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HOW TO USE THE MOBILE APP

IMPORTANT NOTES

This streamlined Member experience is available for Apple and Android devices on the Apple App Store and Google Play Store. Its button-centric design makes Member-oriented features easy to view and use.

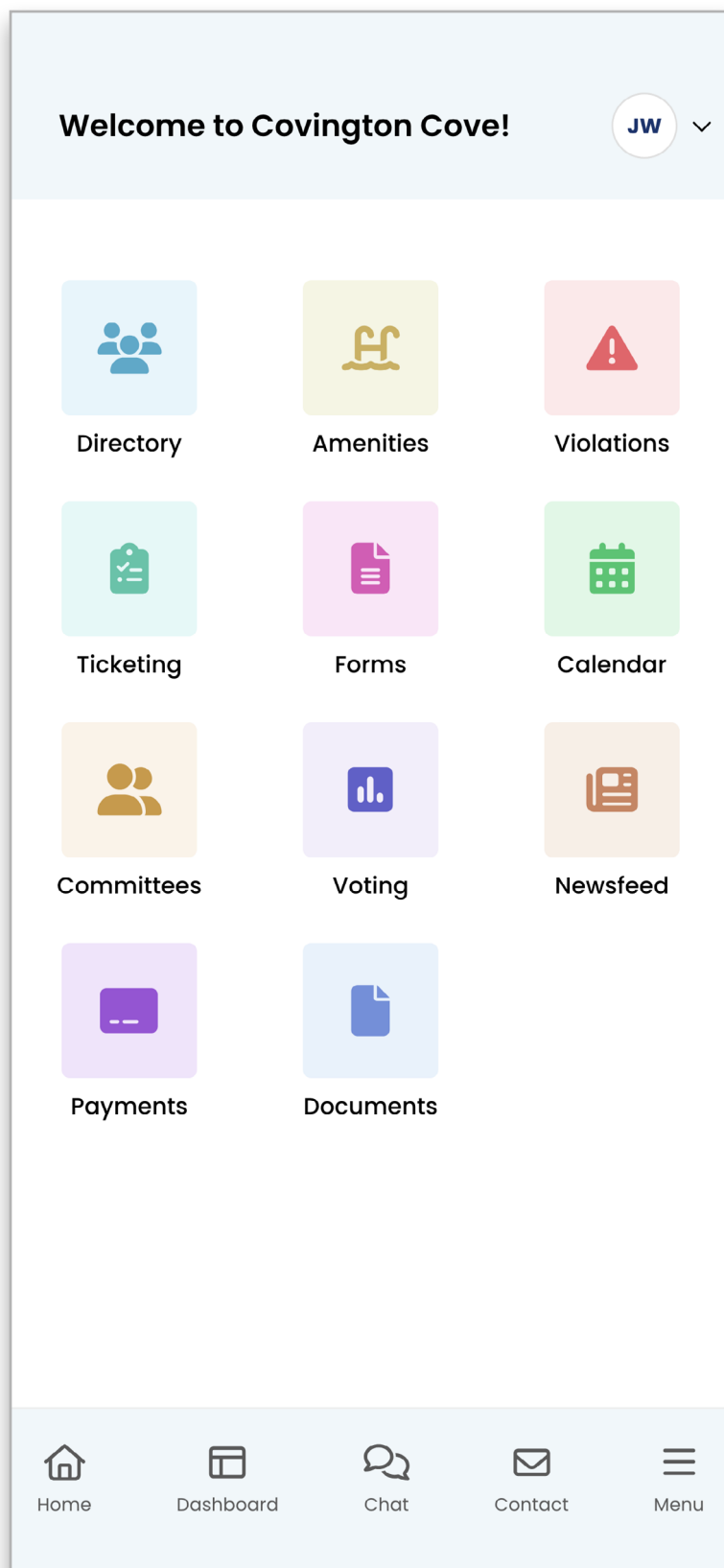
You cannot sign up for Membership directly on the app itself. If you do not yet have an active website Membership, you will need to sign up on your community website before you can log in to the app.

Once you are ready to use the app, sign in with your e-mail address and password.

These are the same credentials you use to log in to your community website.

The app is not designed as a replacement for the Admin Dashboard. To administer your community, please use a web browser to log in to your public site and access the Admin Dashboard.

This document walks you through the various screens of the mobile app one by one. Some of the screens and features you see in this guide may look different, or may not be available, for your community. The discussions in this document represent the default configuration of the app for a community on the Premium Plan Package, but some features are not available on the Professional Plan Package. Additionally, your community Admins can hide or rename some features. Watch for this symbol ★ to indicate notes that differentiate various setup possibilities for the mobile app.



MOBILE APP: THE HOME SCREEN

This screen uses a set of colorful buttons to reach features that correspond to those on your public website and/or your Member Portal. Tap a button to reach the corresponding feature.

Depending on your community's connectivity plan and settings, you may not see all of these buttons. They may appear in a different order or with different names. Features marked with a ★ are Premium Plan Package features.

Directory: The Member Directory for your organization. You choose whether to appear in the Directory and, if so, how much personal information to share there. See page 8 of this guide for information about these settings.

★ **Amenities:** Review community features you can reserve, and place your reservations.

★ **Violations:** Submit violations; review violations that are assigned to you, and respond to any that require action.

★ **Ticketing:** Submit tickets; review your current ticket submissions, and respond to any new administrative input on them.

Forms: Vote, answer questions, and submit information through custom formst.

Calendar: Learn more about and register for upcoming community events, and sign up for those that require registration.

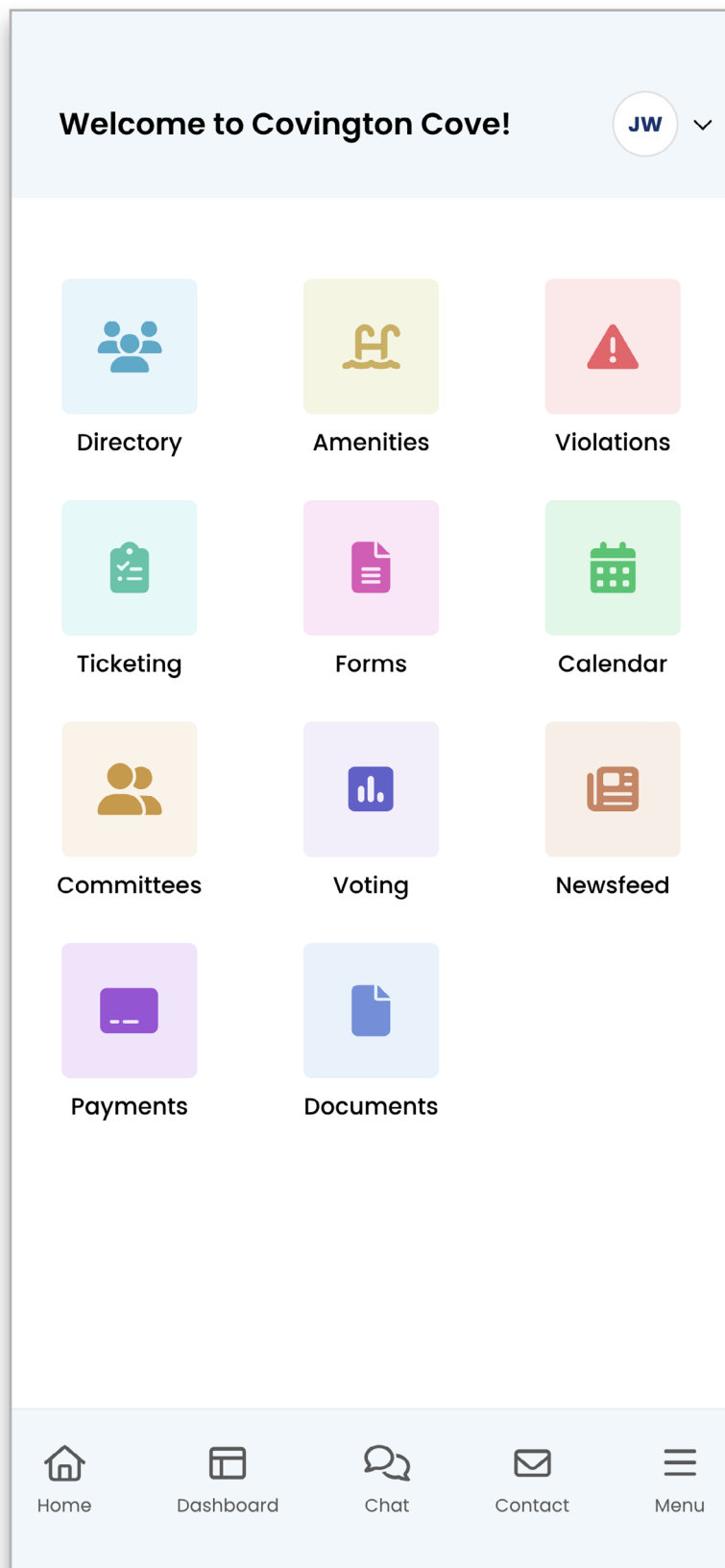
★ **Committees:** Join committees or apply for membership; review committee assignments.

Voting: Vote on current surveys and polls.

Newsfeed: Read and respond to current posts and replies.

Payments: Review and pay currently due/late payments.

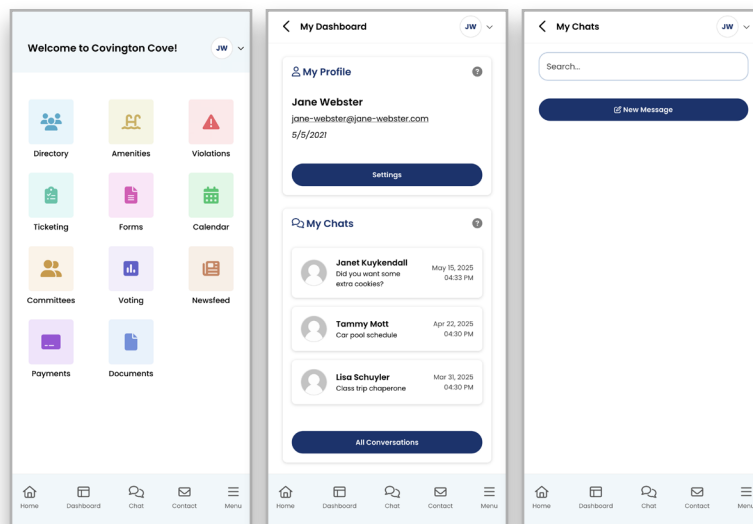
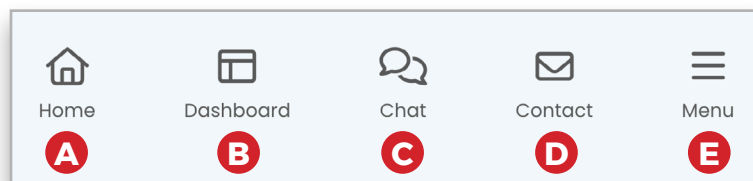
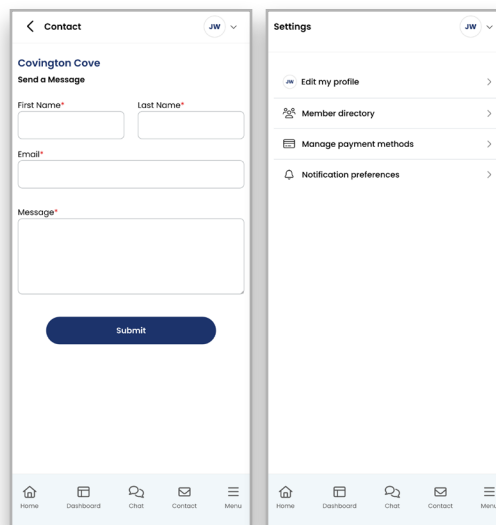
Documents: Review and download files from your community.



MOBILE APP: THE BOTTOM MENU BAR

At the bottom of the screen on every window in the mobile app, you'll find icons that lead to other features and functions.

- A** Tap on the **"Home"** icon to return to the Home page of the app.
- B** Tap on the **"Dashboard"** icon to reach "My Dashboard." The "My Dashboard" window provides the same information and features as the "Hello, [Your Name]" menu's "My Dashboard" item on your website or the Member Portal's "Dashboard" icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features. See page 12 of this document for a discussion of the items on the "My Dashboard" window.
- C** Tap on the **"Chat"** icon to reach "My Chats." The "My Chats" window provides the same information and features as the chat icon at the right end of the menu bar on your website. Note that you will not see this item if your community has disabled the Private Messaging feature or you have not enabled Chat for yourself. (See page 7 of this document for instructions on how to enable this setting.)
- D** Tap on the **"Contact"** icon to reach "Contact." The "Contact" window enables you to send a message to your community administrators. Some administrators may disable this feature and use a custom form instead.
- E** Tap on the **"Menu"** icon to reach the "Options Menu." See page 5 of this document for a discussion of the items on the "Options Menu" window.

**A****B****C****D****E**

MOBILE APP: THE OPTIONS MENU

To reach this window—

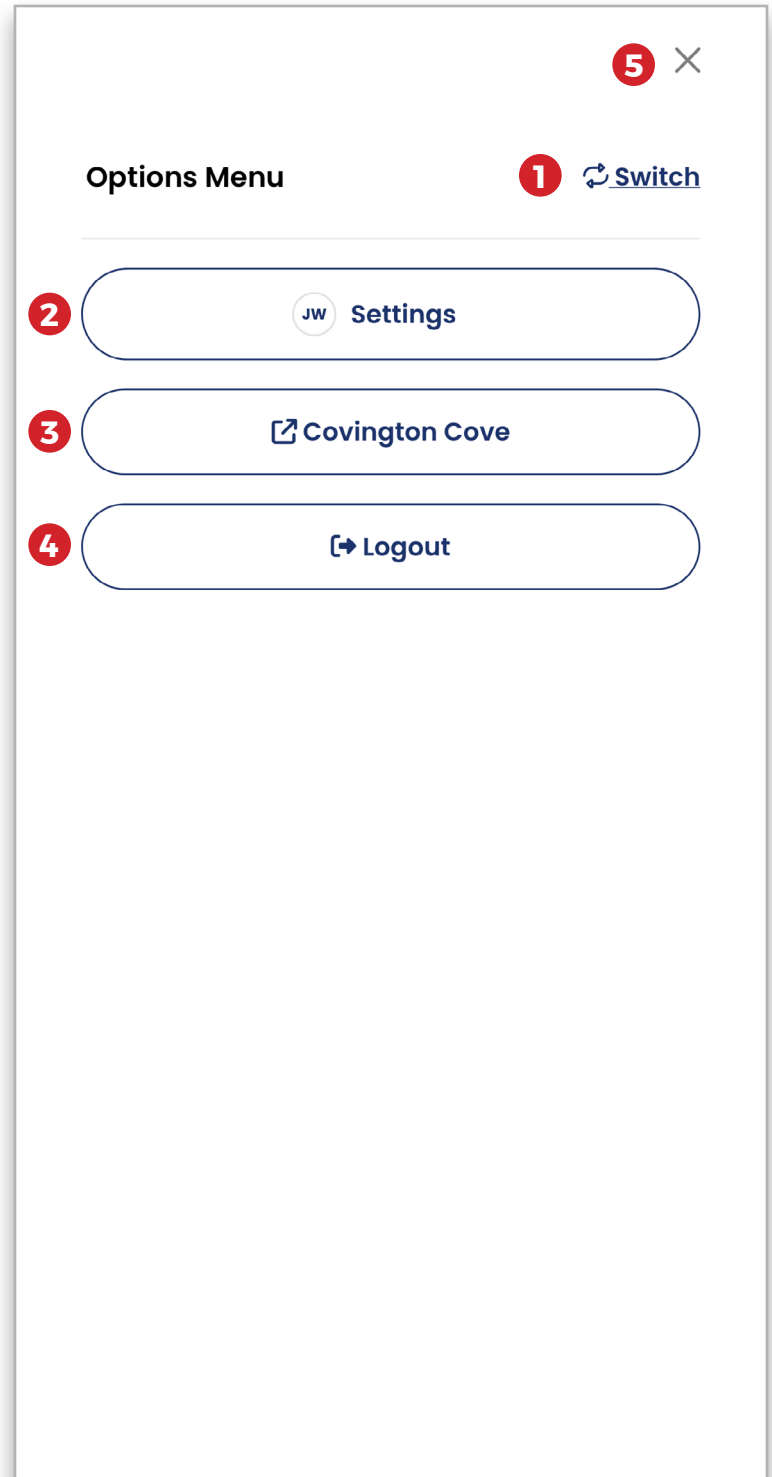
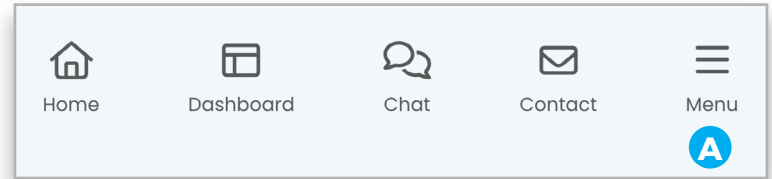
From the bottom menu bar: **A** Tap on the bottom menu bar's "Menu" icon to open the "Options Menu" window.

NOTE: Depending on your community's connectivity plan and your individual Member status, you may not see all of these items.

Note also that you may hear this icon referred to as a "hamburger menu." That's because its icon looks like a stylized hamburger as seen from the side: Dashes above and below for the bun, and a dash in the middle for the burger.

Where the "Options Menu" links lead—

- 1** The "**Switch**" link: If you have access to more than one community website, tap this link to access the "Switch Site" window, which provides a list of the sites you can access.
- 2** The "**Settings**" button: Access the "Settings" window to establish or change settings for your member account.
- 3** The "**[Your Community Name]**" button: View your community's website. When you tap this button, your preferred mobile web browser launches and brings up your community site in a browser window. Note that if you want to access Members-only features of your website, you will need to log in to the website when the window opens in your mobile browser..
- 4** The "**Logout**" button: Log out of the app. (Once you close the "Options menu" window, you also can log out from the "[Your Initials]" dropdown menu at the top right of the window.)
- 5** To close the "**Options Menu**" window, tap on the "**X**" at the top right corner of the window.



MOBILE APP SETTINGS

This window contains links to four functional areas of the app.

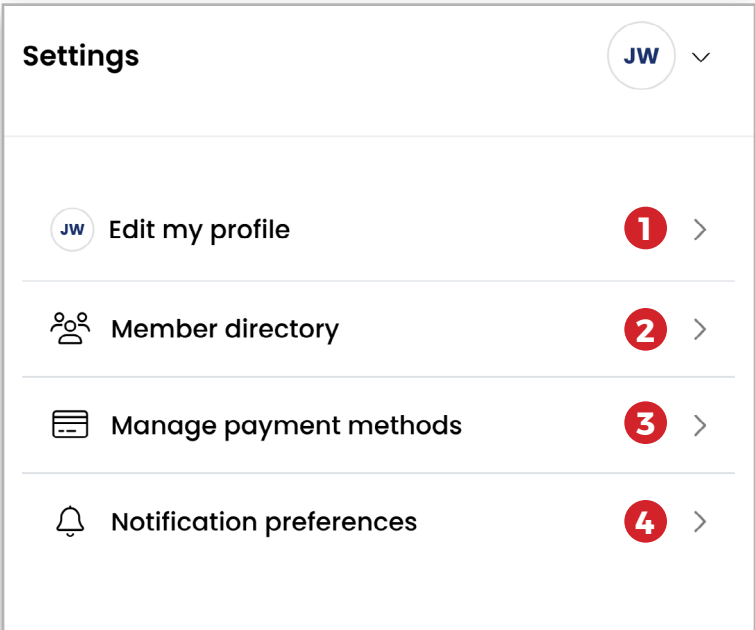
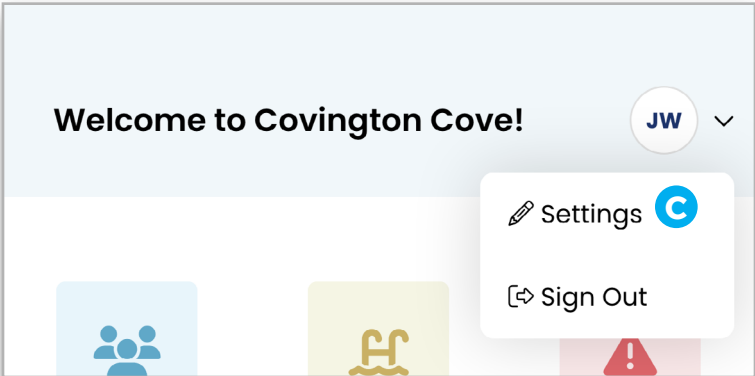
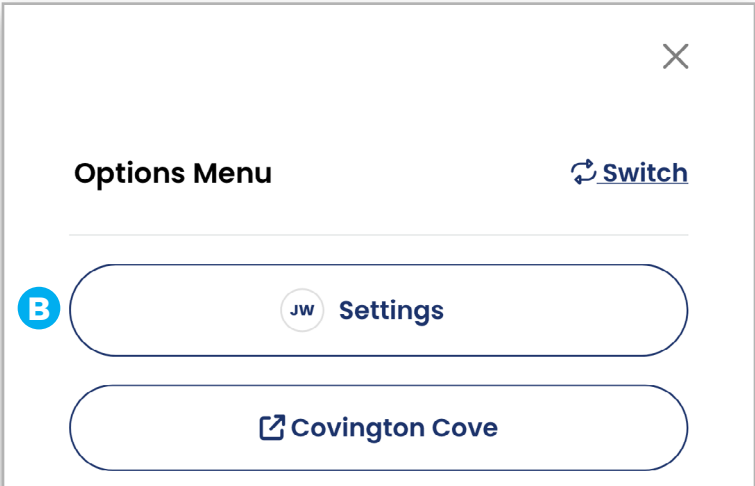
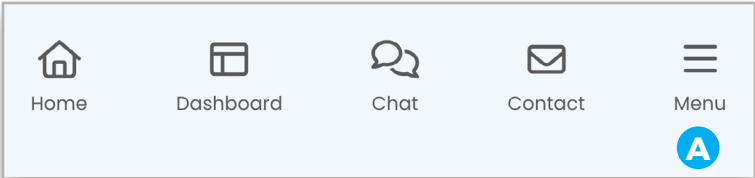
To reach this window—

From the bottom menu bar: **A** Tap on the bottom menu bar’s “Menu” icon to open the “Options Menu” window. **B** Tap on the “Settings” button.

From the “[Your Initials]” menu on the “Home” screen: **C** Tap on “Settings” to open the “Settings” window.

Where the “Settings” links lead—

- 1** The “**Edit my profile**” link leads to the “My Profile” window. Change your member settings there.
- 2** The “**Member directory**” link leads to the “Directory Preferences” window. Opt in or out of sharing your personal information in the Member Directory, and choose what information you do share.
- 3** The “**Manage payment methods**” link leads to the “Saved Payment Methods” window. Add, edit, or remove credit/debit card and ACH payment account information to make payments for invoices, One-Time Charges, and other features.
- 4** The “**Notification preferences**” link leads to the “Notifications” window. Enable Chat if your community uses Private Messaging and you want to want to communicate directly with other members. Opt to receive text messages from your community. Opt in or out of receiving notifications of specific types of new community features and events. Note that to receive in-app push notifications from your community, you must enable Notifications in the settings for your mobile device itself.



MOBILE APP SETTINGS: “MY PROFILE”

On the “Settings” screen, **1** the “Edit my profile” link leads to the “My Profile” window, shown here.

“Profile photo”

Add a photo or other image file as an avatar. It will appear on your Profile and on your entry in the Member Directory, if you choose to share your personal information there. **A** Tap on the “Upload picture” link and choose to add or take a photo. Upload a GIF, JPG, or PNG file less than 15 MB in size. The options available will depend on whether your phone uses iOS or Android and which version of the operating system you use.

B The “My information” section of the profile records basic information about you.

Add your name, e-mail address, telephone number, and physical address. If you want to receive text messages from your community, be sure to enter a cell phone number, not a landline number.

“Additional information” (not shown)

Community administrators may add custom fields to request more information from you. Some of these fields may be required. If you are asked to fill in these details, scroll down below the “My information” section to respond with this additional information.

C If you make changes to this information, remember to tap on the “Save” button at the top right, next to the “[Your Initials]” menu. If you do not save your changes, they will not be preserved.

D To reach the rest of your settings, tap on the “<” icon to the left of the title of the “My Profile” window. This takes you back to the “Settings” window.

My Profile **C** Save **JW** ▾

Profile photo

 **A** Upload picture

My information **B**

First Name* Last Name*

Email*

Phone

Country* ▾

Lot #

Address 1* ▾

Address 2

Home Dashboard Chat Contact Menu

MOBILE APP SETTINGS: “DIRECTORY PREFERENCES”

On the “Settings” screen, **2** the “**Member directory**” link leads to the “Directory Preferences” window, shown here.

Some people want to share their contact information with their neighbors. Others prefer to limit the amount of information they share, even on a private Member Directory. Regardless of where you fit on that continuum, here’s how to set up your preferences for the inclusion—or exclusion—of your data in the Member Directory.

A Activate the “**Appear in member directory**” checkbox to include yourself in the directory. By itself, this setting only shares your name and avatar/photo.

B Activate each or any of the “**Address**,” “**Email address**,” and “**Phone**” checkboxes to share one or more of these additional items.

Your community administrators may have created fields to gather additional categories of personal information. If they have made it possible to share any of these items in the Member Directory, the “Member Directory” option selection list will include these items, each with a checkbox you can activate to share that specific category of information.

C If you make changes to this information, remember to tap on the “**Save**” button at the top right, next to the “[Your Initials]” menu. If you do not save your changes, they will not be preserved.

D To reach the rest of your settings, tap on the “<” icon to the left of the title of the “My Profile” window. This takes you back to the “Settings” window.

The screenshot displays the "Directory Preferences" screen in a mobile app. At the top, there's a header bar containing a back arrow icon labeled 'D', the title "Directory Preferences", a "Save" button labeled 'C', and a user profile icon with initials "JW". Below the header, the main content area features a checkbox labeled "Appear in member directory" with a blue circle 'A' next to it. Underneath this, there are three more checkboxes: "Address" (with a blue circle 'B' next to it), "Email Address", and "Phone". At the bottom of the screen is a navigation bar with five icons: a house for "Home", a folder for "Dashboard", two speech bubbles for "Chat", an envelope for "Contact", and a hamburger menu for "Menu".

MOBILE APP SETTINGS: “SAVED PAYMENT METHODS”

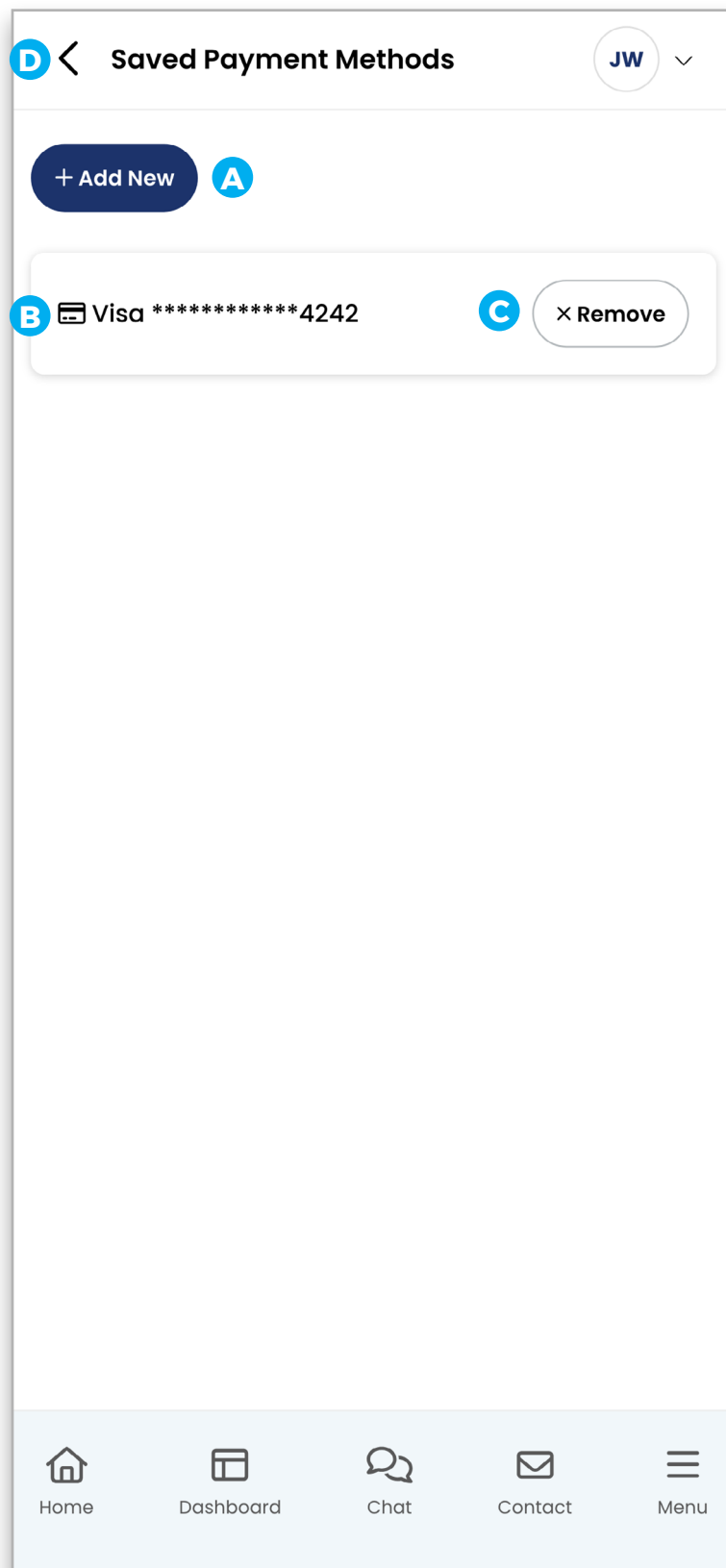
On the “Settings” screen, **3** the “**Manage payment methods**” link leads to the “Saved Payment Methods” window, shown here.

A Tap on the “**+Add New**” button to add a payment account. You can add more than one.

B The account-display area shows any accounts you’ve already added.

C Tap on the “**Remove**” button to remove an account you’ve already added.

D To reach the rest of your settings, tap on the “<” icon to the left to the title of the “My Profile” window. This takes you back to the “Settings” window.



MOBILE APP SETTINGS: “NOTIFICATIONS”

On the “Settings” screen, **4** the “**Notification preferences**” link leads to the “Notifications” window, shown here.

A Activate the “**Enable Chat**” checkbox to participate in online chat. If you do not activate this checkbox, no one will be able to send you chat messages, and you will be unable to send them yourself. Note that if your community does not use the Private Messaging feature, you will not see this checkbox.

B Activate the “**Receive Text Messages**” checkbox to receive group text messages from your community. NOTE: You must enter a cell phone number on “My Profile” to receive community text messages. If the number you enter on “My Profile” is not a cell phone number, you will not receive group text messages from your community, even if you activate the “Receive Text Messages” checkbox.

C Activate the “**Receive Weekly/Monthly Digest Notifications**” checkbox to opt in to and select specific items for e-mailed notification updates about your community. Note that depending on the connectivity package to which your community subscribes and the way it is set up, you may see fewer of these options than are shown here.

Once you activate the “Receive Weekly/Monthly Digest Notifications” checkbox, set the “Choose Digest Notification Frequency” radio buttons to “Weekly Updates” or “Monthly Updates,” depending on your preferences.

In the “Choose which Digest Notifications to receive” section, activate the checkbox in front of each item about which you want to receive updates.

The discussion of “**Notifications**” settings continues on the following page of this document. →

Notifications Save JW

A ☒ **Enable Chat** ?

B ☒ **Receive Text Messages** ?

C ☒ **Receive Weekly/Monthly Digest Notifications** ?

Choose Digest Notification Frequency: ?

☒ Weekly Updates

☐ Monthly Updates

Choose which Digest Notifications to receive:

☒ Payment Reminders

☒ Ticketing Updates

☒ New Document Uploads

☒ Violation Updates

☒ Calendar Entry Updates

☒ Association Registration Notifications

Home Dashboard Chat Contact Menu

MOBILE APP SETTINGS: “NOTIFICATIONS,” CONTINUED

On the “Settings” screen, **4** the “**Notification preferences**” link leads to the “Notifications” window, shown here. (This discussion continues from the preceding page of this document. The view you see here shows this window after you have scrolled it to reach its final section. **←**)

D Activate the “**Receive In-App Push Notifications**” toggle switch to receive notifications on your mobile device each time select events occur. In the “Choose which Push Notifications to receive” section, activate the checkbox in front of each item about which you want to receive push notifications. Note that depending on the connectivity package to which your community subscribes and the way it is set up, you may see fewer of these options than are shown here. Note also that to receive in-app push notifications from your community, you must enable Notifications in the settings for your mobile device itself.

E If you make changes to this information, remember to tap on the “**Save**” button at the top right, next to the “[Your Initials]” menu. If you do not save your changes, they will not be preserved.

F To reach the rest of your settings, tap on the “<” icon to the left of the title of the “My Profile” window. This takes you back to the “Settings” window.

F < **Notifications** **E** **Save** JW ▾

☒ New Event Listings

D ☒ **Receive In-App Push Notifications** ?

Choose which Push Notifications to receive: ?

☒ Invoices

☒ Ticketing Notifications

☒ New Document Uploads

☒ Violation Notifications

☒ Calendar Entry Notifications

☒ Amenity Registration Reminders

☒ Newsfeed Notifications

☒ Private Chat Notifications

☒ Survey Notifications

☒ Committee Notifications

Home Dashboard Chat Contact Menu

MOBILE APP: “MY DASHBOARD”

The “**My Dashboard**” window provides the same information and features as the “Hello, [Your Name]” menu’s “My Dashboard” item on your website or the Member Portal’s “Dashboard” icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features.

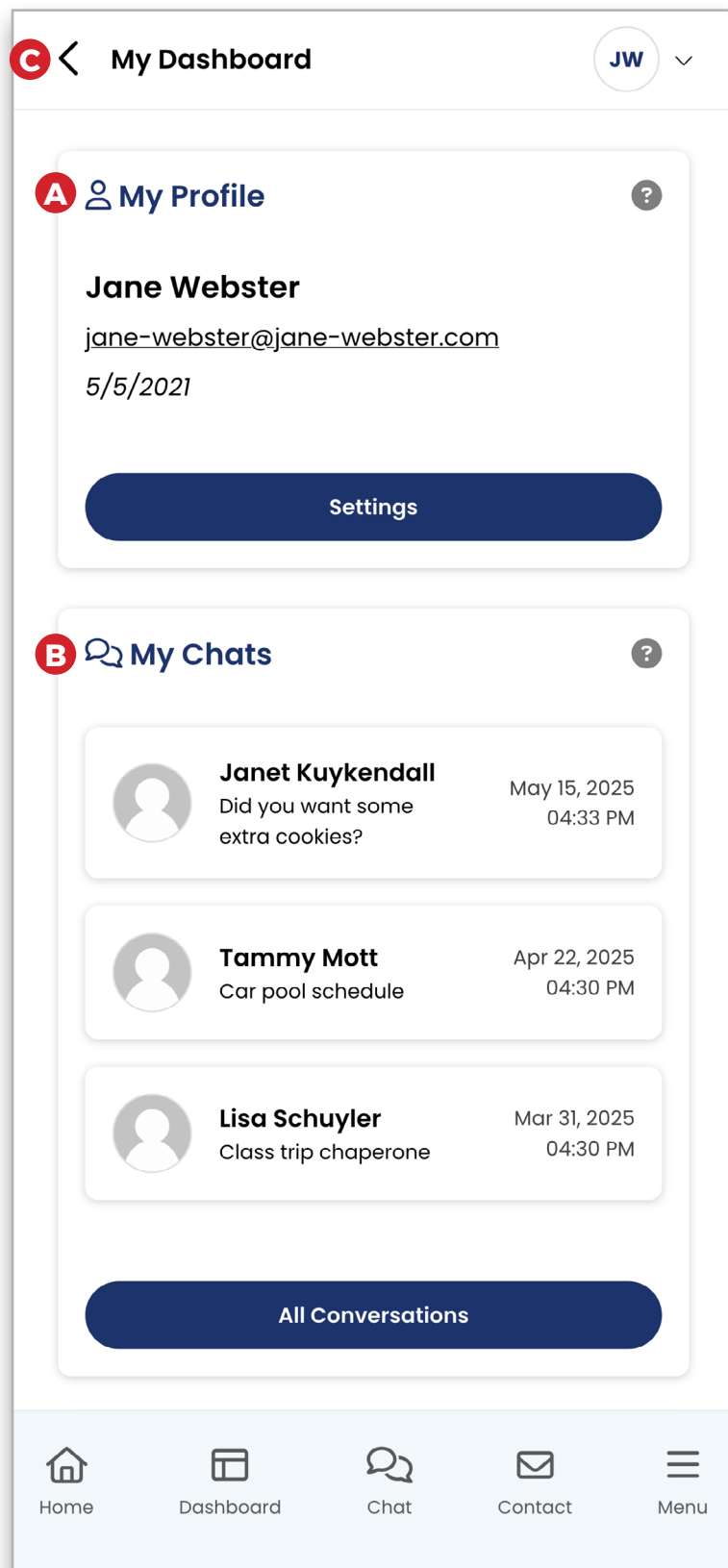
NOTE: Depending on your community’s connectivity plan and settings, you may not see all of the following cards. They may appear in a different order than listed below, or with names that differ from these defaults.

A “**My Profile**” with “Settings” button: Shows profile highlights, and leads to the same content as the corresponding card on the public website’s “My Dashboard” window, and—here on the app—from the “Settings” window’s “Edit my profile” link.

B “**My Chats**” with “All Conversations” button: Features current chat replies, and leads to the same content as the corresponding card on the public website’s “My Dashboard” window and the chat icon on the public website’s menu bar.

C To reach the rest of your settings, tap on the “<” icon to the left of the title of the “My Profile” window. This takes you back to the “Settings” window.

The discussion of “**My Dashboard**” continues on the following page of this document. →



MOBILE APP: “MY DASHBOARD”—CONTINUED

The “**My Dashboard**” window provides the same information and features as the “Hello, [Your Name]” menu’s “My Dashboard” item on your website or the Member Portal’s “Dashboard” icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features.

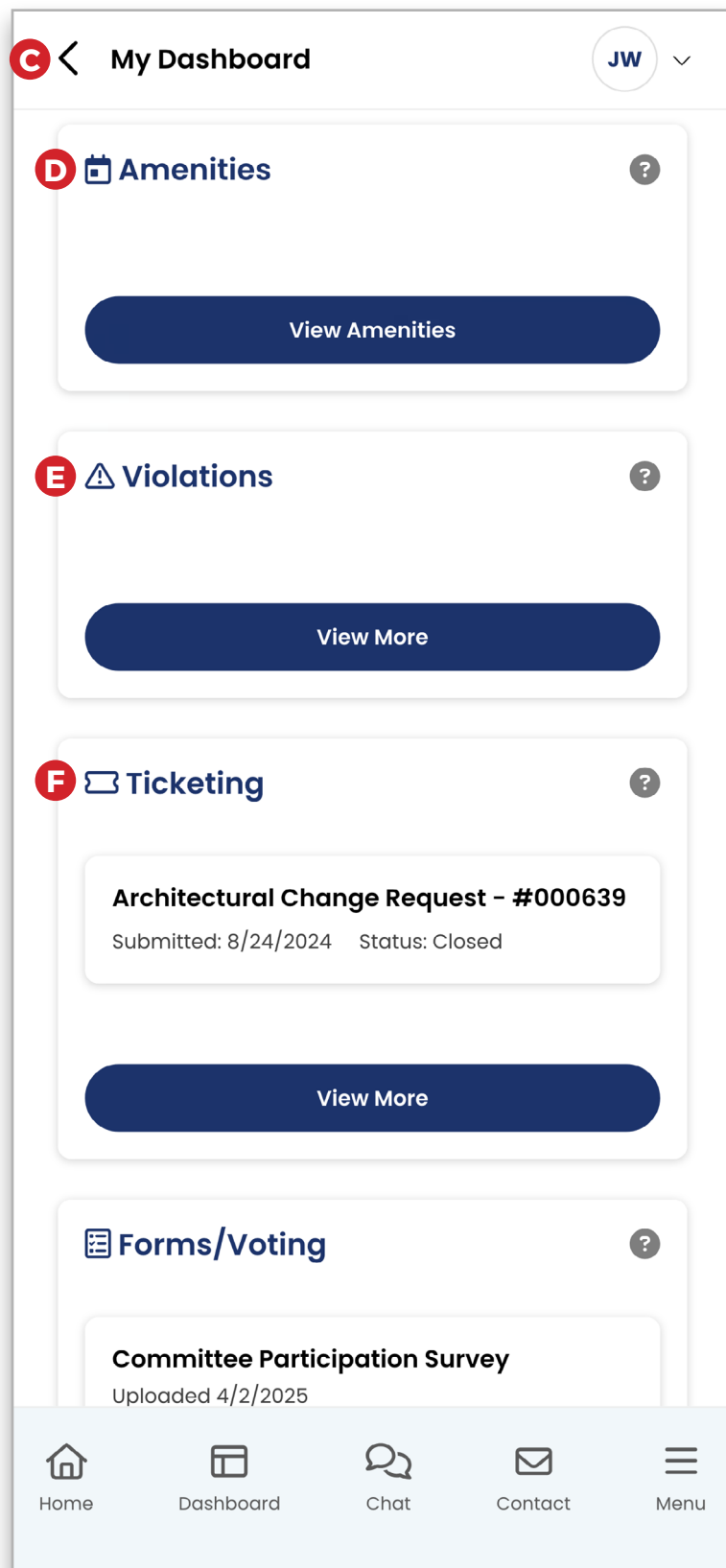
NOTE: Depending on your community’s connectivity plan and settings, you may not see all of the following cards. They may appear in a different order than listed below, or with names that differ from these defaults.

D “**Amenities**” with “View Amenities” button: Shows upcoming reservations, and leads to the same window as the “My Reservations” card on the public website.

E “**Violations**” with “View More” button: Shows current violations that are assigned to you, and leads to the same content as the corresponding card on the public website’s “My Dashboard” window.

F “**Ticketing**” with “View More” button: Shows current ticket submissions, and leads to the same content as the “Tickets” card on the public website’s “My Dashboard” window.

The discussion of “**My Dashboard**” continues on the following page of this document. ➔



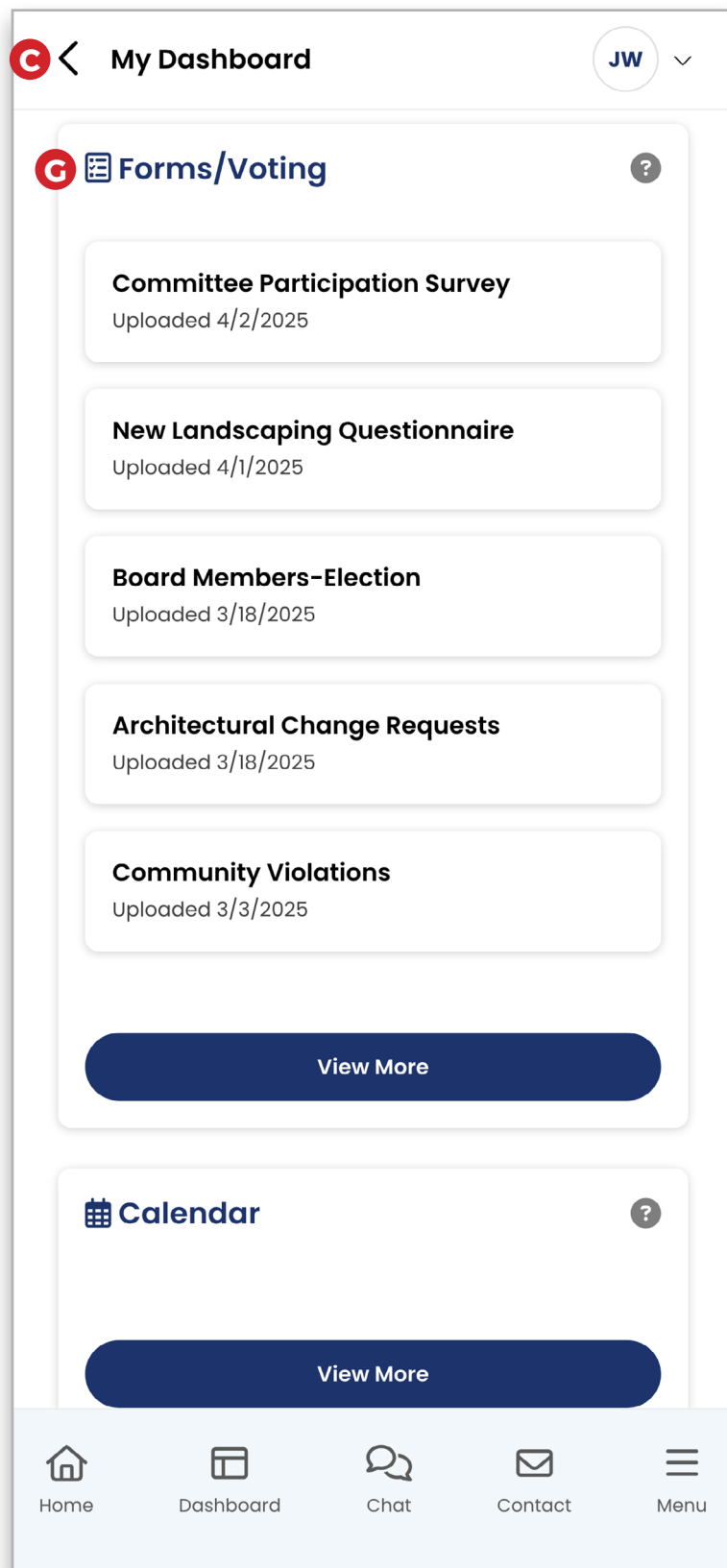
MOBILE APP: “MY DASHBOARD”—CONTINUED

The “**My Dashboard**” window provides the same information and features as the “Hello, [Your Name]” menu’s “My Dashboard” item on your website or the Member Portal’s “Dashboard” icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features.

NOTE: Depending on your community’s connectivity plan and settings, you may not see all of the following cards. They may appear in a different order than listed below, or with names that differ from these defaults.

 **“Forms/Voting”** with “View More” button: Provides access to current surveys and votes, and leads to the same content as the corresponding card on the public website’s “My Dashboard” window.

The discussion of “**My Dashboard**” continues on the following page of this document. →



MOBILE APP: “MY DASHBOARD”—CONTINUED

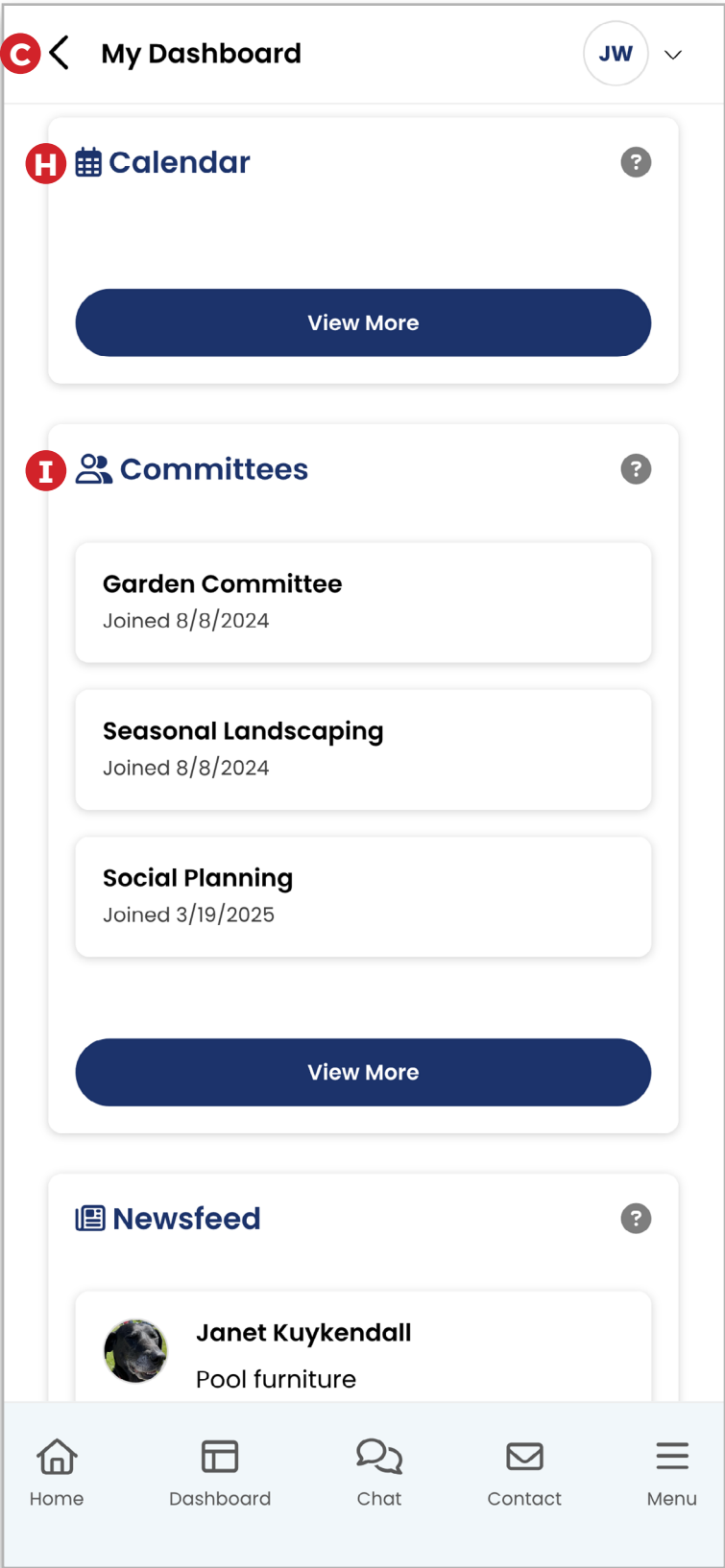
The “**My Dashboard**” window provides the same information and features as the “Hello, [Your Name]” menu’s “My Dashboard” item on your website or the Member Portal’s “Dashboard” icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features.

NOTE: Depending on your community’s connectivity plan and settings, you may not see all of the following cards. They may appear in a different order than listed below, or with names that differ from these defaults.

H “Calendar” with “View More” button: Shows upcoming community events for which you can register, and leads to the same content as the “Events” card on the public website’s “My Dashboard” window.

I “Committees” with “View More” button: Shows your committee assignments, and leads to the same content as the “My Committees” card on the public website’s “My Dashboard” window.

The discussion of “**My Dashboard**” continues on the following page of this document. ➔



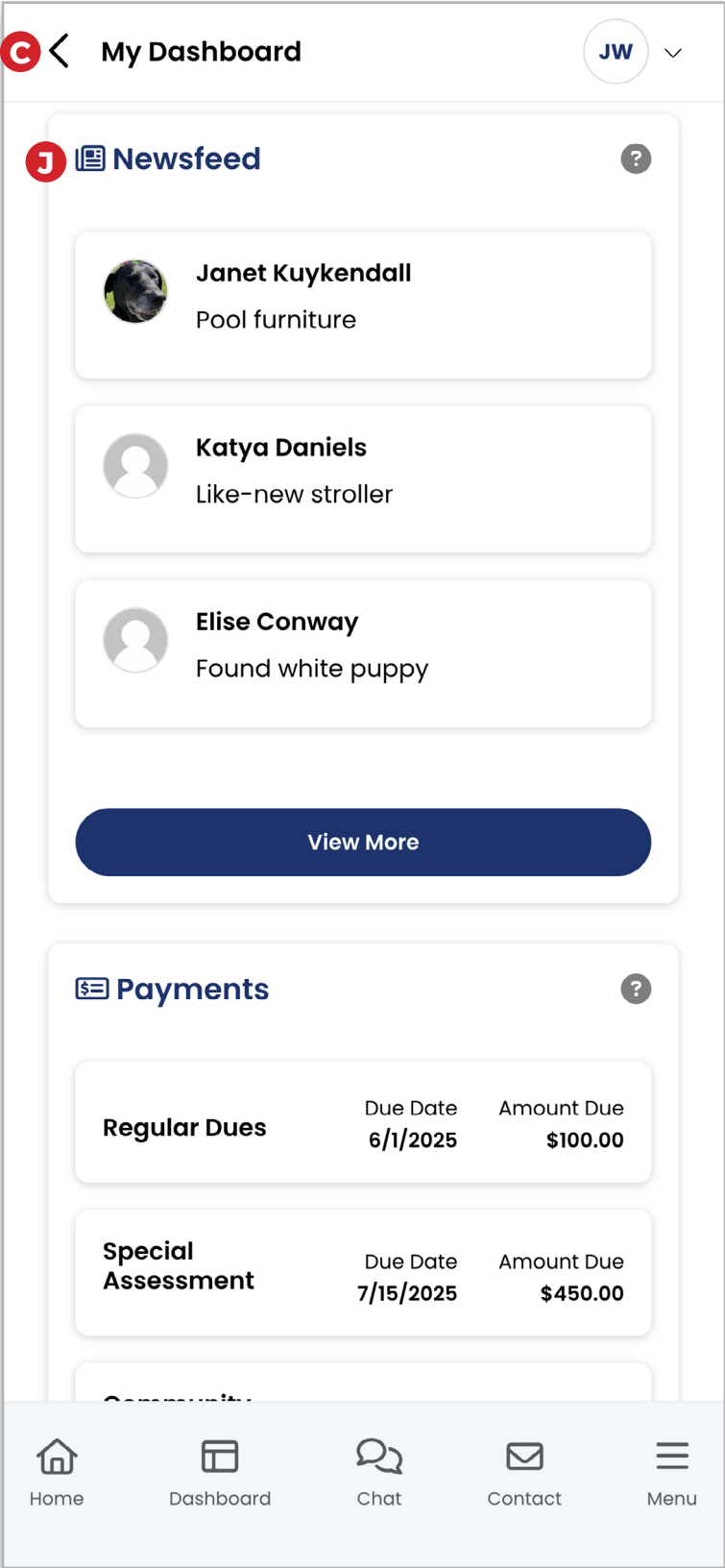
MOBILE APP: “MY DASHBOARD”—CONTINUED

The “**My Dashboard**” window provides the same information and features as the “Hello, [Your Name]” menu’s “My Dashboard” item on your website or the Member Portal’s “Dashboard” icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features.

NOTE: Depending on your community’s connectivity plan and settings, you may not see all of the following cards. They may appear in a different order than listed below, or with names that differ from these defaults.

J “**Newsfeed**” with “View More” button:
Features current posts and replies, and leads to the same content as the corresponding card on the public website’s “My Dashboard” window.

The discussion of “**My Dashboard**” continues on the following page of this document. ➔



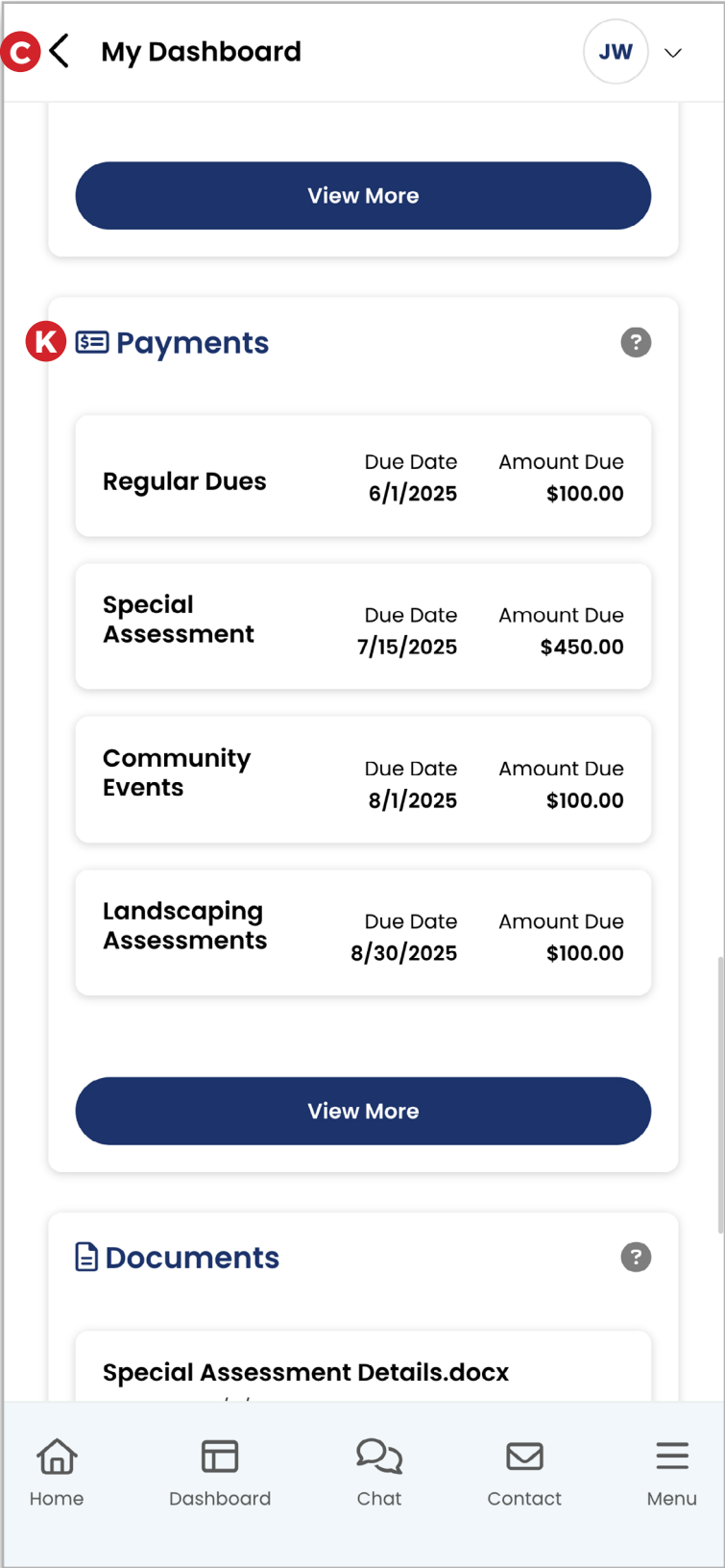
MOBILE APP: “MY DASHBOARD”—CONTINUED

The “**My Dashboard**” window provides the same information and features as the “Hello, [Your Name]” menu’s “My Dashboard” item on your website or the Member Portal’s “Dashboard” icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features.

NOTE: Depending on your community’s connectivity plan and settings, you may not see all of the following cards. They may appear in a different order than listed below, or with names that differ from these defaults.

K “**Payments**” with “View More” button: Shows currently due/late payments, and leads to the same content as the “My Payments” card on the public website’s “My Dashboard” window.

The discussion of “**My Dashboard**” continues on the following page of this document. ➔



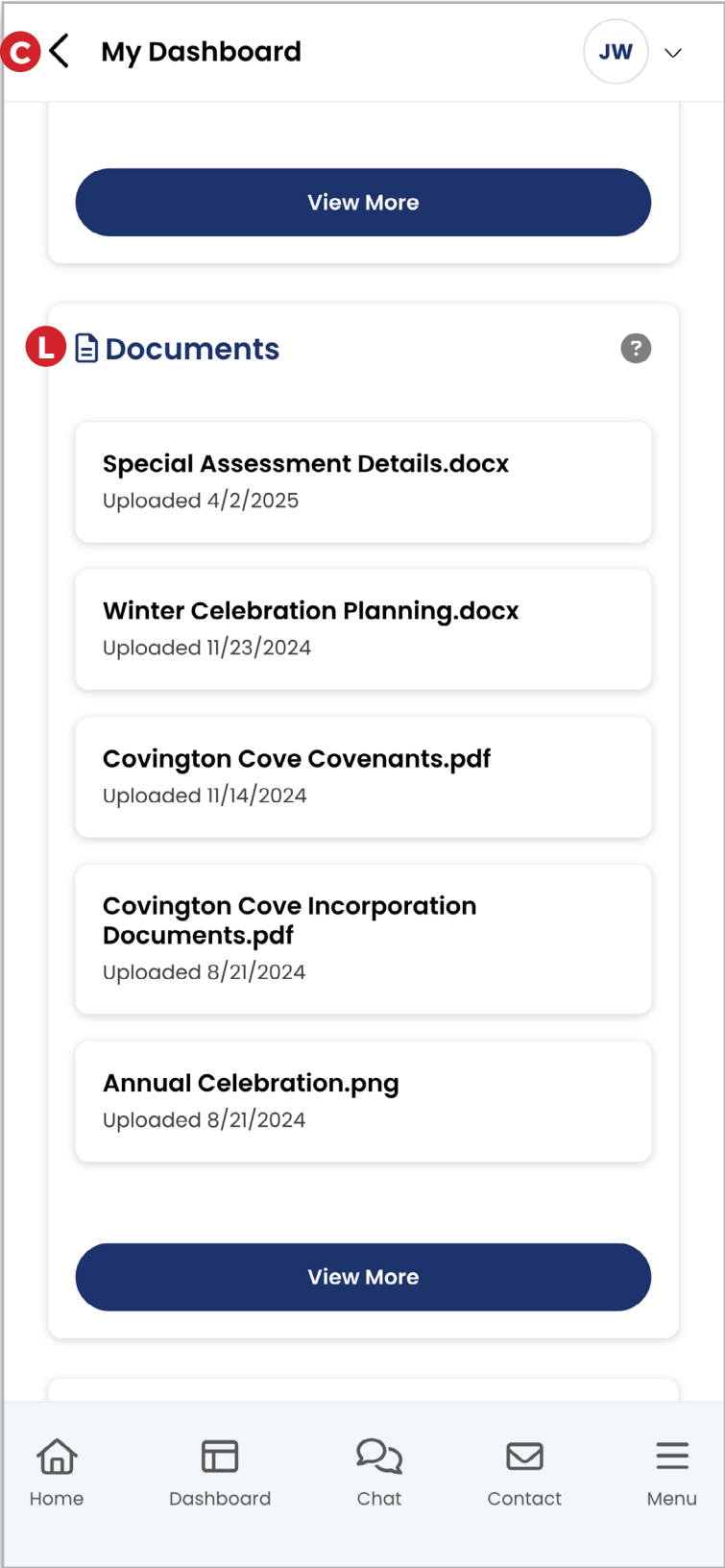
MOBILE APP: “MY DASHBOARD”—CONTINUED

The “**My Dashboard**” window provides the same information and features as the “Hello, [Your Name]” menu’s “My Dashboard” item on your website or the Member Portal’s “Dashboard” icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features.

NOTE: Depending on your community’s connectivity plan and settings, you may not see all of the following cards. They may appear in a different order than listed below, or with names that differ from these defaults.

L “Documents” with “View More” button: Shows recent file uploads, and leads to the same content as the “My Documents” card on the public website’s “My Dashboard” window.

The discussion of “**My Dashboard**” continues on the following page of this document. ➔



MOBILE APP: “MY DASHBOARD”—CONTINUED

The “**My Dashboard**” window provides the same information and features as the “Hello, [Your Name]” menu’s “My Dashboard” item on your website or the Member Portal’s “Dashboard” icon in its menu bar. The Dashboard incorporates individual cards that provide information about specific features.

NOTE: Depending on your community’s connectivity plan and settings, you may not see all of the following cards. They may appear in a different order than listed below, or with names that differ from these defaults.

M “Sponsors”: Lists community sponsors, and leads to the same content as the corresponding card on the public website’s “My Dashboard” window.

