



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
- 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
Invite a resident to Hoozzi by assigning an email address to a plot (essential for each plot)	✓	✓	✓
Edit communication and documentation details:			
• Upload documents			
• Update contact information			
• Edit or add to the frequently asked questions			
• Send notifications to residents' emails			
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	✓		
Invite a new Hoozzi admin user or edit existing users			
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)

A screenshot of the Hoozzi portal interface. At the top, it says "Plot 5". On the right, there is property information: "Brilliant Plaza Brilliant Road Shoreditch London EC2 5AA" and "The Kempton" with a pencil icon for editing. Below this is a navigation bar with tabs: "Documents" (which is selected and highlighted in blue), "Rooms", and "Residents". The main content area shows a message: "You have no documents." with a small document icon. A green button labeled "Add document" is visible. At the bottom left, there is a "Preview" button.



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.

The screenshot shows the Woozzi interface at the developer level. At the top, the navigation bar includes 'Dashboard', 'Developers', and 'Brilliant Homes Demo'. Below this, a red bracket labeled 'Developer level' spans from the navigation bar down to the development details section. The development details section contains the title 'Brilliant Homes Demo' and 'List id 530b3c536b'. A red bracket labeled 'Edit Developer Docs, Contacts & FAQs' points to the 'Edit' link in the 'Edit Developer Docs, Contacts & FAQs' row. The navigation bar below the details section includes 'Divisions', 'Developments', 'Documents', 'Contacts', 'FAQs', and 'Styling'. A dropdown menu for 'Division name' is open, with a red bracket pointing to it and the text 'Go to Developments (If no Division)'. To the right, a 'Last edited' field shows '23.06.2017'. A red bracket labeled 'Go to Division (If applicable)' points to the 'Brilliant Division' entry in the list.

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.

The screenshot shows the Woozzi interface at the division level. At the top, the navigation bar includes 'Dashboard', 'Developers', 'Brilliant Homes Demo', and 'Brilliant Division'. Below this, a red bracket labeled 'Division level (If applicable)' spans from the navigation bar down to the division details section. The division details section contains the title 'Brilliant Division' and 'List id 4c8d4db3c1'. A red bracket labeled 'Edit Division Docs, Contacts & FAQs' points to the 'Edit' link in the 'Edit Division Docs, Contacts & FAQs' row. The navigation bar below the details section includes 'Developments', 'Documents', 'Contacts', 'FAQs', and 'Styling'. A dropdown menu for 'Development name' is open, with a red bracket pointing to it and the text 'Go to Development'. To the right, a 'Last edited' field shows '04.04.2017'. A red bracket labeled 'Go to Development' points to the 'Brilliant Plaza' entry in the list.



Development Level

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

The screenshot shows the Hoozzi interface for the 'Brilliant Plaza' development. At the top, there's a breadcrumb navigation: Dashboard > Developers > Brilliant Homes Demo > Brilliant Division > Brilliant Plaza. To the right of the breadcrumb, the text 'If Development is within a Division' is displayed. Below the breadcrumb, the text 'Development level' is highlighted with a red bracket. The main content area is titled 'Edit Development Docs, FAQs & Contacts'. A sub-section titled 'Brilliant Plaza' shows a table with two rows of data:

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

A red bracket on the left side of the table points to the 'Unit type name' column header, and another red bracket on the right side points to the 'Last edited' column header. A red callout box labeled 'Go to plot documents (individual plots)' points to the first row of the table.

The screenshot shows the Hoozzi interface for the 'Brilliant Towers' development. The breadcrumb navigation is identical to the previous screenshot: Dashboard > Developers > Brilliant Homes Demo > Brilliant Division > Brilliant Plaza. To the right of the breadcrumb, the text 'If Development isn't within a Division' is displayed. The main content area is titled 'Plot Documents (individual plot)'.

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.

The screenshot shows the Hoozzi interface for the 'Phase 1' of the 'Brilliant Plaza' development. The breadcrumb navigation is: Dashboard > Developers > Brilliant Homes Demo > Brilliant Division > Brilliant Plaza > Phase 1. The main content area is titled 'Phase 1' and shows a table of plots:

Plot	Last edited	Unit type	Actions
Plot 1.0	10.07.2017	The Kempton	

A red callout box labeled '+ Add plot' is located in the top right corner of the table area.

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

The screenshot shows the Hoozzi interface for the 'Plot 1.0' of the 'The Kempton' unit type. The breadcrumb navigation is: Dashboard > Developers > Brilliant Homes Demo > Brilliant Division > Brilliant Plaza > Phase 1 > Plots > Plot 1.0. The main content area is titled 'Plot 1.0' and shows a table of documents:

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

A red callout box labeled '+ Add document' is located in the top right corner of the table area.



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 a web-based notification sending interface. At the top, there is a checkbox labeled "Send to all 42 homeowners". Below it, a section titled "Send to all homeowners under:" contains four dropdown menus: "Developer" (with an option to "Choose..."), "Division", "Development", and "Phase". Further down, there is a "Plot prefix" input field. Below that, sections for "Add plots by range" and "Add Plots by List" are shown, each with two input fields: "Range from" and "Range to" for the former, and a large text area for the latter. A note at the bottom of this section says "Separated by commas e.g. '1,2,5,10,15' or '2.3, 2.4, 2.6'".

Send to all 42 homeowners

Send to all homeowners under:

Developer
Choose...

Division

Development

Phase

Plot prefix

Add plots by range

Range from

Range to

Add Plots by List

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 'Add admin user' form. The page has a header with the Hoozzi logo and a search bar. Below the header, a breadcrumb navigation shows 'Dashboard > Admin users > Add admin user'. The main content area is titled 'Add user' with a 'User' icon. There are three main input sections: 1) 'Email address' (Required), 2) 'First name', 'Last name', 'Job title', and 'Role' (with a dropdown menu showing 'Choose...'), and 3) 'Picture' (with a 'Choose file' button and a message 'No file chosen'). At the bottom are 'Back' and 'Submit' buttons.