

MEMBER REPORT OVERVIEW



Member Profile Report
Date: 1/30/2026



Jane Webster
Admin

Contact
8620 Covington Lane
Emerald, Massachusetts 02135
jane-webster@jane-webster.com
617-454-8026

Assigned Tags
tennis text *hoa board *event planning
*hoa board *architectural committee phase1

System
Status: Active
Last Login: 1/30/2026

Custom Fields
Year-Round Resident: Yes

Admin-Only Fields

Households
Webster01

Member Dues

Due	Sent to User	Invoice #	Name	Amount
3/4/2026	1/3/2026	#003442	Annual dues	\$1,250.00
6/10/2026	1/9/2026	#003659	Pool access	\$35.00
Member Balance				\$1,285.00

Webster01 Dues & Fees

Due	Sent to User	Invoice #	Name	Amount
5/22/2026	1/21/2026	#003720	Special assessment (Phase 1)	\$750.00
Webster01 Balance				\$750.00

Payment History

Date	Due Type	Due Name	Due Amnt Paid	Service Fee	Misc Fee	Pmt Type
3/6/2025	Member	Annual dues	\$1,250.00	\$45.65	\$0.00	\$1,250.00 Visa *****4854
3/6/2024	Member	Annual dues	\$1,200.00	\$43.83	\$0.00	\$1,200.00 Visa *****4854
1/12/2025	Member	Pool access	\$35.00	\$1.58	\$0.00	\$35.00 Visa *****4854
1/11/2024	Member	Pool access	\$32.50	\$1.49	\$0.00	\$32.50 Visa *****4854

Member Wallet Transaction History

Wallet Balance: **\$100.00**

Date	Amount	Notes
10/10/2025	\$50.00	Credit for landscaping donation
11/29/2025	\$50.00	Credit for landscaping donation

When you want to review all aspects of an individual Member’s invoicing and payment history, along with their Member and Household Wallet activity, Ticketing System tickets,

violations, and non-anonymous survey/poll votes, the Member Report organizes all the information you need in a conveniently downloadable PDF file.

MEMBER REPORT: OVERVIEW (Continued)

Webster01 Household Wallet Transaction History

Webster01 Household Wallet Balance: \$75.00

Date	Amount	Notes
12/15/2025	\$50.00	Credit for food truck donation
11/14/2025	\$25.00	Credit for food truck donation

Submitted Tickets

Date	Title	Status
10/23/2025	Architectural Change Request	Requesting Info
9/8/2025	Architectural Change Request	Accepted
8/12/2025	Architectural Change Request	Pending Review
7/14/2025	Architectural Change Request	Rejected

Violations

Date	Title	Status
12/22/2026	Covington Cove Violation Form	Closed

Voting/Survey History

Landscaping Survey

Date: 10/17/2025

Do you want to be involved in seasonal planting in 2026?

Yes

Neighborhood Watch

Date: 09/14/2025

Are you interested in serving on neighborhood watch?

No

Food truck program

Date: 08/15/2025

Would you support a seasonal food-truck program?

Yes, would contribute

Note that some of the features shown here (e.g., Ticketing System tickets, violations) are not available in all Plan Packages, so your community may not have opted for access to these features.

The Member Report only displays information about features that your community uses and for which the specific Member has reportable activity.

MEMBER REPORT: OVERVIEW (Continued)

Onboarding

Admin Dashboard

Account

Manage Site

Membership

Members

Member Form

Member Approval

Committees

Boardroom

Sub-Admin Roles

Households

Features

Forms

Payments

Financials

Message Center

My Sites

Support

MEMBERS

23 Members

Members Actions

Search All

Search Members

Clear

Search

*Search categories marked with an asterisk support multi-word search text.

Show InactiveFilter To Never Logged In

Showing 1 to 20 of 23 entries (filtered from 90 total entries)

MEMBER	PHONE	WALLET BALANCE	ST	ROLE	LAST LOGIN	ACTIVE	ACTIONS
Corey Bradford coreyb@cbradfordllc.com	413-371-8261	\$0.00	MA	Member	2/9/2026	Active	
Jaime Coronado coronado@Coronaldotconsulting.com	413-663-2385	\$0.00	MA	Member	2/9/2026	Active	
Max Delroy delroy@delroyengineering.com	413-998-8989	\$0.00	MA	Member	2/9/2026	Active	
Carole Dwiggins carole.dwiggins@dwigginsfurniture.com	413-998-1603	\$0.00	MA	Member	2/9/2026	Active	
William Feldner bill.feldner@feldnerassociates.com	413-545-5413	\$0.00	MA	Member	1/23/2026	Active	
Mary Fischer mary.fischer@fischerbenefits.com	413-545-4802	\$0.00	MA	Member	1/23/2026	Active	
Della Granby della.granby@granbyhardware.com	413-594-1881	\$0.00	MA	Member	1/21/2026	Active	
Jarrod Hammill jarrod.hammill@hammillbuilders.com	413-594-6208	\$0.00	MA	Member	1/8/2026	Active	
Jarrod Hammill jarrod.hammill@hammillbuilders.com	413-594-6208	\$0.00	MA	Member	11/1/2025	Active	
Lisa Hathaway lisa@hathawayanalysis.com	413-594-0989	\$0.00	NY	Member +	9/12/2025	Active	
Steve Kelby steve.kelby@kelbyinsurance.com	413-545-9919	\$0.00	MA	Member	8/4/2025	Active	
Carla Knight cknight@cknightadvertising.com	413-238-4218	\$0.00	MA	Member	6/4/2025	Active	
Janet Kuykendall janet@thekuykendalls.com	413-594-7605	\$0.00	MA	Member +	5/9/2025	Active	
Gregg Martins gregg.martins@gmartinsrealty.com	413-232-6937	\$0.00	MA	Member	5/13/2025	Active	
Sarah Peters sarahp@paulson-peters.com	413-594-1513	\$0.00	MA	Member	5/12/2025	Active	
Jerome Sherrod jsherrod@jsherrodplumbing.com	413-238-0142	\$0.00	MA	Admin	5/9/2025	Active	
Mari Skantham mari@skanthaminc.com	413-594-2281	\$0.00	MA	Member	4/30/2025	Active	
Alissa Stanford astanford@alissastanfordllc.com	413-371-2614	\$0.00	MA	Admin	1/23/2025	Active	
Jane Webster jane-webster@jane-webster.com		\$0.00	MA	Admin			
Jay Wells jay@jwcarpentryco.com	413-232-2463	\$0.00	MA	Member			

Showing 1 to 20 of 22 entries (filtered from 24 total entries)

Download Member Report

View Member

Manage Wallet

Add Invoice

Deactivate Member

To generate a Member Report for an individual community Member, click on the “Membership” tab of the Admin Dashboard menu and then on the “Members” tab.

Locate the Member for whom you want to create a report. On a long Member list, use the search capabilities at the top of the window.

In the “Actions” column, click on the three-dots menu in the listing for the Member you chose, and select “Download Member Report.”

The following pages itemize the anatomy of a Member Report and explain the individual items included in it.

MEMBER REPORT: ANATOMY OF THE REPORT

Member Profile Report
Date: 1/30/2026

Jane Webster
Admin

Contact
8620 Covington Lane
Emerald, Massachusetts 02135
jane-webster@jane-webster.com
617-454-8026

Assigned Tags
tennis text hoa board event planning
hoa board architectural committee phase1

System
Status: Active
Last Login: 1/30/2026

Custom Fields
Year-Round Resident: Yes

Admin-Only Fields

Households
Webster01

Member Dues

Due	Sent to User	Invoice #	Name	Amount
3/4/2026	1/3/2026	#003442	Annual dues	\$1,250.00
6/10/2026	1/9/2026	#003659	Pool access	\$35.00
Member Balance				\$1,285.00

Webster01 Dues & Fees

Due	Sent to User	Invoice #	Name	Amount
5/22/2026	1/21/2026	#003720	Special assessment (Phase 1)	\$750.00
Webster01 Balance				\$750.00

Payment History

Date	Due Type	Due Name	Due Amnt	Service Paid	Misc Fee	Pmt Type
3/6/2025	Member	Annual dues	\$1,250.00	\$45.65	\$0.00	\$1,250.00 Visa *****4854
3/6/2024	Member	Annual dues	\$1,200.00	\$43.83	\$0.00	\$1,200.00 Visa *****4854
1/12/2025	Member	Pool access	\$35.00	\$1.58	\$0.00	\$35.00 Visa *****4854
1/11/2024	Member	Pool access	\$32.50	\$1.49	\$0.00	\$32.50 Visa *****4854

Member Wallet Transaction History

Date	Amount	Notes
10/10/2025	\$50.00	Credit for landscaping donation
11/29/2025	\$50.00	Credit for landscaping donation

Wallet Balance: **\$100.00**

Webster01 Household Wallet Transaction History

Date	Amount	Notes
12/15/2025	\$50.00	Credit for food truck donation
11/14/2025	\$25.00	Credit for food truck donation

Webster01 Household Wallet Balance: **\$75.00**

Submitted Tickets

Date	Title	Status
10/23/2025	Architectural Change Request	Requesting Info
9/8/2025	Architectural Change Request	Accepted
8/12/2025	Architectural Change Request	Pending Review
7/14/2025	Architectural Change Request	Rejected

Violations

Date	Title	Status
12/22/2026	Covington Cove Violation Form	Closed

Voting/Survey History

Landscaping Survey
Date: 10/17/2025

Do you want to be involved in seasonal planting in 2026?
Yes

Neighborhood Watch
Date: 09/14/2025

Are you interested in serving on neighborhood watch?
No

Food truck program
Date: 08/15/2025

Would you support a seasonal food-truck program?
Yes, would contribute

This sample Member Report includes features that are not part of the Professional Plan Package (i.e.,

P Ticketing System tickets and **Q** violations). Additionally, this sample report shows features that all Plan Packages include but that some communities may opt not to use.

C Date on which the report was generated.

D Avatar, name, and status of the Member.

E Contact information.

F Tags applied to the Member's account.

G Member status (active or inactive); date on which the Member last logged in.

H Data entered into custom fields on the Member Form.

I Data entered into Admin-Only fields on the Member Form.

J Household Titles of Households of which the Member is a Household Member.

K Outstanding Member dues.

L Outstanding Household dues; additional sections appear for any additional Households.

M Payments.

N Member Wallet transactions.

O Household Wallet transactions; additional sections appear for any additional Households.

P Ticketing System ticket submissions/status.

Q Violation status.

R Votes cast on non-anonymous community surveys/polls.

MEMBER REPORT: ANATOMY OF THE REPORT (Continued)

Details

- C** Date on which the report was generated.
- D** Avatar (initials if no avatar has been added), name, and status of the Member.
- E** Contact information. This information can include an additional optional line in the street address. The telephone number also is optional.
- F** Member tags limit access to website pages/features, and determine who receives Member dues invoices. Tags that begin with an asterisk denote committee membership.
- G** Member status (active or inactive); date on which the Member last logged in. An inactive Member never has created a password and has not logged in to their online account.
- H** Data entered into custom fields on the Member Form, either by the Member or by an Admin on their behalf. Entries are accessible to the Member on their Member Profile. Custom fields can be set up so the Member can opt in to share custom-field data in the Member Directory.
- I** Data entered into Admin-Only fields on the Member Form. Only Admins can see and enter information into these fields. Entries in these fields are not visible to the Member and cannot be shared in the Member Directory.
- J** Household Titles of each of the Member's Households. A Member who owns multiple lots may be part of multiple Households.
- K** Outstanding Member dues. Paid invoices are not shown. Includes the due date, date on which the invoice was sent, invoice number, name of the dues item that generated the invoice, and amount due.
- L** Outstanding Household dues; additional sections for any additional Households. Paid invoices are not shown. Includes the due date, date on which the invoice was sent, invoice

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D **Jane Webster**
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*hoa board *architectural committee *phase1

G System
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H Custom Fields
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J Households
Webster01

K Member Dues

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M Payment History

Date	Due Type	Due Name	Due Amnt Paid	Service Fee	Misc Fee	Prnt Type
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1/11/2024	Member	Pool access	\$32.50	\$1.49	\$0.00	\$32.50 Visa *****4854

N Member Wallet Transaction History

Date	Amount	Notes
10/10/2025	\$50.00	Credit for landscaping donation
11/29/2025	\$50.00	Credit for landscaping donation

Wallet Balance: **\$100.00**

number, name of the dues item that generated the invoice, and amount due.

M Payments for invoices from Member or Household dues items, one-off invoices from Member or Household Wallets, One-Time Charges, amenity reservations, and event registrations. Shows the date of each payment, the type of item paid, the name of the item, the amount paid, the amount of any service and/or miscellaneous transaction fees paid by the Member, and confirmation of the face value paid and the payment source (i.e., debit or credit card, ACH account, or Wallet balance funds).

N Member Wallet transactions. Negative amounts (shown in parentheses) are one-off invoices. Positive amounts are additions to Wallet balance funds. Includes the date, amount, and notes added to each transaction.

MEMBER REPORT: ANATOMY OF THE REPORT (Continued)

Details

O Household Wallet transactions; additional sections appear for any additional Households. Negative amounts (shown in parentheses) represent one-off invoices. Positive amounts are additions to Wallet balance funds. Includes the date, amount, and notes added to each transaction.

P Ticketing System ticket submissions/status. Note that this is a Premium/White Glove Plan Package feature. Includes the date of each ticket submission, the title of the Ticketing System form to which the ticket was submitted, and the status of the ticket submission (i.e., “Pending Review,” “Approved,” or “Rejected”).

Q Violation status. Note that this is a Premium/White Glove Plan Package feature. Includes the date of each violation report submitted about the Member and/or their property address(es), the title of the violation form to which the violation was submitted, and the status of the violation report (i.e., “Disputed,” “In Progress,” “In Violation,” “Pending,” “Closed,” “Completed,” “Dismissed,” or “Resolved”).

R Votes cast on non-anonymous community surveys/polls. Includes the name of the survey/poll form to which the vote was submitted, the date of the submission, the questions asked on the form, and the Member’s responses to those questions. Because of the nature and intent of anonymous voting, surveys/polls that are designated as anonymous cannot be analyzed here without violating Member privacy, so these surveys/polls are excluded.

O

Webster01 Household Wallet Transaction History
Webster01 Household Wallet Balance: \$75.00

Date	Amount	Notes
12/15/2025	\$50.00	Credit for food truck donation
11/14/2025	\$25.00	Credit for food truck donation

P

Submitted Tickets

Date	Title	Status
10/23/2025	Architectural Change Request	Requesting Info
9/8/2025	Architectural Change Request	Accepted
8/12/2025	Architectural Change Request	Pending Review
7/14/2025	Architectural Change Request	Rejected

Q

Violations

Date	Title	Status
12/22/2026	Covington Cove Violation Form	Closed

R

Voting/Survey History

Landscaping Survey
Date: 10/17/2025

Do you want to be involved in seasonal planting in 2026?
Yes

Neighborhood Watch
Date: 09/14/2025

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Date: 08/15/2025

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