

## THDA HBE Calendar Instructions

We have already created your system account. Your login name and password have been provided to you separately. The system sends me a message each time you enter a new class so you don't have to send me a message when you do your entries. The system notifies me for you – then I go in as soon as I can and do the review and approvals! The system will then send you the message after I've completed the approval. If there is a question, then I'll note that and the system will send an "action deferred" message telling you what you need to do to correct the entry.

1. Go to the THDA homepage at [www.thda.org](http://www.thda.org)
2. Mouse over the "Homeownership" link at the top of the home page.
3. In the drop down list under the "Homeownership" link, mouse over the "Homebuyer Education" link.
4. Click on the "Homebuyer Education Class Schedule" link directly to the right of the Homebuyer Education link.
5. Displayed will be the general HBEI calendar, containing all HBE events. At the top of the right side of the calendar is the word Login. Click on that word to bring up the login screen. Enter your assigned username and password.
6. Upon successful login, you will see the following:

### To get started, what do you want to do?



Add an event.



View my calendars.



Approve events.



Change my preferences.



Watch tutorials.



Logout

### System Messages

Welcome User

7. **Add An Event** is the option to select for adding your classes to the calendar. After this selection you will see the following screen:

## Edit Calendar Event -

General	Description	Recurrence	Exceptions
<b>Calendar</b>	HBEI Training Schedule		<b>Item Style</b> Default
<b>Title</b>			
<b>Approved</b>	<input type="checkbox"/> <b>Event Type</b> Homebuyer Education: Pre-purchase	<b>Privacy</b>	None
<b>Contact Name</b>	Verdell Martin		
<b>Contact Info</b>	verdell41@bellsouth.net		
<b>Add. Info URL</b>			
<b>Starting Date</b>	X	<b>Start Time</b>	X
<b>End Date</b>		<b>End Time</b>	

	X		X	
	<input type="text"/>		<input type="text"/>	<input type="text"/>
	<input type="text"/>			

8. **IMPORTANT:** The field marked **Title** is actually the city in which the class is to be held. It is imperative that enter only the name of the city there. This is the identifying data that appears on the calendar, and it is used when searching for classes in specific locations.
9. You will note the name of your organization and your email address are automatically filled in for you. If you need to change the email address, you may do that. Leave **Privacy** set to **None**. If you have a website where prospective students can go to receive additional information, you may include it, or if not, you can simply leave that field blank.
10. Enter the date of the training either by typing it in or use the pop-up calendar. The ending date (which is usually the same), must also be entered. Use the drop down lists to select start and end times.
11. The type of training provided for this event is selected by the drop down list for **Event Type**. The available categories are:

The screenshot shows a portion of a web form. At the top left, there is a dropdown menu labeled 'ing Schedule'. To its right is a button labeled 'Item Style'. Below these, there is a section for 'Event Type' with a dropdown menu currently showing 'Homebuyer Education: Pre-purchase'. The dropdown menu is open, displaying a list of options: 'Fair Housing', 'Financial Management', 'Foreclosure Seminars', 'Holiday', 'Homebuyer Education: Pre-purchase' (highlighted in blue), 'Maintenance Workshop', 'Money Smart', and 'Post Purchase'. To the right of the 'Event Type' dropdown is a section labeled 'Privacy' with several input fields. Below the 'Event Type' dropdown is a section labeled 'End Time' with several input fields.

Select the correct type of training. **Homebuyer Education: Pre-Purchase** is currently the default choice, but you may select any of the others, as appropriate. You are now done with the first data entry screen.

12. Next is the **Description** tab. This is the text field into which you should enter information about the specific training event. In this field include the street address where the training is to take place, the trainer's name and contact phone number. What you put here will be displayed to prospective students when they view the details of that specific class.

13. When posting classes, please make sure all of the following items are addressed. To provide the additional information, click on the description tab.
14. 1. Location of class with address
15. 2. Phone number for contact
16. 3. Cost of class (note: all THDA homebuyers must be reimbursed for any cost over \$25)
17. 4. Method to register for class: note that all customers must pre-register.
18. 5. If one class is not the full 8 hours, provide details on the number of classes the homebuyer will need to attend. Also note whether any one-on-one time is included as part of the 8 hour service.
19. Please remember to put only the city name in the **Title** box. The title is what appears on the calendar page. We use city for each homebuyer to be able to pick a class in the area.