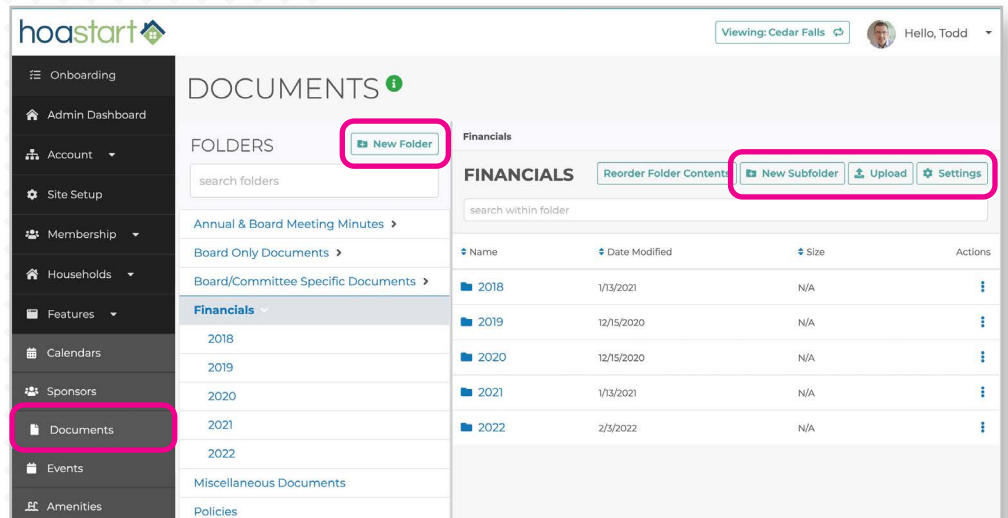


SET UP A DOCUMENT REPOSITORY

Track your community's history and affairs through documents including rules and regulations, finances, photos, and more. Organize sets of documents into folders that share common attributes so administrators and members can retrieve them whenever they need them. To make these documents available to your members, and in some cases restrict who can see them, use your website to provide downloadable access.

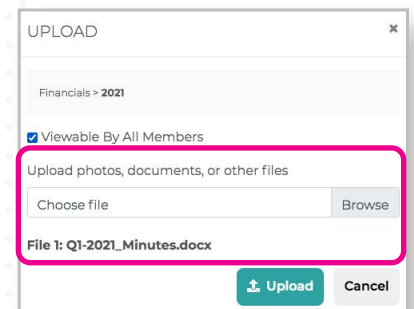
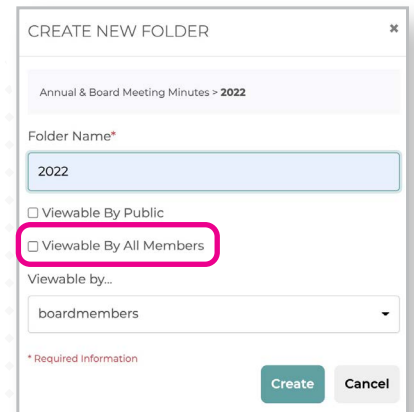
To get started, click on the “Documents” tab listed under Features in the Admin Panel. Next, click on the “New Folder” button which will open the “Create New Folder” window. Name the folder according to what you plan to store in it and click the “Create” button. Once you create a folder, click on the “New Subfolder button” to add subfolder(s) within the original parent folder.



By default, all members of your community can view folders and subfolders access. Admins can choose whether to make the contents of a folder accessible to everyone in the community, restrict it to people within a specific committee or use other manually assigned tags to determine file visibility. With a specific folder highlighted, click on the “Settings” button in the upper right corner of the Documents window to open the “Edit Folder” window. Uncheck the “Viewable By All Members” checkbox and select the appropriate tags to restrict viewing options. If you need to modify the name of the folder, change it in the Edit Folder window.

- ◆ **To restrict access to the Documents page itself on the public website, from non-members on the Public website, they turn on “Hide If Not Logged In” under page settings.**

To add a document to your folder, click on the “Upload” button. From the “Upload” window, click on the “Browse” button to select your file. Once you locate the file you want, click on the “Upload” button to finish the process. To upload multiple files at once into a folder, hold down the **Command** key (Mac), or **Control** key (PC), and click on your chosen files. As with folders and subfolders, Admins can assign tags within this same window to restrict access to specific files.



SET UP A DOCUMENT REPOSITORY - CONTINUED

To give community members to access to documents, your website will need to include a Documents feature template page. For more information about adding a new template page to your site, visit the [Help Desk](#) on that topic for a more in-depth view.

You can to download files to your desktop or smart device in two different ways. For individual files, simply click on the file name or the Download icon in the Actions column. To download multiple files from one folder at once, use the Bulk Download option. Click on the “Bulk Download” button, select the specific files you would like to download, and click on the Download button. Ten or more downloaded file(s) are compressed into a .zip file.

Cedar Falls
San Antonio, TX

(123) 456-7890 | admin@cedarfalls-community.com

Home Calendar Newsfeed Documents About Members Contact Us

Documents

Secure document repository
We've unified our document resources here in a one-stop location for official information, organized in handy category folders. Check back frequently for new additions to our archives.

Folders

search folders

Annual & Board Meeting Minutes ▾

2019

2020

2021

Board Only Documents >

Board/Committee Specific Documents >

Financials >

Miscellaneous Documents

Policies

Annual & Board Meeting Minutes > 2020

Subfolders and Files

search within folder

Bulk Download

Name	Date Modified	Size	Actions
July 2020 Board Meeting Minutes.docx	12/15/2020	21.3 KB	
January 2020 Board Meeting Minutes.docx	12/15/2020	21.3 KB	
February 2020 Board Meeting Minutes.docx	12/15/2020	21.3 KB	
Special Assessment Meeting July 2020.docx	1/12/2021	21.4 KB	
April 2020 Board Meeting Minutes.docx	12/15/2020	21.3 KB	
November 2020 Special Board Meeting Minutes.docx	12/15/2020	21.3 KB	

Bulk Download

Select

All

Name	Date Modified	Type	Size
<input type="checkbox"/> April 2020 Board Meeting Minutes.docx	12/15/2020	application/vnd.openxmlformats	21.3 KB
<input type="checkbox"/> February 2020 Board Meeting Minutes.docx	12/15/2020	application/vnd.openxmlformats	21.3 KB
<input checked="" type="checkbox"/> January 2020 Board Meeting Minutes.docx	12/15/2020	application/vnd.openxmlformats	21.3 KB
<input checked="" type="checkbox"/> July 2020 Board Meeting Minutes.docx	12/15/2020	application/vnd.openxmlformats	21.3 KB
<input checked="" type="checkbox"/> November 2020 Special Board Meeting Minutes.docx	12/15/2020	application/vnd.openxmlformats	21.3 KB
<input type="checkbox"/> Special Assessment Meeting July 2020.docx	1/12/2021	application/vnd.openxmlformats	21.4 KB

Download 4 Files Cancel



If you have additional questions about using the Documents feature, please open a Support Desk ticket through your Admin Dashboard.