | | 78261 |
| 3 | clockheran@gmail.com | Angelique | Fernandez | Fernandez 1 | | 12 | 1058 Flowing Springs | | San Antonio Texas | | 78261 |
| 4 | stylis1980@yahoo.com | Sanda | Deeks | Deeks 1 | | 57 | 1659 Wicklow Lane | | San Antonio Texas | | 78261 |
| 5 | towercahildres@yahoo.com | Mina | Tiras | Tiras 1 | | 42 | 25739 Wicklow Path | | San Antonio Texas | | 78261 |
| 6 | jgwentworth@yahoo.com | Jaime | Johnson | Johnson 1 | Renters | 33 | 1460 Wicklow Lane | | San Antonio Texas | | 78261 |
| 7 | mentacho@gmail.com | Francis | Johnson | Johnson 1 | Renters | 33 | 1460 Wicklow Lane | | San Antonio Texas | | 78261 |
| 8 | youknowmeme@grm.com | Heaton | Barret | Barret 1 | | 29 | 6739 Elm Street | | San Antonio Texas | | 78261 |
| 9 | g.wilcox@wilcoxexpresscleaners.com | Gary | Wilcox | Wilcox 1 | | 54 | 1459 Wicklow Lane | | San Antonio Texas | | 78261 |
| 10 | brekkefordinne@hotmail.com | Holly | Wilcox | Wilcox 1 | | 54 | 1459 Wicklow Lane | | San Antonio Texas | | 78261 |
| 11 | m.guarino@texas-university.edu | Meegan | Guarino | Guarino 1 | | 87 | 64846 Goode St. | | San Antonio Texas | | 78261 |

One of five Access Types (Owner, Renter, Property Manager, Contractor, Other) can be included in the CSV but is not required. If the Access Type column is left blank, Household will automatically be assigned as an "Owner", which by default allows both voting and dues privileges. Both "Lot Number" and "Address Line 2" are optional fields. ZIP column does not accept ZIP+4 codes. Use only the first five digits of ZIP code.

Once you have reviewed your CSV file for consistency, ensuring you have included all the required fields, you are ready to import. Return to the Households page. Click on "+Import Household." Click the "Upload file" icon, and open your household CSV file.



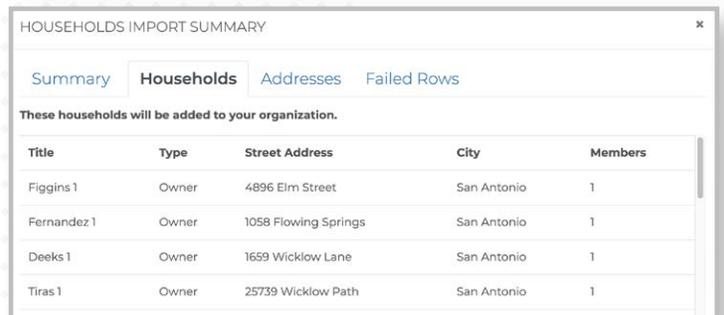
Click on the "Review Import" button to bring up the Households Import Summary window. From this window, you will see a summary of any new household-specific addresses and households. Tabs will appear across the top if new information needs to be reviewed.



Households tab displays Household Title, Access Type, Street Address, City and number of Members being added to the organization.

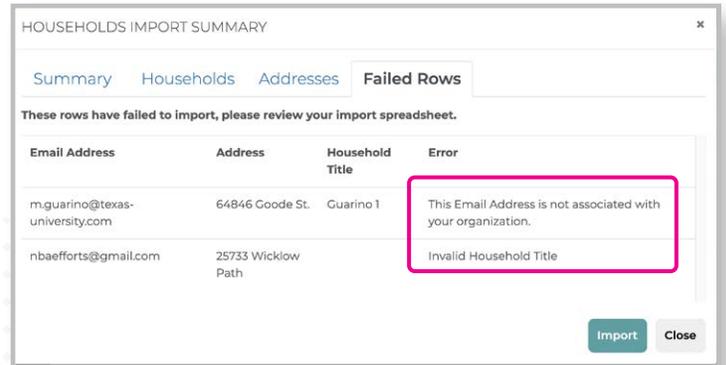
Addresses tab displays a list of Street Address, Lot #, City, State, and ZIP codes that are being added to the organization.

Updated Households tab displays any new members that were added to an existing Household.



HOUSEHOLDS: IMPORTING EXISTING MEMBERS - CONTINUED

Failed Rows tab highlights any information that was incorrect in the CSV file and will not be included in your import. If any fail errors are indicated, it's best to "Close" out the window and make necessary revisions in the CSV before importing your file.



If no errors are found and you are satisfied with your review summary, click "Import."

- ◆ **Note that both new Households and Addresses can be created in the system without assigned members. Member data does not need to be included in a Household Import. Members can be added later manually using the edit tools.**

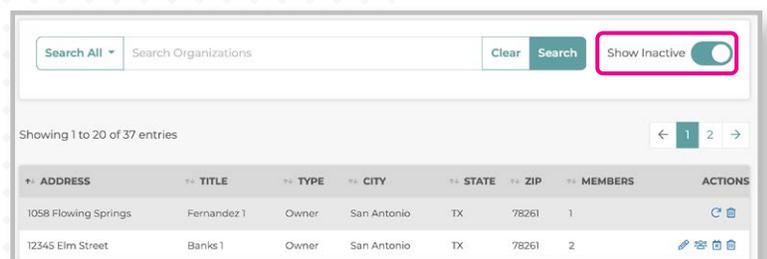
From the Households page, you can now see all the current Households and associated addresses. You can take several actions from this screen. At the end of each row you can Edit, View Members, Deactivate, and Delete households.

| ADDRESS | TITLE | TYPE | CITY | STATE | ZIP | MEMBERS | ACTIONS |
|----------------------|-------------|--------|-------------|-------|-------|---------|---|
| 1058 Flowing Springs | Fernandez 1 | Owner | San Antonio | TX | 78261 | 1 |     |
| 12345 Elm Street | Banks 1 | Owner | San Antonio | TX | 78261 | 2 |     |
| 12548 Bending Creek | Coreleone1 | Owner | San Antonio | TX | 78261 | 1 |     |
| 12550 Bending Creek | Ryliann 1 | Renter | San Antonio | TX | 78261 | 1 |     |
| 12552 Bending Creek | Fossums 1 | Owner | San Antonio | TX | 78261 | 2 |     |
| 12553 Bending Creek | Astaire 1 | Renter | San Antonio | TX | 78261 | 1 |     |
| 12554 Bending Creek | Stones 1 | Owner | San Antonio | TX | 78261 | 1 |     |

Edit icon - This opens a window in which you can modify Household Title, Access Type, and add or remove Members. Click on the "View Summary" button to review any changes you may have made before you save them.

View Members icon - This opens a window in which you can see a list of members in an individual household.

Deactivate icon - This allows you to deactivate the household. To reactivate, slide the "Show Inactive" toggle switch in the upper right corner of the page. Current deactivated household rows will be highlighted in gray. Click the circular Reactivate arrow icon.



Delete icon - This allows you to delete a household completely.

HOUSEHOLDS: IMPORTING EXISTING MEMBERS - CONTINUED

Individual Households can be added from the Household page. Click on the “+New Household” button. The Add New Household window allows you to add a Household Title, apply an Access Type, pick from existing or add a new Address, and add Household Members from your available membership. Click on the “View Summary” button to review your changes before you save them.

From the Addresses page, you can now see all the current addresses available to use with Households. You can take the same types of actions here as on the Households screen. At the end of each row you can Edit, View Households, Deactivate, and Delete an address. Click on the “+ New Address” button to add additional household addresses.

◆ **You cannot delete an address once household data – such as dues and votes – attaches to it.**

| ADDRESS | LOT NUMBER | CITY | STATE | ZIP | HOUSEHOLDS | ACTIONS |
|----------------------|------------|-------------|-------|-------|------------|--|
| 1058 Flowing Springs | 12 | San Antonio | TX | 78261 | 1 | [Edit] [View Households] [Deactivate] [Delete] |
| 12345 Elm Street | 11 | San Antonio | TX | 78261 | 1 | [Edit] [View Households] [Deactivate] [Delete] |
| 12548 Bending Creek | 28 | San Antonio | TX | 78261 | 1 | [Edit] [View Households] [Deactivate] [Delete] |

From the Household Imports page, Admins can see a list of previous CSV imports. Click on the numbers under the New Addresses, New Households, New Members, and Failed Rows columns to review the associated information with that import. If some portion of your data failed import, you can download a CSV file that lists the failed rows with error message details.

| IMPORT DATE | FILE NAME | NEW ADDRESSES | NEW HOUSEHOLDS | NEW MEMBERS | FAILED ROWS | DOWNLOAD ERRORS |
|----------------------------|--------------------------------------|---------------|----------------|-------------|-------------|-----------------|
| 11:10AM on October 21 2021 | Household-Import-HouseholdVillas.csv | 37 | 37 | 43 | 0 | |

If you have any further questions about the Household features, please visit support.hoastart.com, where you can open a support ticket.