



## Using the Hoozzi Admin Interface

To help you get the most out of the Hoozzi admin interface, we have included some user information below. This document should cover all common queries, but please don't hesitate to call our office on 02380 626280 if you have any issues.

### Logging In

You should have received a Hoozzi invite email from no-reply@hoozzi.com (check your Junk Mail if it's not in your Inbox). Click the link in this email to set your password and activate your Hoozzi admin account.

Once you have activated your Hoozzi admin account, use the instructions below to log in next time:

- Navigate to [www.hoozzi.com/admin](http://www.hoozzi.com/admin)
- Enter your email address and the password you registered when you were invited

### Permission Levels

Admin users are created at three permission levels:

- Developer level
- Division level (if applicable)
- Development level

Admin users can only view and edit information at their permission level, as explained below:

Ability on Hoozzi	Developer Admin User	Division Admin User	Development Admin User
<b>Invite a resident to Hoozzi by assigning an email address to a plot (essential for each plot)</b>	✓	✓	✓
<b>Edit communication and documentation details:</b> <ul style="list-style-type: none"><li>• Upload documents</li><li>• Update contact information</li><li>• Edit or add to the frequently asked questions</li><li>• Send notifications to residents' emails</li></ul>			
To an individual plot	✓	✓	✓
To a group of plots in a development	✓	✓	✓
To a phase of a development	✓	✓	✓
To an entire development	✓	✓	✓
To all developments within a division	✓	✓	
To all developments	✓		
<b>Invite a new Hoozzi admin user or edit existing users</b>			
Add or edit a Development admin user	✓	✓	✓
Add or edit a Division admin user (if applicable)	✓	✓	



## Inviting Residents

Classic Folios will send out a notification when all the plot information has been completed for a new batch of Hoozzi plots. For each plot, you or another admin login will need to input the residents' email to invite them to log in to their personalised portal.

To do this:

- Navigate to the development
- Click the Phase tab and select the correct phase
- Click on the plot
- Click the Residents tab and then click Add Resident
- Enter the resident's email address and name
- Input the resident's completion date (if known) – this completion date will trigger a series of helpful automated emails regarding moving house and settling in, sent to the resident in your company branding. Your residents have the option to unsubscribe from these emails when they activate their Hoozzi account
- Add any other details before clicking Submit

**Please note that the resident's Hoozzi invite email might be sent to their Junk Mail.**

## Edit a Resident's Details

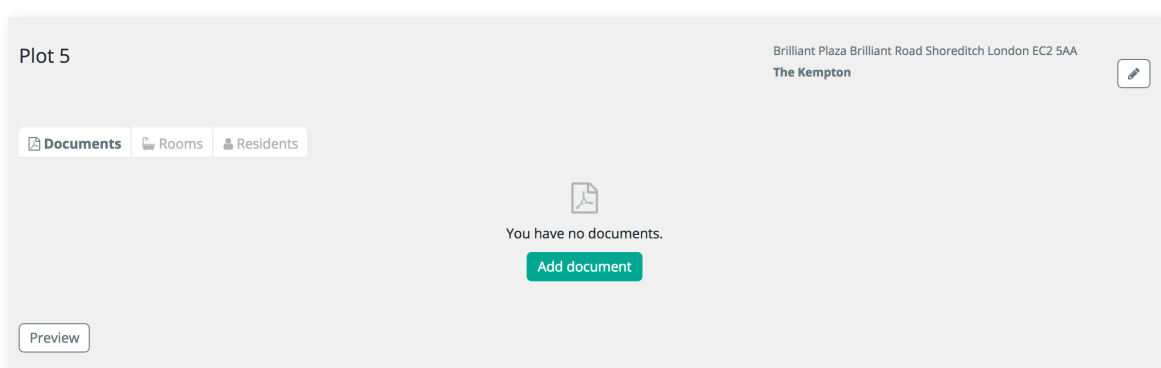
At any time, you can return to a plot and input the completion date (to trigger the automated emails mentioned above) or edit the resident's details:

- Navigate to the development
- Click the Phase tab and select the correct phase
- Click on the plot
- Click the Residents tab
- Click the Pencil icon and enter the new information

## Preview a Plot's Portal

If you wish to view the Hoozzi portal as the resident will see it, you can use the Preview function:

- Navigate to the development
- Click the Phase tab and select the correct phase
- Click on the plot
- Click the Preview button at the bottom left on the Documents tab (open by default)





## Upload Documents, Edit/Add Contacts and Edit/Add FAQs

At each permission level, you and the other admin users will be able to upload documents, edit/add contact details and edit/add FAQs. These options are laid out in tabs at each level.

### Developer Level

Documents and information at this level will be visible in all plots in all developments.

Dashboard > Developers > Brilliant Homes Demo

Developer level

Brilliant Homes Demo  
List id 530b3c536b

Edit Developer Docs, Contacts & FAQs

Divisions Developments Documents Contacts FAQs Styling

Division name	Last edited
Brilliant Division	23.06.2017

Go to Developments (If no Division)

Go to Division (If applicable)

### Division Level (if applicable)

Documents and information at this level will be visible in all plots within a division/region of your company (if applicable to your company), e.g., Southern region developments.

Dashboard > Developers > Brilliant Homes Demo > Brilliant Division

Division level (If applicable)

Brilliant Division  
List id 4c8d4db3c1

Edit Division Docs, Contacts & FAQs

Developments Documents Contacts FAQs Styling

Development name	Last edited
Brilliant Plaza	04.04.2017

Go to Development

### Development Level

Documents and information at this level will be visible in all plots on that development.

WpooZzi

Dashboard > Developers > Brilliant Homes Demo > Brilliant Division > Brilliant Plaza

If Development is within a Division

Brilliant Plaza

Segment id: (not configured)  
Documents from all residents: 0

Edit Development Docs, FAQs & Contacts


Unit types | Phases | Plots | Documents | FAQs | Contacts | Videos

Unit type name	Last edited
The Kempton	17.07.2017
Unit type test	21.06.2017

Go to plot documents (individual plots)

### Plot Documents (individual plot)


To add or edit documents assigned to a plot, go to the development, select the phase and then click on the plot.



[Dashboard](#) > [Developers](#) > [Brilliant Homes Demo](#) > [Brilliant Division](#) > [Brilliant Plaza](#) > **Phase 1**

## Phase 1

Brilliant Plaza Brilliant Road Shoreditch London EC2 5AA

Phase 1


Plots

Plot documents

Documents

Plot



Last edited

Unit type

Plot 1.0


10.07.2017

The Kempton

+ Add plot

Documents listed here are visible only on that individual plot's Hoozzi portal.



[Dashboard](#) > [Developers](#) > [Brilliant Homes Demo](#) > [Brilliant Division](#) > [Brilliant Plaza](#) > [Phase 1](#) > [Plots](#) > **Plot 1.0**

Plot 1.0

Brilliant Plaza Brilliant Road Shoreditch London EC2 SAA  
**The Kempton**

Documents

Rooms

Residents

+ Add document

Document name	Size	Last edited
Boiler Quick Start Guide	469701	10.07.2017
Energy Performance Certificate	469701	10.07.2017



## Notifications

In the left hand menu, click Notifications to view a list of all the notifications that have recently been sent.

To send a new Notification:

- Click Send Notification in the top right
- Use the drop-down menus and text boxes to choose who receives your message
- **Plot prefix:** To send a message to an individual plot or group of plots, you will need to input a plot prefix, as well as the plot number(s). The plot prefix is the word/number that precedes the plot number and is separated by a space. This will usually be the word "Plot", but please check the list of plots on the development for confirmation
- To send to one plot or many plots, enter the plot prefix into the Plot prefix text box, then add the plot number(s) into the Add Plots by List box. If sending to multiple plots, separating the plot numbers with commas
- To send to a range of plots, enter the plot prefix into the Plot prefix text box, then enter the first and last plot numbers into the Add plots by range text boxes

A screenshot of the Hoozzi notification form. At the top, there is a checkbox labeled 'Send to all 42 homeowners'. Below this, a section titled 'Send to all homeowners under:' contains several dropdown menus for 'Developer', 'Division', 'Development', and 'Phase'. Each dropdown has a 'Choose...' placeholder. Below these is a 'Plot prefix' text box. Then, there are two options for adding plots: 'Add plots by range' with 'Range from' and 'Range to' text boxes, and 'Add Plots by List' with a large text box. At the bottom, a note states 'Separated by commas e.g. '1,2,5,10,15' or '2.3, 2.4, 2.6''.

- After choosing the plots that will receive your message, enter a subject and the content of your message using the boxes on the right
- After you click Submit, all registered residents will receive a notification email, which will link them back to their Hoozzi portal



## Inviting Admin Users

In the left hand menu, click Users to view a list of all the admin users that have been invited at your permission level and the level(s) below you.

To invite a new admin user:

- Click Add User to invite a colleague to become a user of the Hoozzi admin interface
- Enter their name and email
- Use the Role drop-down menu to select the permissions level for the admin user. Admin users can only invite other admin users to join at the same permissions level as them or at one of the levels below:
  - Developer admin – can view, edit and upload documents at any level seen by all plots on all developments and edit any individual information for any plot on any development
  - Division admin – can make changes to plots on any development within that division
  - Development admin – can only edit plots or development information for that specific development

**Please note that the admin user's Hoozzi invite email might be sent to their Junk Mail.**

**It might be worth sending the admin user an email with this user guide attached, so they know how to use the Hoozzi admin interface.**

A screenshot of the Hoozzi web application's 'Add admin user' form. The page has a light gray background. At the top left is the Hoozzi logo. At the top right is a search bar with a magnifying glass icon and the text 'Search'. Below the logo is a breadcrumb trail: 'Dashboard > Admin users > Add admin user'. The main content area is titled 'Add user' with a person icon. It contains three white form boxes. The first box is for 'Email address' with a 'Required' label. The second box is for 'First name', 'Last name', and 'Job title', each with its own input field. The third box is for 'Picture' with a 'Choose file' button and the text 'No file chosen'. Below these boxes is a 'Role' dropdown menu with 'Choose...' selected and a 'Required' label. At the bottom left is a 'Back' button, and at the bottom right is a green 'Submit' button.