GROUP ADMIN GUIDE

FOR INTERNAL SITE USE ONLY

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Letter from the Vice President

You and your agency have already made an excellent decision to add eHome America's homebuyer education courses to your tool kit for your customers.

This guide will help you maneuver and find your way through the 'back side', the new, improved, Admin Panel, of eHome America.

If you have any comments, edits or additions, please send them to Mike Berryman, mberryman@ehomeamerica.org. Thanks for making eHome America part of your service delivery model!

Mike.

Mike Berryman

Vice-President – eHome   America Community Ventures Corporation

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Lexington, KY 40505

859-231-0054
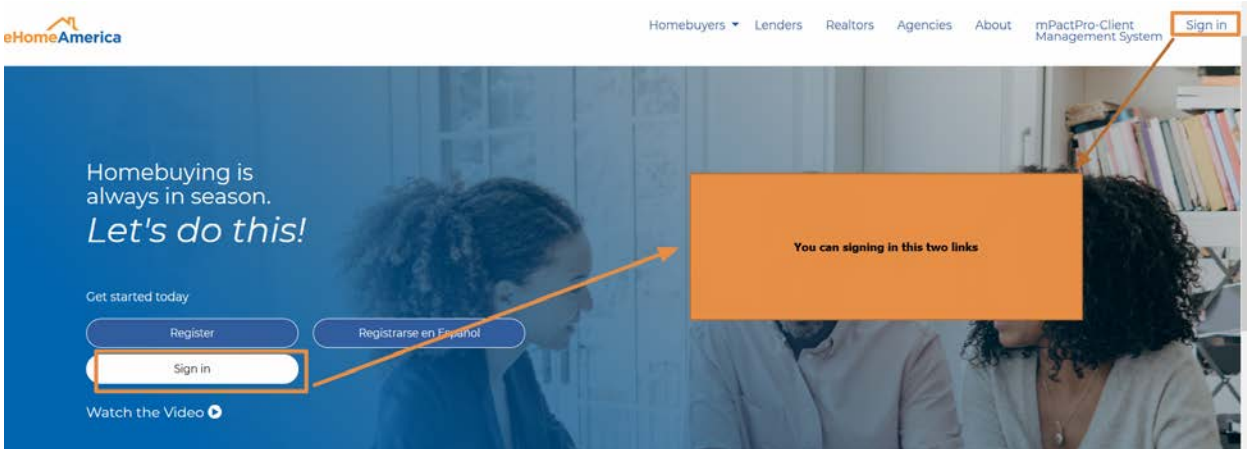
859-231-0261 Fax

844-24ehome

www.ehomeamerica.org

Educating and Financing A New Generation of Home and Business Owners

GETTING STARTED
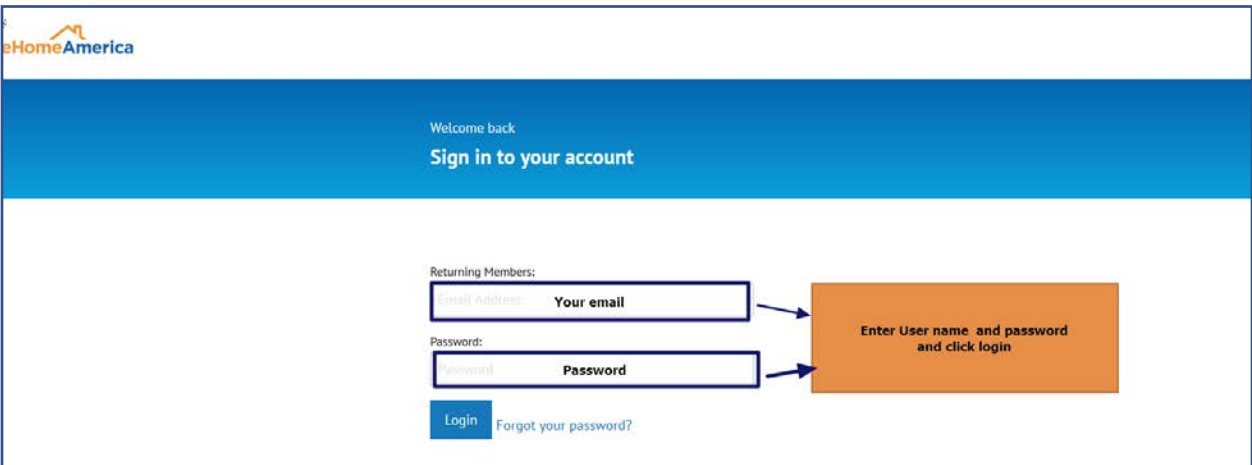
- **ADMIN LOGIN**

When you become a partner of eHome America, you will be given a log in name (Your email address and password).
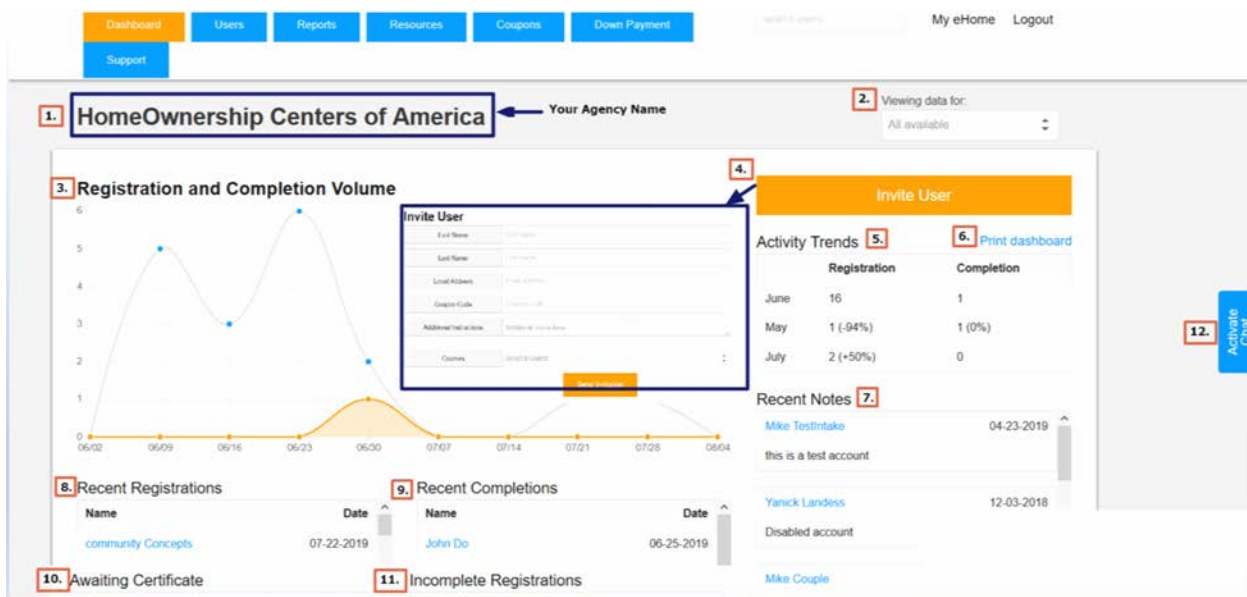

Go to www.ehomeamerica.org and log in at the top of the page and Click on the Link Sign in.

That will take you to your home page. If you want to take any or all of the course, your quiz and test results will be documented here just like for your customers.

- **YOUR DASHBOARD**

1. Your Agency Name.
2. You can view the data by courses, or you can display all the data for all courses.
3. Is the Graph of registration and completion volume.
4. You can invite a user by clicking on the link and enter the information with additional instruction or coupon you want to provide to them.
5. This is the Activity Trends of the most recent months.
6. You can print this information by clicking Print dashboard
7. When click on this option you can see the last Recent Notes Date Create and who create the note.
8. **Recent Registration:** You can click and view any recent user that have registered with your Agency, go to their profile and view their information.
9. **Recent Completions:** You can click and view any recent user that have complete any course with your Agency, go to their profile and view their information.
10. **Awaiting Certificate:** You can view the customer that have finish the course and are ready to be counseling.
11. **Incomplete Registration:** You can view the customer that start the registration but have not complete the process or the course.
12. **The Chat Feature:** Please have one of our Customer Services Representative to activate this feature for you if you wish to use, Is Free and is a good tool that Housing Counselors are taking advantage of this services that eHome America offer.

1. **My eHome**

When you click on My eHome it will take your home page, this page is the same that the customer will see when they registered with your Agency.
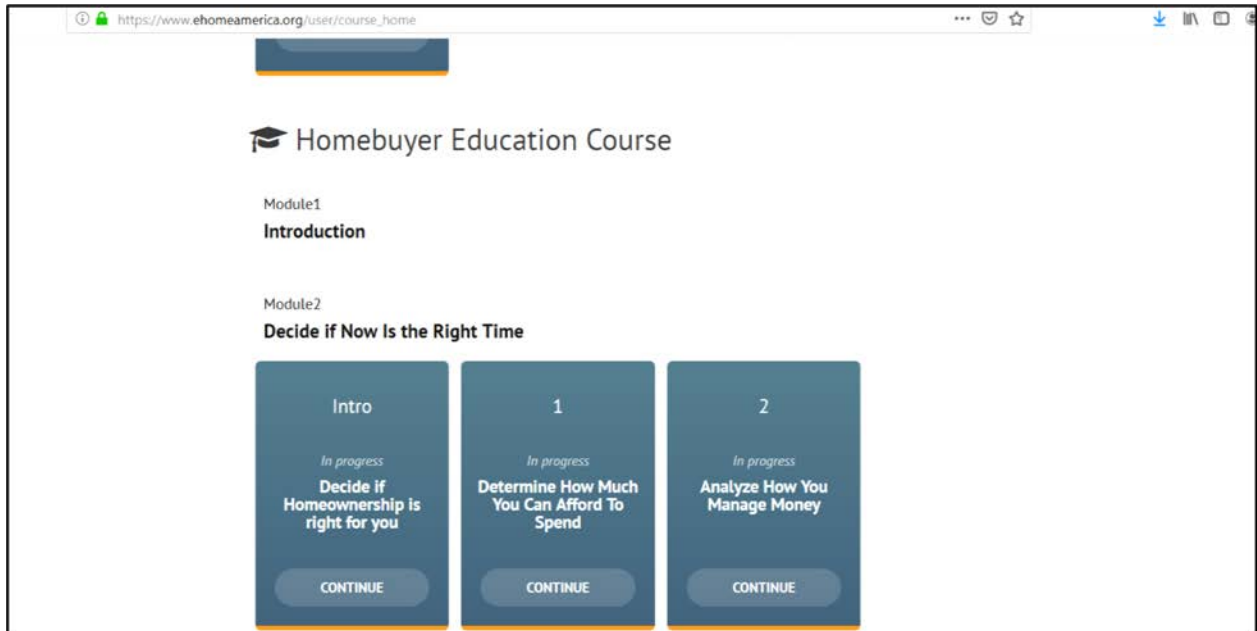On the right side you see phone number and agency contact.
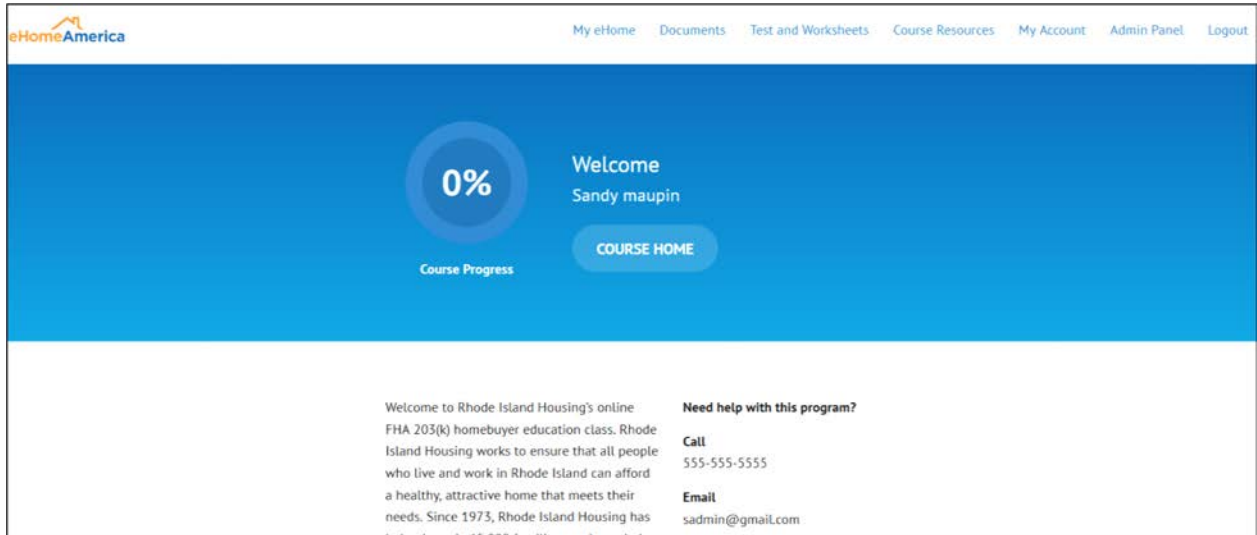
At the bottom of this page you click Begin Course and start taking the course if you wish Please Note: you as an Admin you can skip trough chapter on the test BUT the Customer would not have this option.
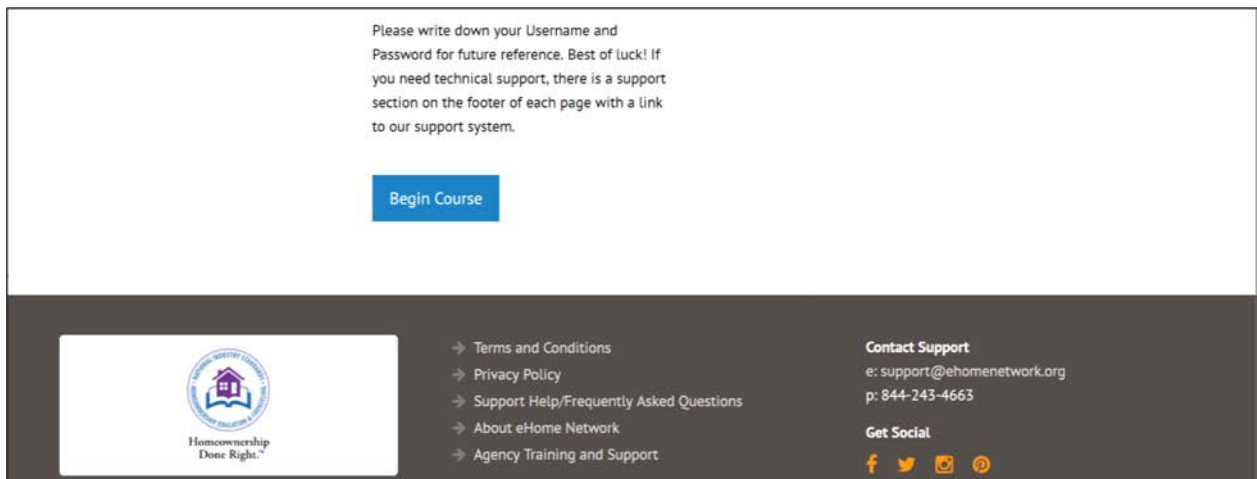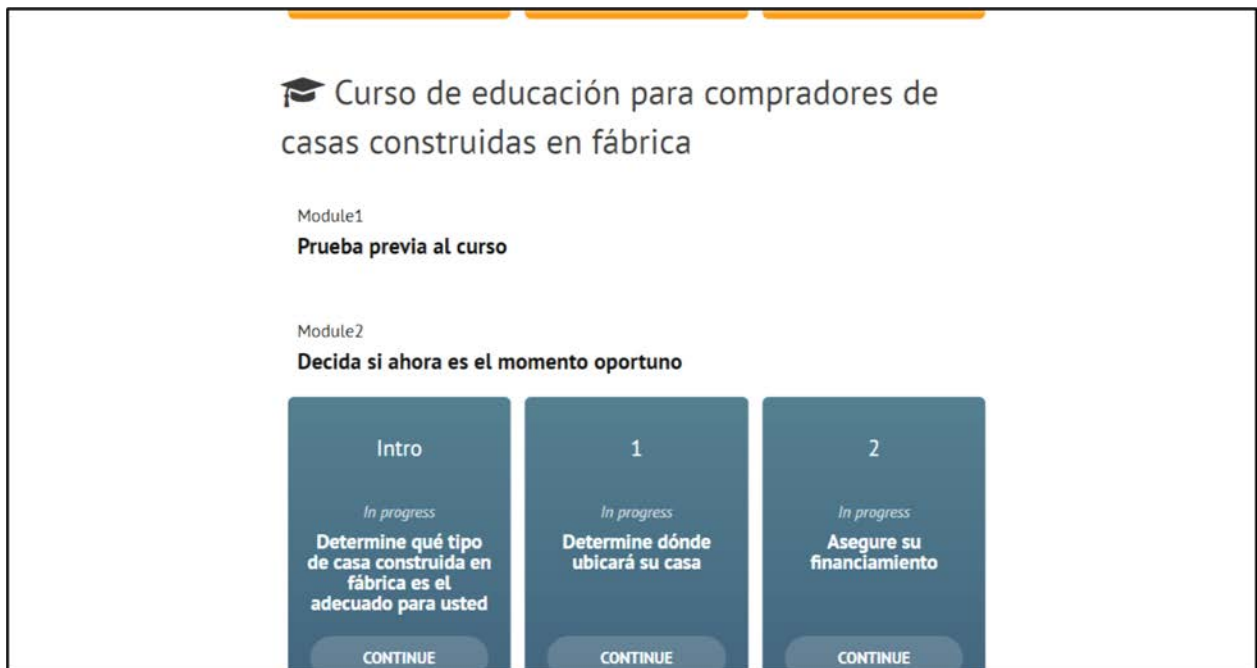

You can also see the course progress, or you can Click **COURSE HOME** and it will take you to the Course Home Page

2. **MY COURSE HOME**

From this page you will be available to see all the courses that your Agency offer, and you be available to click on any module of the courses showing in this page.
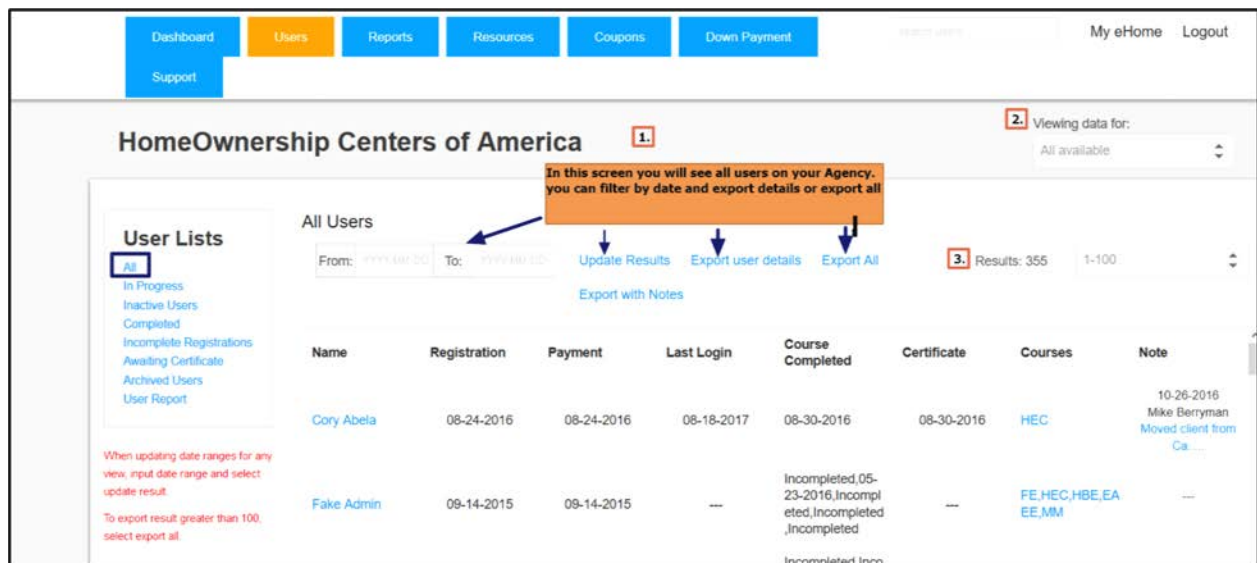
- **USERS**
1. All

The User Page has all of your customers – those who have begun registration, started the course, finished the course and those who are incomplete. As most customers complete this course in two to five days, an agency can plan on necessary counseling time based on the rate of new registrations and completions. You can also filter by course or group, if you are managing more than one group. There are eight options on the left side of this page.

1. You can search all users in a specific time frame, update the results, and then export the user information if desired. You can filter by date or you can export all.
2. You can filter data by course.
3. The default is to display 100 on the screen you can select the drop dropdown to view the rest or filter by date on data range.

2. IN PROGRESS

Are users who have registered but have not completed the course yet.

You can search all users in Progress for a specific time frame, update the results, and then export the user information if desired. You can filter by date or you can export all.

You can click on any customer name to view their information etc.

3. INACTIVE USERS

This page will display any inactive user.

You can filter and click on any name to view the customer information etc.

4. COMPLETE REGISTRATION

Will show the user that have completed their online course.

You can click on any name and view the customer information

5. INCOMPLETE REGISTRATION

This will show the customer that have not complete the payment.

6. AWAITING CERTIFICATE

are those who have completed the course but haven't had their certificate generated (only applicable if you are not allowing the user to print the certificate upon course completion).

7. ARCHIVED USERS:

8. USER REPORT

In this page you can view all the reports, type of reports and who created this report.

Inside user report

Export Date: The date you create the report.
Start Date: The date range you start capture data and the **End Date:** The last date the data is capture.
Filter: how you filter the data either all or one of the options.
Status: It will show you if the report was successfully created.
Records: Numbers of records found.
Created By: This tell you who created this report.

- **Reports**

On the Reports Page, you will have four reports options on the left-hand navigation pane. These are the Orders, Demographics, Surveys, And Report Exports. These reports will have date range search ability and the ability to export your results to Excel. Let's talk about these now.

1. **Orders:** This allows you to view the orders for your agency for the time frame specified. Note: This report only tracks orders and does not record any refunds or chargeback, those are done for individual customers and captured in their individual profiles and user notes.

2. **Demographics:** This is the report you will want to run to see the count of answers of the statistics questions for your users. This is particularly useful when you want to see a capture information of the demographic makeup of your customers, and if you need to share this information with any funding partners you can.

3. **Surveys:** When a client completes the course, they take a short end of course survey where we ask them about their course experiences. These results are emailed to you as well but are also captured in the Surveys report for you to review at any time.

4. **Report Exports:** In this page you can view all the reports, type of reports and who created this report.

- **RESOURCES**

The resources area of the admin panel is where you will find several items of interest. This will include some marketing pieces that can be customized with your agency name and logo, training materials (such as this document), but also course resources, administrative notifications, Agency Resources, Community Resources, and monthly statements, group eDocs and Discussion forum.

1. **Marketing Materials:** This is the area where we provide several different marketing pieces.

2. **Training Materials:** This section would include items such as the admin guide, documents we have created that you can download and personalize for your lenders and their clients, as well as webinar items like winning strategies.

3. **Course Resources :** This is where we include sections of the course for view/download by agencies, in both English and Spanish, as well as the answer keys to the quizzes/tests.

4. **Admin Notifications:** This area has all past Admin Notifications stored so you can go back and get this information on updates, etc.

5. **Agency Resources:** This is a resource area where you can upload something that you want to store in the admin panel. A document or something related to eHome that you might want to have stored within the admin panel. Only group admins from your agency would have access to them.

6. **Community Resources:** This is a similar area to the above, but available site wide for all admins. If you had a marketing idea you wanted to share with the entire eHome network, you could upload it here, and it would be visible for all our partner agencies.

7. **Training Videos:** This tab store all the training videos that we have available for View just click on the link and play the video.

8. **Reconciliation Statement:** This is the area where we upload your monthly statements for your activity you are being paid for. Your monthly fees are directly deposited around the 20th of the following month. You will need to access your statements to match payments for the online education customer orders.

User	Course Name	Course Fee	Coupon Discount	Fee Paid	Admin Fee	Sponsor Fee	Group Fee
Brian Peak	Homebuyer Education Cc	$99.00	$0.00	$99.00	$25.00	$0.00	$74.00
Brionna Franklin	Homebuyer Education Cc	$99.00	$0.00	$99.00	$25.00	$0.00	$74.00
LOEANNA JENKINS	Homebuyer Education Cc	$99.00	$5.00	$94.00	$25.00	$0.00	$69.00
		$297.00	$5.00	$292.00	$75.00	$0.00	$217.00

Customer's Names

Course Taking By the User

The course fee that the user have pay minus the discount that the user apply to this transaction = $ pay minus our admin fees and sponsor fee = Total amount pay to you.

9. **Group edocs:** from here you can view all the eDocs that are available for your agency. (please note: that this apply only if you are currently enrolled on eDocs with eHome America you will see your electronic documents from here and if you are not enroll please call our customer service or for information email us at: **support@ehomenetwork.org**

10. **Discussion forum:** is where you can post topics and share your opinions and feedbacks.

- **COUPONS**

The coupons page is where you can view active and expired coupons for your agency When a client registers for the course, there is the option for them to input a coupon code and receive a discount off the course fee of any dollar amount the agency wants to provide, up to whatever amount and including a 100% coupon to make the course free to the customer. When the customer registers and applies a coupon, that coupon will show up as having an additional use in the coupons page, as well as be captured in the user's profile. We will create this free of charge coupons in the amount of your course fee less the eHome America admin fee (i.e. If your course fee is $99 and your admin fee is $25, we can create coupons for $74 and your clients would pay $25 for the course). If the coupon amount is greater, there is a charge to be paid in advance to cover any discount to the eHome admin portion.

For information on how to get coupons for your agency contact eHome America Customer support from the Dashboard tab or call the number 844.243.4663

You can Export to excel the complete list of coupons too. On the left side is two options on how to view the coupons:

1. Active Coupon: In this screen you can view all your **Active** coupons.

2. Expired Coupon: In this screen you can view all your **Expired** coupons.

- **DOWN PAYMENT**

The Down Payment resource tool will open Down Payment Resource page

What this tool allows you to access one of the most comprehensive lists of down payment and closing cost assistance programs that an eHome America customer who completes education qualifies for. This list is updated and maintained by Down Payment Resource and is constantly being updated.

How the tool works is that you filter by the different filtering options (Property Information, Household Information, and Special Circumstances), and it will provide you with a list of down payment options that might benefit your customers. You can then drill down and see more specific information about these programs, including contact information for the program owners.

- **SUPPORT**

The support tab is to answer some of the question you may have with FAQ and if there is something else that is not in the FAQ you can select **+** New support ticket and create a ticket and our fully trained and qualified support team will be happy to help you or you can call at 844.243.4663 to speak with one of them we have a customer support assistant in Spanish also.
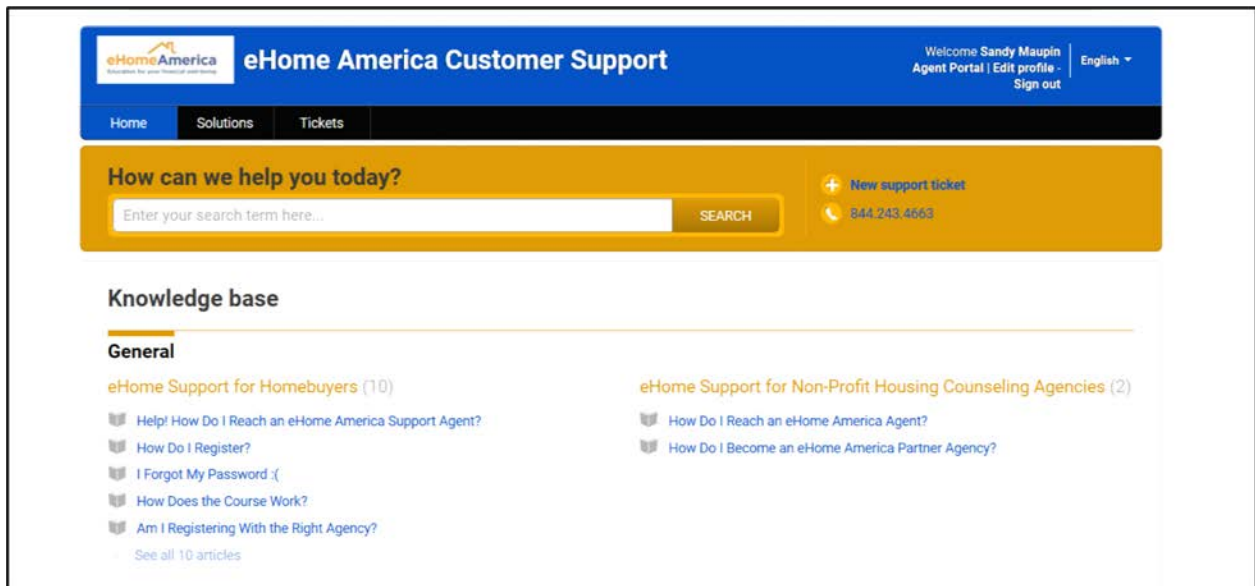
- **USER DATA INFORMATION**

Each of your customers will have a home page for their course(s). While the customer will fill in most of information, there are many opportunities for the administrator to go in assist, inquire and support the customer.
Customers can log in and out as many times as needed, over as many days/weeks as needed to complete the course. The system remembers where they were in the course and will provide them an option upon logging in to jump back to where they left off from the previous login.
Users can move forward one page at a time, they cannot skip forward through the course content, but they can navigate backwards as much as they want to review

course content.

From any of the locations where you see your customer's names within the Admin Panel, you can click on the user's name, and it will open their User Data screen. From here you can view all the information related to the customer, including their user and demographic data they entered upon registration, and view their test results and worksheet information.

1. **General:** Information Section is where you can view the course listing and progress for a customer, create a certificate if that customer has completed the course. View their certificate print track information for when a certificate is viewed, see/print the contact information for the customer, and view their login information, including the ability to reset their password if needed.
   On the right side of this page are any user notes related to this customer and the ability to add a note. Add a Support Case if the customer is in need of any type of technical support, and view the user's logins to their course

2. **Intake Questions** Section. This is the area where the client completed the demographics part of the registration, including their disclosure agreements. You can print this as well. The user notes and log in history to the right remains the same.

3. **User Documents:** This were you can view any eDocs Documents that is being assign to the customer either by you or any electronic document is being fill out at registration by the customer and the status of this documents and you can view and printing.
Or you have the option to add and present the customer with any electronic document for more information on eDocs please call eHome Customer services or email us at **support@ehomenetwork.org**

PLEASE NOTE: You can view documents if you have enabled eDocs

With eHome (is a good feature and free please email us for more info)

4. **Tests** Section. This is where you can view the **Test results** and responses for your customer, including tests they have passed and tests they might have failed including all questions and answers. Just click the view button to view a test result, or the + or – to view any failed attempts.

User Data

General
Intake Questions
User Documents
Tests
Worksheets
Completion Msg
Sent Emails
User Administration
API Information
Print User Details
View Home Page

Test Progress   Export to Excel   Print Test Result

Home Buyer Education

Test Name	Score	View Results
Pre Test	82	View
Is Owning a Home Right for You	100	View **+**
How Do You Buy a Home?	100	View
Costs of Homeownership	100	View
Prueba del capítulo: Determine dónde ubicará su casa	100	View
How Much Can You Afford	100	View

5. **Worksheets** Section. This is where the customer's worksheet information will reside once they have completed the worksheet(s) in the course. If a customer has not attempted the worksheets yet, they will have no results.

User Documents
Tests
Worksheets
Completion Msg
Sent Emails
User Administration
API Information
Print User Details
View Home Page

1 What is your gross monthly income? (Remember, your gross monthly income is your income before any deductions are taken out).

Gross Monthly Income   : $500

Total   :   **500**

2 What is your net monthly income? (Remember, your net monthly income is your income after any deductions are taken out).

Net Monthly Income   : $500

Total   :   **500**

3 Do you have any other assets listed below?

Checking Account Balance   : $100

Savings Account Balance   : $0

Mutual Funds and Stocks   : $0

Retirement Accounts   : $0

Total   :   **100**

4 How much is your rent or mortgage payment per month?

Mortgage   : $300

Total   :   **300**

6. **Completion Msg** Section shows the completion message the client received upon finishing the course with further instructions on how to receive the certificate of completion.

7. **Sent Emails** section allows you to view all the emails the client received during the registration, payment and course section.

8. **User Administration** Section. This is where you can view the user's registration and order information including coupon usage (if applicable), total charge for the course, and their payment Transaction ID. Any transaction log information will be present here as well.

9. **API Information:** Record the time when the information of the customer is send to podio.

API Information

Api call 1 - Homebuyer Education Course
Date time: 07-17-2019 1:33 am
Podio item Id: 1180939945

Api call 2
Date time: 07-17-2019 1:35 am
Podio item Id: 1180939945

Click here to manually send API 3

User Data
General
Intake Questions
User Documents
Tests
Worksheets
Completion Msg
Sent Emails
User Administration
API Information
Print User Details
View Home Page
Cosigner Information

10. **Print User Details**: Is download in a PDF is all the information of the user.

Education for your financial well-being

Test, sandy

HomeOwnership Centers of America

Account Information

Course	Course Fee	Coupon Code
Homebuyer Education Course	**99.00**	**HOCAFREE**
Registration Date	Completion Date	Certificate Date
07-17-2019	**11-30--0001**	---

Contact Information

Email	Phone	Address	County
sandy_07172019@mail.com	555 - 555 - 5555	**1213 Laffoon dr, , Frankfort, Kentucky, 40601**	**Carroll**

Registration Information

Date of Birth	Age Range	U.S. Citizen
1-19-1986	**26-35**	**Yes**
Gender	Ethnicity	Are you a First Time Homebuyer?
Female	**Hispanic**	**Yes**

11. **View Home Page:** Is where you can view the user home page.
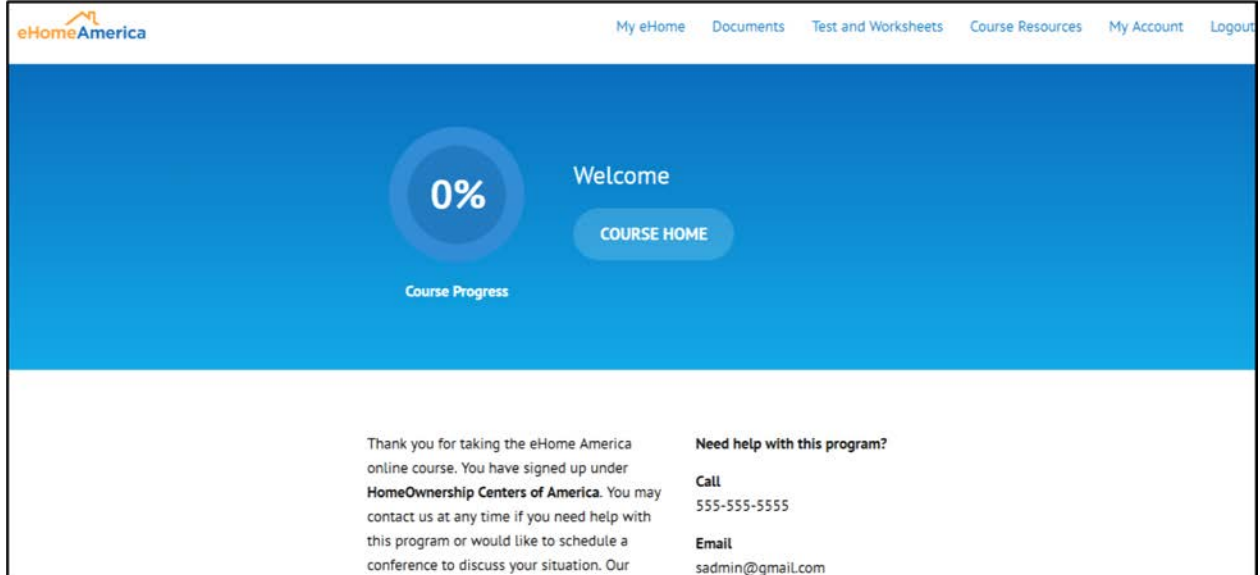
12. **Cosigner information:** You can view the Co-signer information and view the name and email address and update password. If the buyer has a co-signer only.
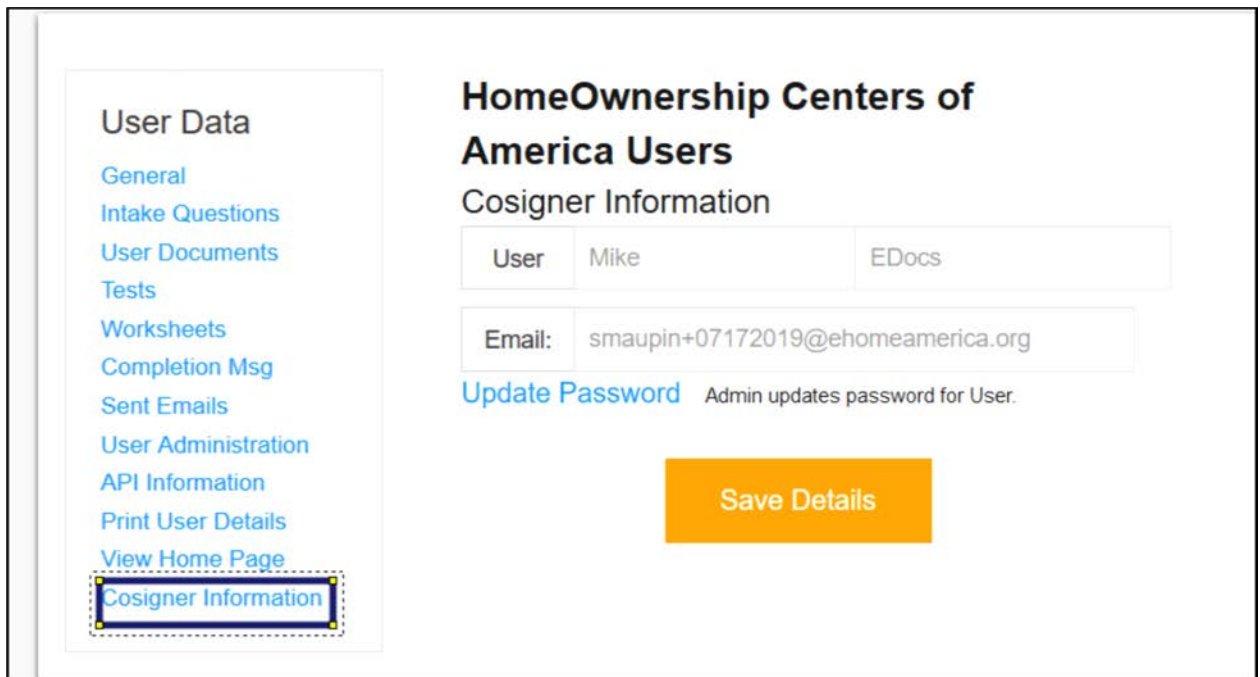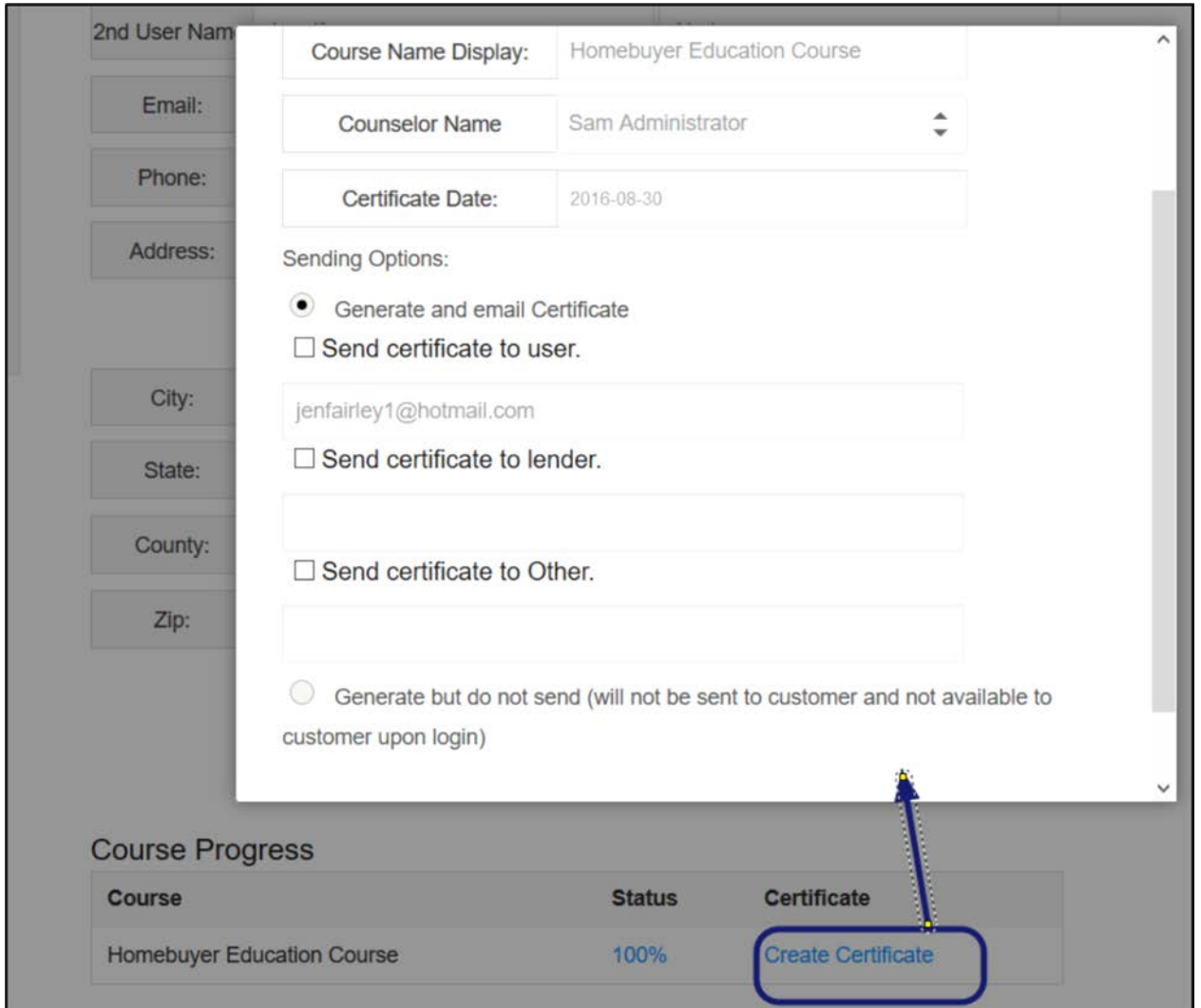
- **HOW TO CREATE CERTIFICATE**

1. Once you have logged into your eHome America account, you will see clients who have completed the course listed under both "Recent Completions" and "Awaiting Certificate." Click the client's name you are generating a certificate for.

2. This will take you to the client's account. Scroll down to the "Course Progress" section and click the button for "Create Certificate."

3. A "Create Certificate" window will pop up and you can them either:
   1) Generate and email the certificate to the client or
   2) Generate the certificate so you can download it or print it.

4. Once the certificate has been created, click the link titled "View" if you would like to print or download. (also, you can delete and recreate the certificate in case the name of the user it needs to be change or add a second user to the account)

- **Direct Deposit Form**

Please complete the **Direct Deposit Form** attached so that we can make sure you are paid every month for the previous month's registrations. Please be sure to include a copy of a cancelled check. This should be emailed to me at support@ehomenetwork.org.

For any and all technical assistance for both you and your clients, please do not hesitate to contact us at **support@ehomenetwork.org or 844.24eHome**. The eHome Support Team will be happy to assist!