



GROUP ADMIN GUIDE

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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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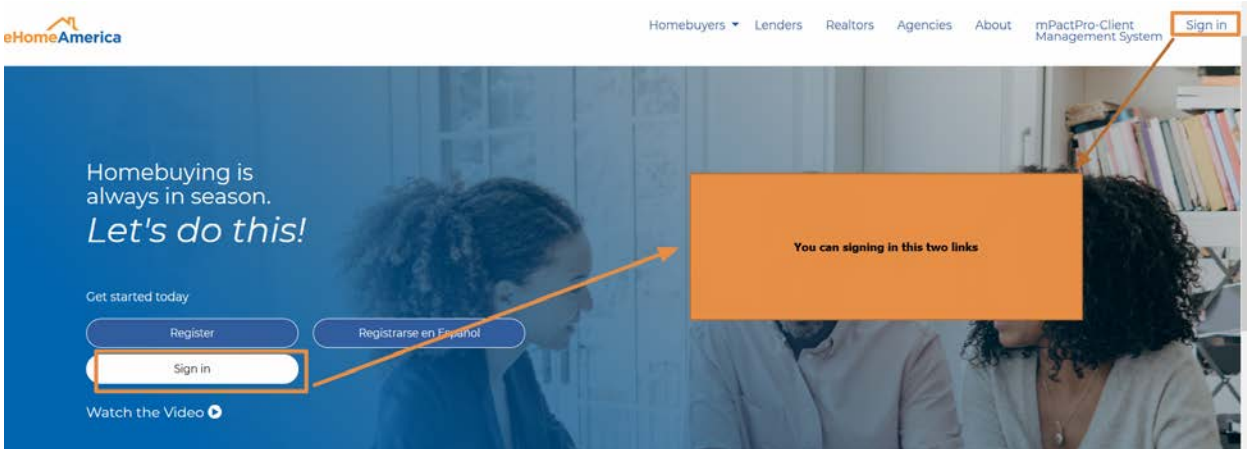
www.ehomeamerica.org

Educating and Financing A New Generation of Home and Business Owners

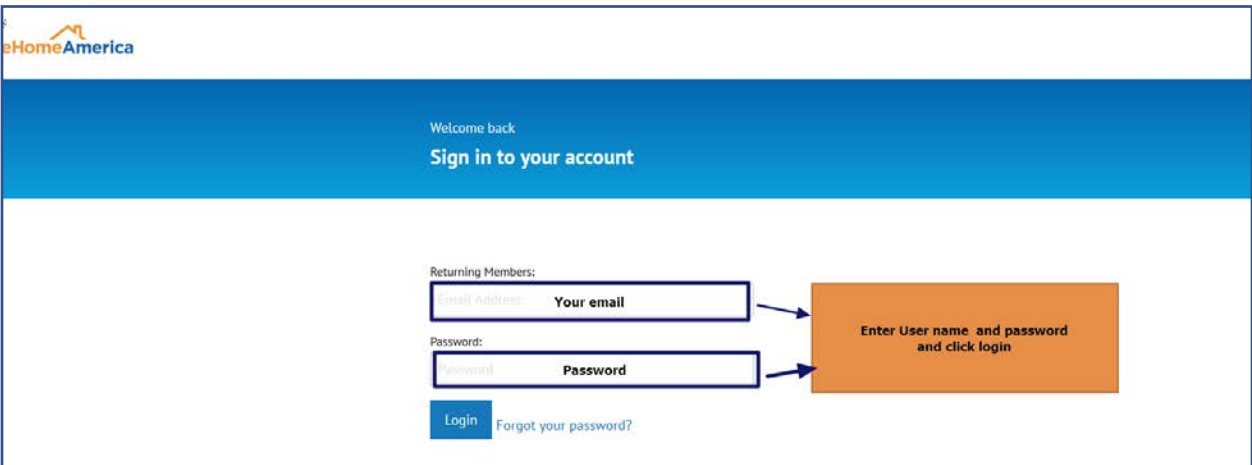
GETTING STARTED

- ADMIN LOGIN

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

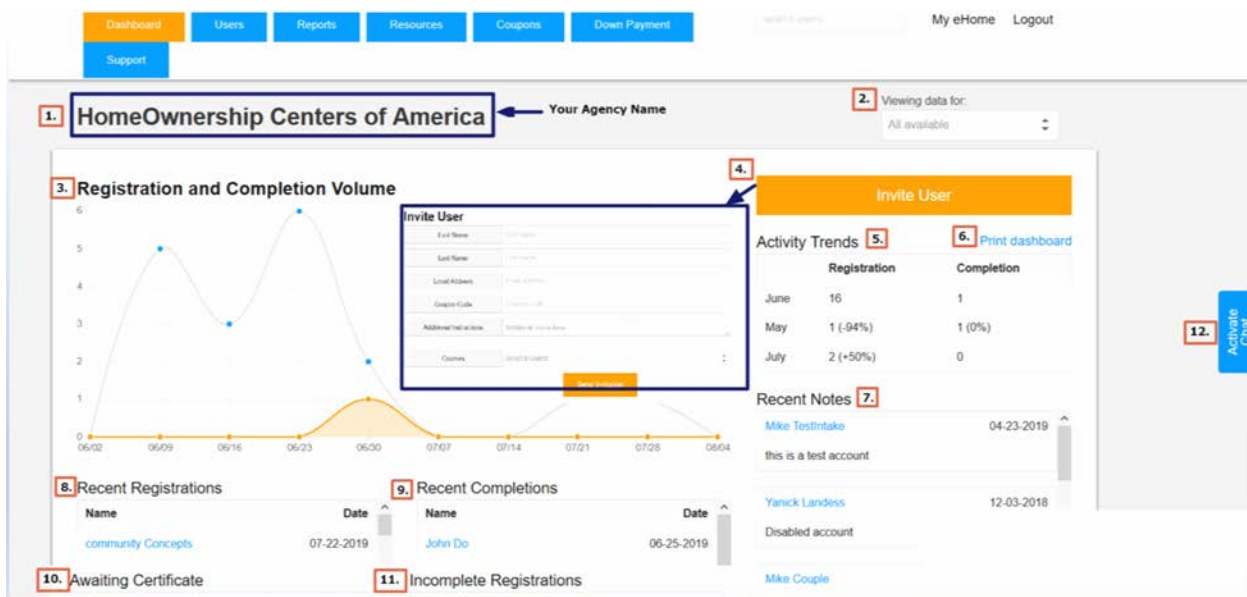


Go to www.ehomeamerica.org and log in at the top of the page and Click on the Link Sign in.



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.

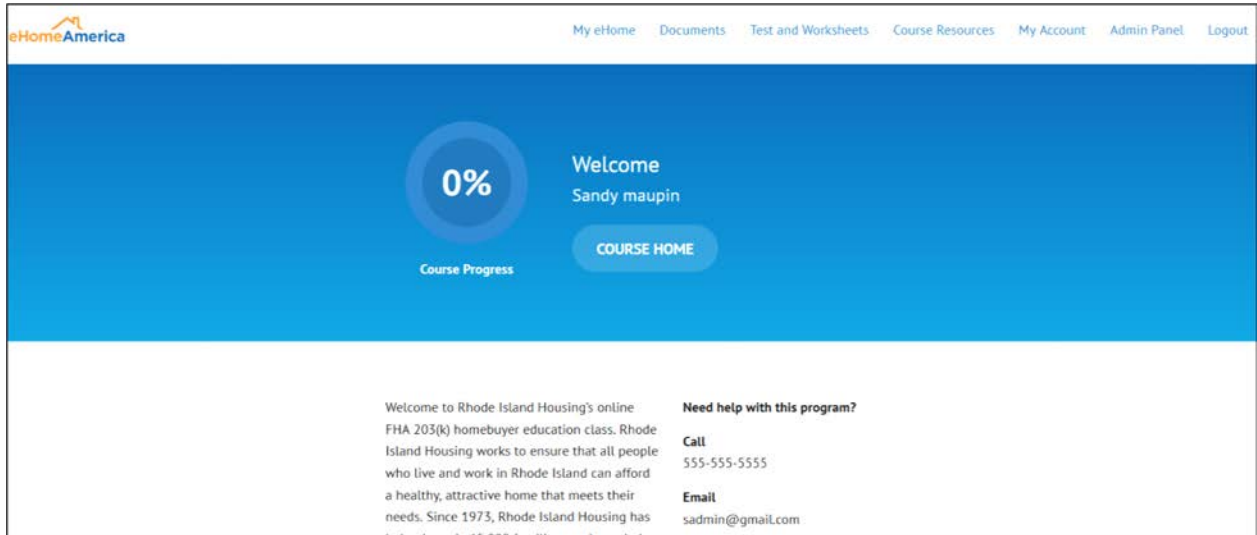
- **YOUR DASHBOARD**



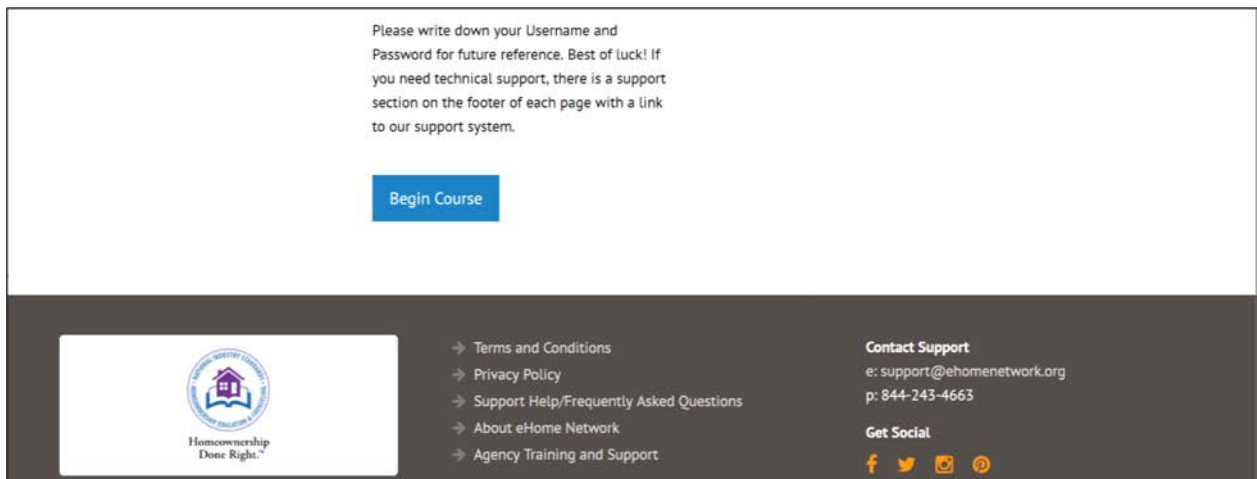
1. Your Agency Name.
2. You can view the data by courses, or you can display all the data for all courses.
3. Is the Graph of registration and completion volume.
4. You can invite a user by clicking on the link and enter the information with additional instruction or coupon you want to provide to them.
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.



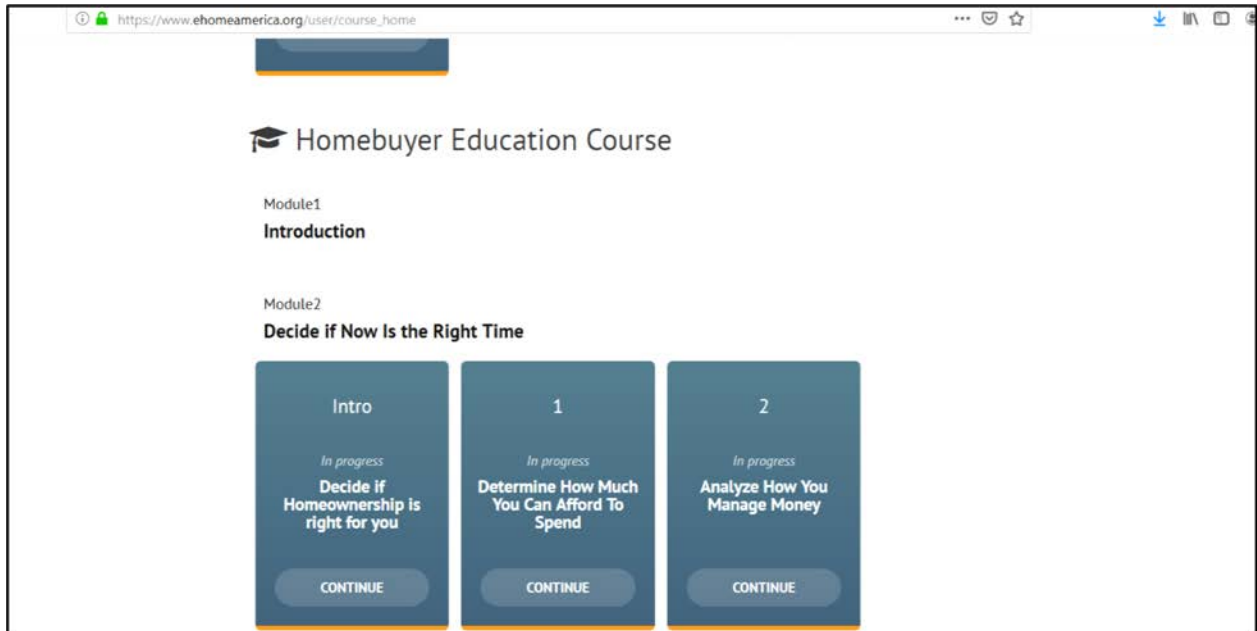
At the bottom of this page you click Begin Course and start taking the course if you wish Please Note: you as an Admin you can skip trough chapter on the test BUT the Customer would not have this option.



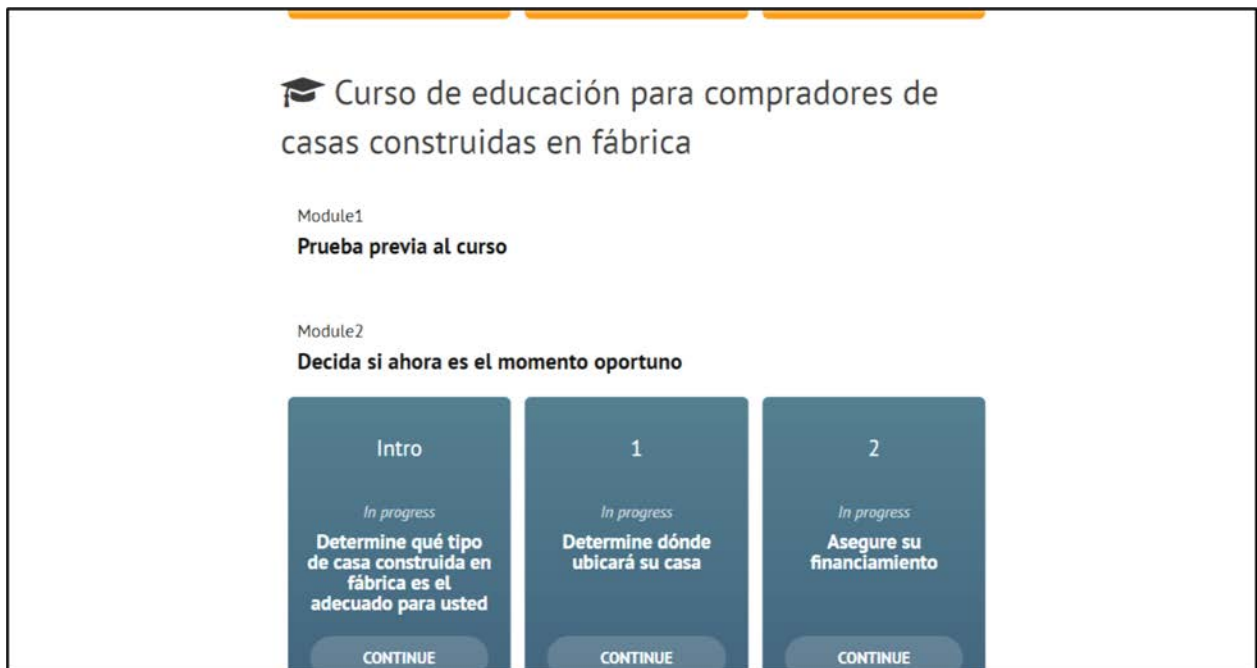
You can also see the course progress, or you can Click **COURSE HOME** and it will take you to the Course Home Page

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.



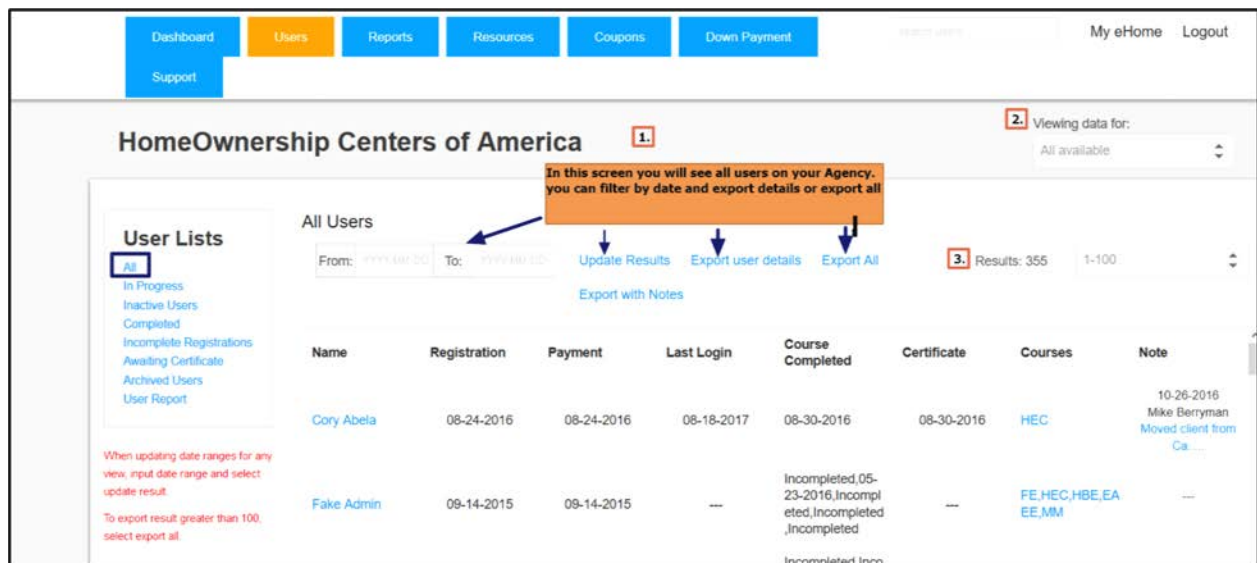
The screenshot shows a web browser window with the URL https://www.ehomeamerica.org/user/course_home. The page title is "Homebuyer Education Course". Under "Module1", the title is "Introduction". Under "Module2", the title is "Decide if Now Is the Right Time". There are three course cards in a row, each with a "CONTINUE" button. The first card is titled "Intro" and "Decide if Homeownership is right for you". The second card is titled "1" and "Determine How Much You Can Afford To Spend". The third card is titled "2" and "Analyze How You Manage Money". Each card also has "In progress" written above the title.



The screenshot shows a web page with the title "Curso de educación para compradores de casas construidas en fábrica". Under "Module1", the title is "Prueba previa al curso". Under "Module2", the title is "Decida si ahora es el momento oportuno". There are three course cards in a row, each with a "CONTINUE" button. The first card is titled "Intro" and "Determine qué tipo de casa construida en fábrica es el adecuado para usted". The second card is titled "1" and "Determine dónde ubicará su casa". The third card is titled "2" and "Asegure su financiamiento". Each card also has "In progress" written above the title.

- **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.

The screenshot displays the 'HomeOwnership Centers of America' user management interface. At the top, there is a navigation bar with buttons for Dashboard, Users (highlighted), Reports, Resources, Coupons, and Down Payment. A search bar and 'My eHome Logout' are also present. Below the navigation bar, the page title 'HomeOwnership Centers of America' is shown, along with a 'Viewing data for:' dropdown set to 'All available'. The main content area is titled 'In progress Users' and includes a 'User Lists' sidebar with options like All, In Progress (highlighted), Inactive Users, Completed, Incomplete Registrations, Awaiting Certificate, Archived Users, and User Report. The main area features a table with columns: Name, Registration, Payment, Last Login, Course Completed, Certificate, Courses, and Note. Three users are listed: 'community Concepts', 'sandy Test', and 'Michael Berryman'. The table also includes search filters for 'From' and 'To' dates, and buttons for 'Update Results', 'Export user details', 'Export All', and 'Export with Notes'. A 'Results: 3' indicator and a pagination dropdown are also visible.

Name	Registration	Payment	Last Login	Course Completed	Certificate	Courses	Note
community Concepts	07-22-2019	07-22-2019	07-22-2019	Incompleted	--	HEC	---
sandy Test	07-17-2019	07-17-2019	07-17-2019	Incompleted	--	HEC	---
Michael Berryman	09-18-2012	10-23-2013	07-19-2019	Incompleted	--	HBE	08-02-2013 Mike Berryman test at 1 30pm EST ...

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.

The screenshot shows a web application interface for HomeOwnership Centers of America. At the top, there is a navigation bar with buttons for Dashboard, Users (highlighted), Reports, Resources, Coupons, and Down Payment. On the right, there are links for My eHome and Logout. Below the navigation bar, the page title is "HomeOwnership Centers of America" and it indicates "Viewing data for: All available".

The main content area is titled "Inactive Users" and includes a "User Lists" sidebar on the left with options: All, In Progress, Inactive Users (highlighted), Completed, Incomplete Registrations, Awaiting Certificate, Archived Users, and User Report. Below the sidebar, there are date range filters (From: YYYY-MM-DD, To: YYYY-MM-DD), buttons for "Update Results", "Export user details", "Export All", and "Export with Notes", and a "Results: 252" indicator with a "1-100" dropdown.

The main table displays the following data:

Name	Registration	Payment	Last Login	Course Completed	Certificate	Courses	Note
Sam Administrator	02-13-2009	04-24-2012	11-14-2018	Incompleted	---	HBE	---
Ahead Agency	10-17-2018	10-17-2018	10-23-2018	Incompleted	---	HEC	---
NHS of New Britain Agency	11-19-2018	11-19-2018	11-19-2018	Incompleted	---	HEC	---
NHSB Agency	11-19-2018	11-19-2018	11-19-2018	Incompleted	---	HEC	---

Additional text in the interface includes: "When updating date ranges for any view, input date range and select update result." and "To export result greater than 100, select export all."

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.

The screenshot displays the 'HomeOwnership Centers of America' user management interface. At the top, there is a navigation menu with buttons for Dashboard, Users (highlighted), Reports, Resources, Coupons, and Down Payment. A search bar and 'My eHome' / 'Logout' links are also present. The main content area is titled 'Completed Users' and includes a 'User Lists' sidebar with options like All, In Progress, Inactive Users, Completed (highlighted), Incomplete Registrations, Awaiting Certificate, Archived Users, and User Report. The main table shows user details with columns for Name, Registration, Payment, Last Login, Course Completed, Certificate, Courses, and Note. Two users are listed: Minnie Mouse and William Johnson. A 'Viewing data for:' dropdown is set to 'All available'. Below the table, there are instructions for updating date ranges and exporting results.

Name	Registration	Payment	Last Login	Course Completed	Certificate	Courses	Note
Minnie Mouse	10-20-2011	04-24-2012	10-10-2018	07-18-2012	--	HBE	07-18-2012 Sam Administrator Minnie called and sh...
William Johnson	05-09-2013	05-09-2013	06-23-2014	05-10-2013	--	HBE	06-26-2013 Sam Administrator William Johnson will...

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.

The screenshot displays a web application interface for 'HomeOwnership Centers of America'. The top navigation bar includes 'Dashboard', 'Users', 'Reports', 'Resources', 'Coupons', and 'Down Payment'. A search bar and 'My eHome Logout' are also present. The main content area is titled 'HomeOwnership Centers of America' and shows a 'Viewing data for:' dropdown set to 'All available'. Below this, there's a 'User Lists' sidebar with options like 'All', 'In Progress', 'Inactive Users', 'Completed', and 'Incomplete Registrations' (which is highlighted). The main section is titled 'Incomplete Registrations Users' and features a table with columns: Name, Registration, Payment, Last Login, Course Completed, Certificate, Courses, and Note. The table lists two users: Francia Gonzalez and Mary Homebuyer. A note for Mary Homebuyer mentions '10-27-2017 Michael Berryman This is a test note'. There are also filters for 'From' and 'To' dates, and buttons for 'Update Results', 'Export user details', 'Export All', and 'Export with Notes'. The results show 6 items, with 1-5 displayed.

Name	Registration	Payment	Last Login	Course Completed	Certificate	Courses	Note
Francia Gonzalez	06-29-2018	---	---	Incompleted, Incompleted	---	CDEPCDV, HEC	---
Mary Homebuyer	01-01-2017	---	12-13-2018	01-17-2017, 01-17-2017	01-17-2017	HEC, HEC	10-27-2017 Michael Berryman This is a test note

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).

The screenshot shows a web application interface for 'HomeOwnership Centers of America'. The top navigation bar includes 'Dashboard', 'Users', 'Reports', 'Resources', 'Coupons', and 'Down Payment'. The main content area is titled 'HomeOwnership Centers of America' and displays 'Incomplete Registrations Users'. A sidebar on the left lists 'User Lists' with options like 'All', 'In Progress', 'Inactive Users', 'Completed', 'Incomplete Registrations', 'Awaiting Certificate', 'Archived Users', and 'User Report'. The 'Awaiting Certificate' option is highlighted. The main table shows user details with columns: Name, Registration, Payment, Last Login, Course Completed, Certificate, Courses, and Note. Two users are listed: Francia Gonzalez and Mary Homebuyer. The 'Awaiting Certificate' user is highlighted in the table.

Name	Registration	Payment	Last Login	Course Completed	Certificate	Courses	Note
Francia Gonzalez	06-29-2018	---	---	Incompleted, Incompleted	---	CDEPCDV,HEC	---
Mary Homebuyer	01-01-2017	---	12-13-2018	01-17-2017,01-17-2017	01-17-2017	HEC,HEC	10-27-2017 Michael Berryman This is a test note

7. ARCHIVED USERS:

8. USER REPORT

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

HomeOwnership Centers of America

Viewing data for: All available

User Lists		User Reports								
		Group Name	Export Date	Start Date	End Date	Filter	Status	Records	Created by	
All		HomeOwnership Centers of America	04-23-2019	01-01-2019	04-23-2019	All	Created	20	Michael Berryman	
In Progress		HomeOwnership Centers of America	03-26-2019	01-01-2019	03-26-2019	All	Created	6	Michael Berryman	
Inactive Users		HomeOwnership Centers of America	03-26-2019	03-01-2019	03-26-2019	All	Created	4	Sandy Stone	
Completed		HomeOwnership Centers of America	03-26-2019	03-01-2019	03-26-2019	All	Created	4	Sandy Stone	
Incomplete Registrations		HomeOwnership Centers of America	03-06-2019	00-00-0000	00-00-0000	All	Created	311	Michael Berryman	
Awaiting Certificate		HomeOwnership Centers of America	01-15-2019	01-01-2018	01-15-2019	All	Created	85	Michael Berryman	
Archived Users		HomeOwnership Centers of America	08-29-2018	04-01-2018	08-29-2018	All	Created	50	Michael Berryman	
User Report		HomeOwnership Centers of America	08-06-2018	01-01-2018	08-06-2018	All	Created	50	Michael Berryman	

When updating date ranges for any view, input date range and select update result.

To export result greater than 100, select export all.

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.

HomeOwnership Centers of America Viewing data for: All available

Report Types

- Orders
- Demographics
- Surveys
- Report Exports

Orders

From: YYYYMMDD To: YYYYMMDD [Update Results](#) [Export to Excel](#) Results: 311 1-100

[Export All](#)

When updating date ranges for any view, input date range and select update result.
To export result greater than 100, select export all.

Name	Payment	Course	Fee	Discount	Coupon used	Paid	Net Revenue
Cory Abela	08-24-2016	Homebuyer Education Course	\$50.00	\$0.00	---	\$50.00	\$20.00
Sam Administrator	04-24-2012	Home Buyer Education	\$35.00	\$0.00	---	\$0.00	\$0.00
Ahead Agency	10-17-2018	Homebuyer Education Course	\$99.00	\$99.00	HOCAFREE	\$0.00	-\$25.00
Bob Counselor	10-30-2017	Post Purchase Homeowner Education	\$0.00	\$0.00	---	\$0.00	\$0.00
Bob Counselor	10-30-2017	Curso de Educación para compradores de vivienda	\$0.00	\$0.00	---	\$0.00	\$0.00
Bob Counselor	10-30-2017	Money Management	\$0.00	\$0.00	---	\$0.00	\$0.00
Bob Counselor	10-30-2017	Homebuyer Education Course	\$0.00	\$0.00	---	\$0.00	\$0.00
Bob Counselor	10-30-2017	Foreclosure Education	\$0.00	\$0.00	---	\$0.00	\$0.00
Total Discount		Total Fee	Total Paid		Total Revenue		
\$		\$	\$		\$		

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.

HomeOwnership Centers of America Viewing data for: All available

Report Types: Orders, Demographics, Surveys, Report Exports

Demographics

From: YYYY-MM-DD To: YYYY-MM-DD [Update Results](#) [Export to Excel](#) [Export User Test Results](#)

Question	Answer Option	Count	Percent
US Citizen	Yes	159	55.4%
	No	107	37.28%
	Choose not to disclose	2	0.7%
	No Selection	19	6.62%
Gender	Male	90	31.36%
	Female	91	31.71%

When updating date ranges for any view, input date range and select update result.
To export result greater than 100, select export all.

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.

HomeOwnership Centers of America Viewing data for: All available

Report Types
[Orders](#)
[Demographics](#)
[Surveys](#)
[Report Exports](#)

Surveys
 From: 2016-11-01 To: 2019-09-09 [Update Results](#) [Print Summary](#) Results: 5
[Print User Detail](#)

Question	Answer Option	Count	Percent
		0	0%
The information was thorough and clear		5	
	Strongly Agree	1	20%
The organization of content was clear		5	
	Strongly Agree	1	20%
The course objectives were clearly stated		5	
	Strongly Agree	4	80%

When updating date ranges for any view, input date range and select update result.
 To export result greater than 100, select export all.

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.

Agency Name DEC17		Course Fee	Coupon Discount	Fee Paid	Admin Fee	Sponsor Fee	Group Fee
User	Course Name						
Brian Peak	Homebuyer Education Cc	\$99.00	\$0.00	\$99.00	\$25.00	\$0.00	\$74.00
Brianna Franklin	Homebuyer Education Cc	\$99.00	\$0.00	\$99.00	\$25.00	\$0.00	\$74.00
LISEANNA 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](tel: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

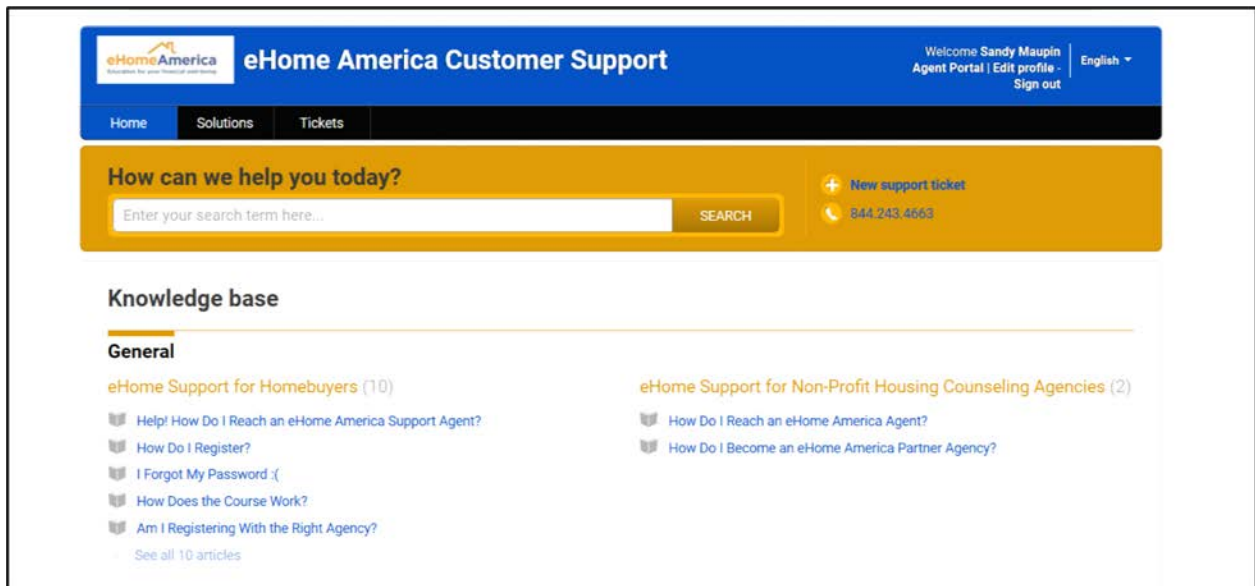
What this tool allows you to access one of the most comprehensive lists of down payment and closing cost assistance programs that an eHome America customer who completes education qualifies for. This list is updated and maintained by Down Payment Resource and is constantly being updated.

The screenshot shows the 'Down Payment' resource tool interface. At the top, there is a navigation menu with tabs for Dashboard, Users, Reports, Resources, Coupons, and Down Payment (highlighted in orange). A search bar for users and links for 'My eHome' and 'Logout' are also present. The main content area is divided into three sections: 'Property Information' (highlighted in orange), 'Household Information', and 'Special Circumstances'. The 'Property Information' section includes instructions to enter the street address and zip code, or use a general search. It features input fields for 'Street Address' and 'Zip Code', a 'General Search' field, and an 'Estimated sales price' field. Below these are radio buttons for 'Is this a Multi-Family Home?' (Single-Family selected) and 'Is the home in foreclosure?' (No selected). A 'Continue' button is at the bottom. The 'Special Circumstances' section shows a 'Matched Programs' box with a 'View Programs' button. On the right side, there is an 'Ask a Question' section with a 'Submit' button.

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](tel: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

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](#)

Contact Information [Add second User](#)

User Name: Sandy Test

Email: sandy_07172019@mail.com

Phone: 555 - 555 - 5555

Address: 1213 Laffoon dr

City: Frankfort

State: Kentucky

County: Carroll

Zip: 40601

[Save Details](#)

Recent Notes

There are no notes.

[Add Note](#)

User Logins

Login	Logout
07-17-2019 01:33pm	07-17-2019 04:50pm

Total: 03:17:13 Hours

Course Progress

Course	Status	Certificate
Homebuyer Education Course	0%	—

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.

Test, Sandy

User Data

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

Intake Questions

* Date of Birth	1	19	1986
* Age Range	26-35		
* U.S. Citizen	Yes		
* Gender	Female		
* Ethnicity	Hispanic		
* Are you a First Time Homebuyer?	Yes		
* Are you proficient in speaking English?	Yes		
* Race	White		
* Marital Status	Single		
* Household Type	Single Adult		

Recent Notes

There are no notes.

[Add Note](#)

User Logins

Login	Logout
07-17-2019 01:33pm	07-17-2019 04:50pm
Total: 03:17:13 Hours	

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 capitulo: 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.

User Data

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

Completion Messages

Congratulations!

Congratulations on completing the online Home Buyer education through our demo agency!

Please contact us at 123-456-7890 for your follow up and to receive your certificate.
Or to chat with an available agent now, click the link below.

[View and Download Certificate](#)

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

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

Sent Emails

Date	Subject	Recipient
10-17-2018	Welcome to eHome America -1259	delete_testing@mail.com

< [Redacted] >

Incomplete Registration Email

No incomplete registration mail is sent to this user.

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.

[Completion msg](#)

[Sent Emails](#)

[User Administration](#)

[API Information](#)

[Print User Details](#)

[View Home Page](#)

[Cosigner Information](#)

Homebuyer Education Course

Registered:	07-17-2019 01:33pm
Status:	Completed
Order Begun:	07-17-2019 01:33pm
Order Placed:	Order is not placed
Order Completed:	07-17-2019 01:33pm
Coupon:	Yes(HOCAFREE / \$99.00)
Course Charge:	\$0.00
Transaction ID:	G15U565096

Transaction Log

2019-07-17 13:33:09:	New order created
2019-07-17 13:33:09:	Continuing existing, incomplete order (status: Not Entered)
2019-07-17 13:33:09:	Added course ID 1259 to the order
2019-07-17 13:33:09:	Order status set to "Entered"
2019-07-17 13:33:16:	Continuing existing, incomplete order (status: Entered)

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

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](#)

API Information

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

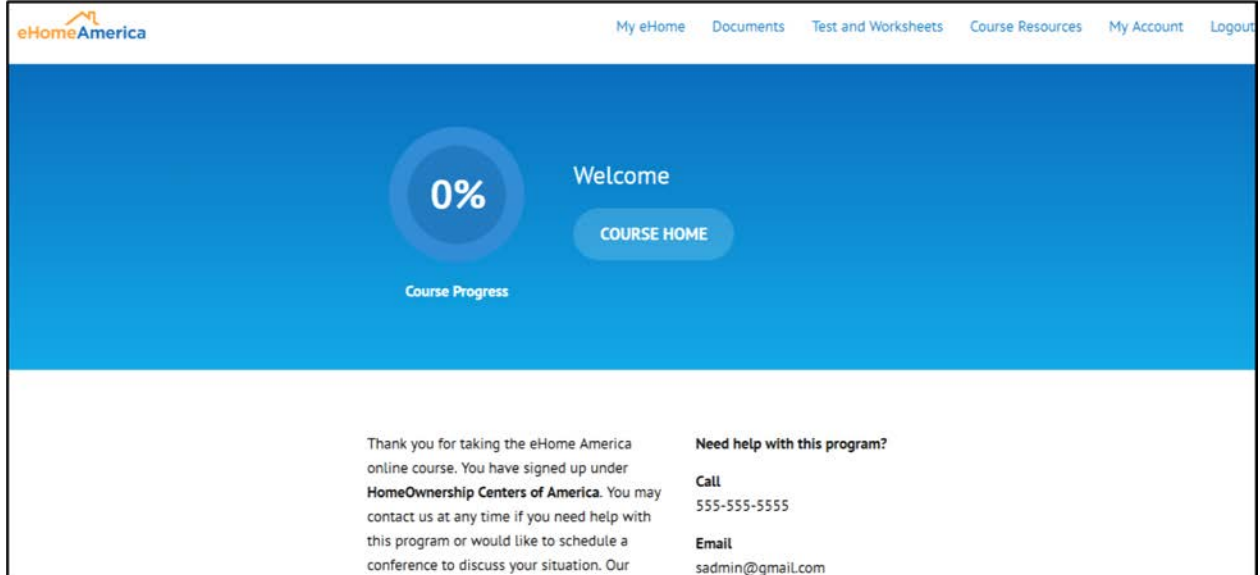
Api call 2
Date time: 07-17-2019 1:35 am
Podio item Id: 1180939945

Click [here](#) to manually send API 3

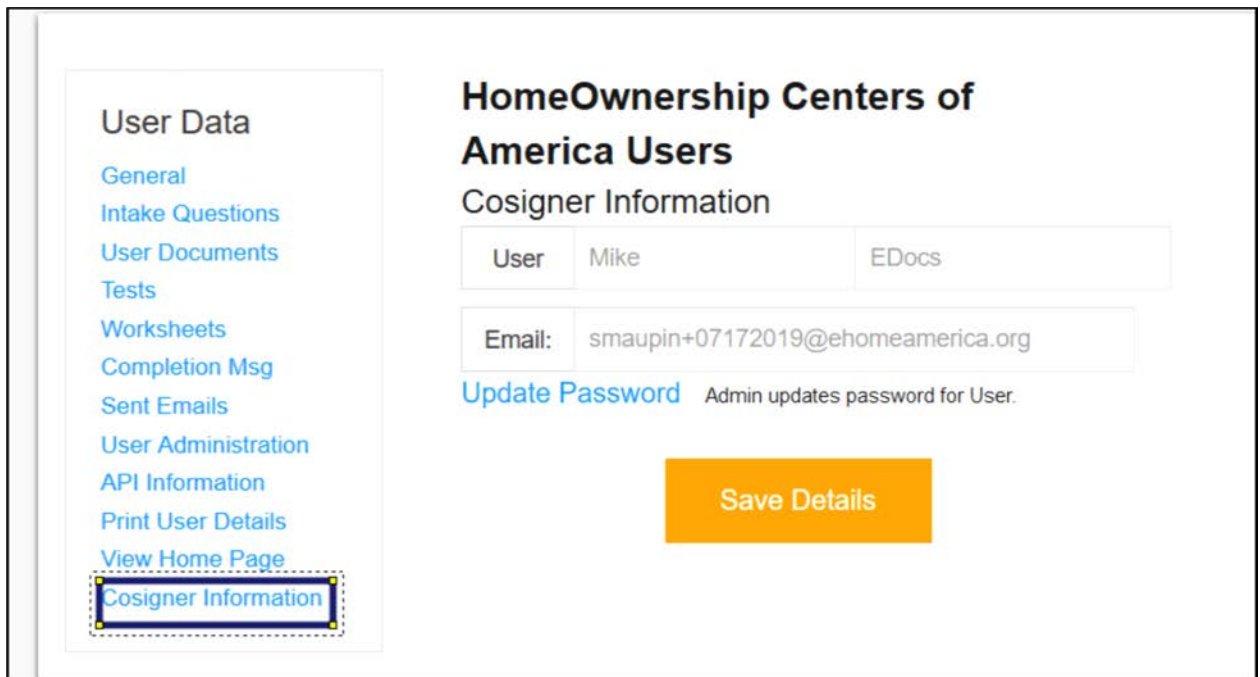
10. **Print User Details:** Is download in a PDF is all the information of the user.

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.

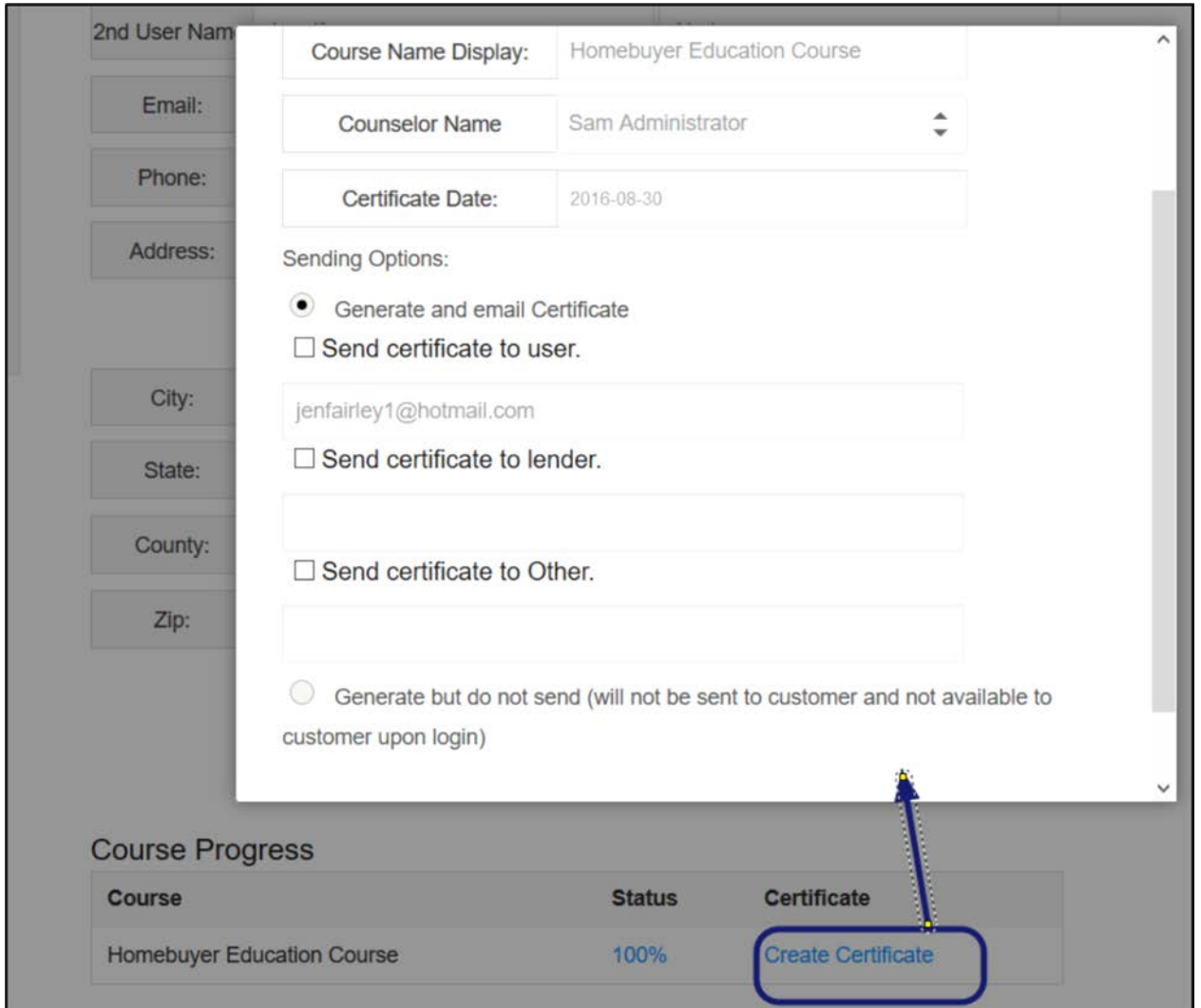


12. **Cosigner information:** You can view the Co-signer information and view the name and email address and update password. If the buyer has a co-signer only.



- **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 then 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](tel:844.24eHome). The eHome Support Team will be happy to assist!