HOMESCHOOL-LIFE.com

Overview – An introduction to some of the core features of your website

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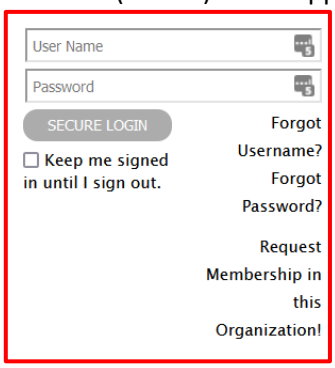
I. WEBSITE TOUR

Homeschool-Life provides you with three websites, each with higher levels of security:

1) Public Site – No password needed

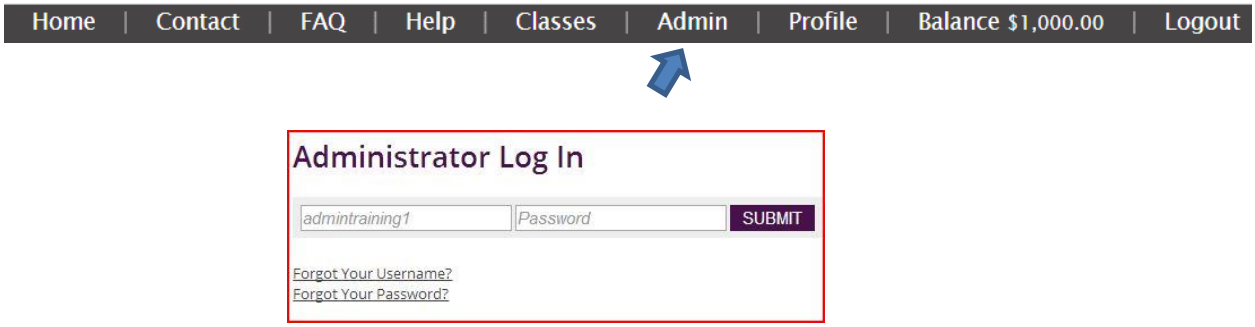
2) Member (secure) Site – Approved Members Login with a user name and password



3) Group Admin Site

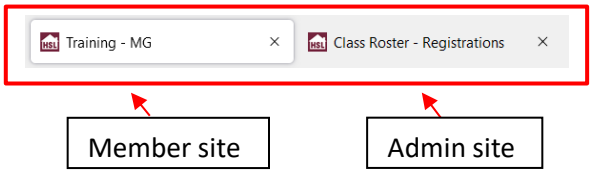
Only members whom you select to be website administrators will have an additional Login and Password for the Group Admin Site.

Select **Group Admin Site** from the Top Navigation Bar once you log into the family member site:



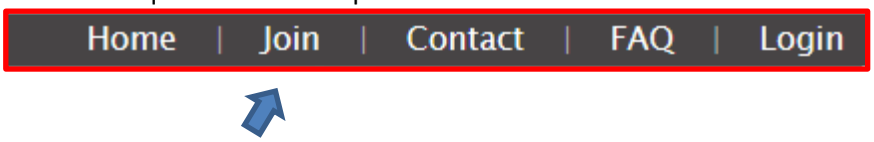
4) Open Multiple Sites when Updating

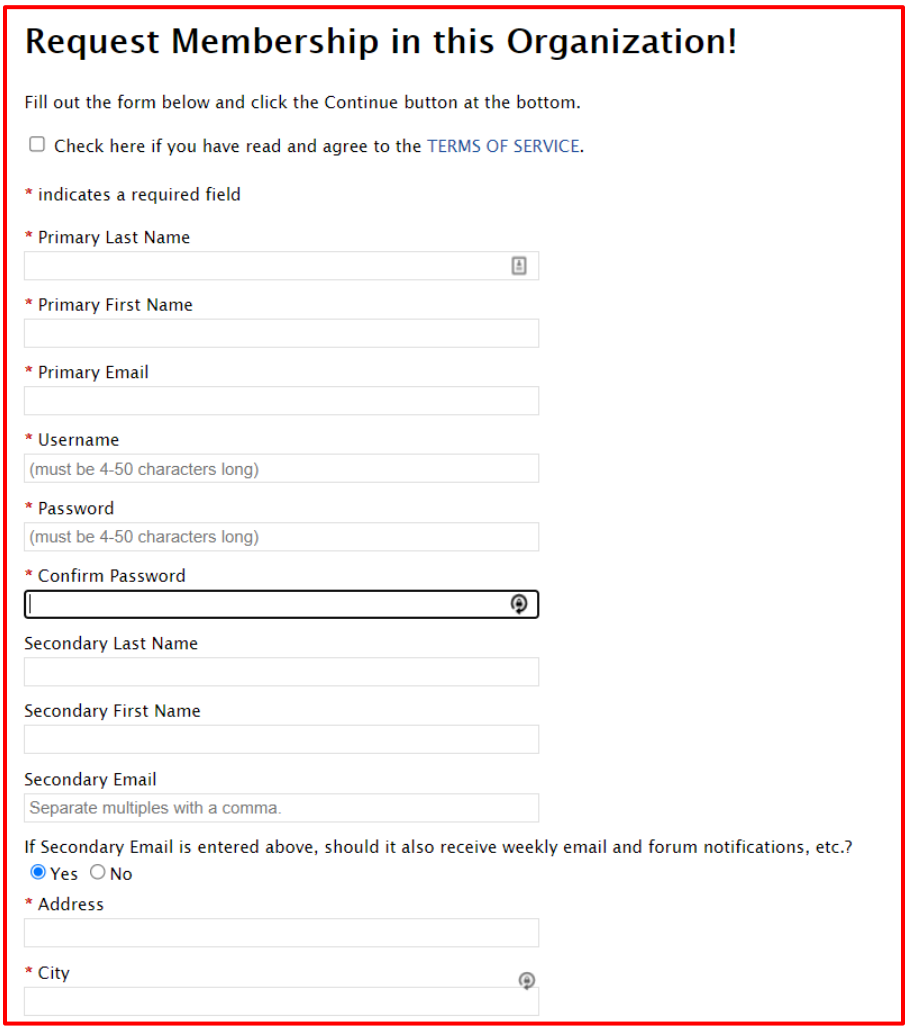
Website Administrators may want to open both an admin site and a member site simultaneously when updating your website. This will enable you to make changes on the admin site and, after clicking refresh, see the changes on the member site.



OVERVIEW – How it all works…

1) PUBLIC: Request Membership

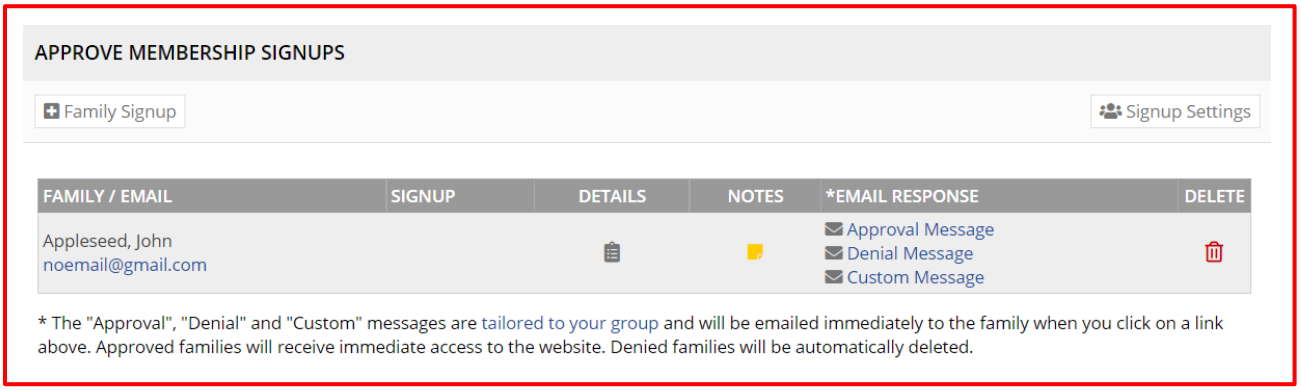




This Request Membership form is customizable under

- Admin Site >Members
  >Families
  >Registration Process

2) Administrator Approves or Deletes Request
   - Admin Site >Approval
     >Membership Signups

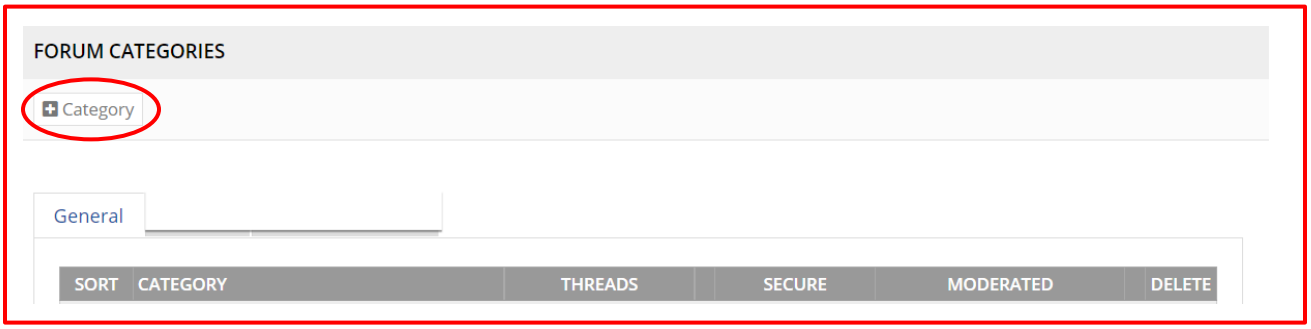


3) Administrators can Import a Group of Members from an Excel Spreadsheet
   - Admin Site >Members
     >Families
     >Import

NOTE: The Excel Spreadsheet must follow the online Sample Template

II. FORUM (Group Communication Tool)

1) Create Categories
   - Admin Site >Forum
     >Category List



2) Set Members' Receiving Ability
   - Admin Site >Forum
     >Settings

FORUM SETTINGS

☐ Sort Forum Posts in Ascending Chronological Order
☑ Enable Email Direct to Forum Feature
Deletion Schedule
90 days from last post date

Families' Forum Email Receiving Ability

◉ Show, allow families to change their Forum Email delivery settings.
○ Hide, do NOT allow families to change their Forum Email delivery settings.
◉ Yes, allow families to select which forum categories they want to receive email notifications from.
☐ Click here to override any existing category selections by families and default all families to receive all categories they have permission to view (as long as the family has notifications turned on).
○ No, do **NOT** allow families to select which forum categories they want to receive email notifications from. They will automatically receive all notifications if they have the Forum Notification(s) option turned on.

Disclaimer Message

Source

Default is set to permit members to select the forum categories they wish to receive. To see this on the member site:

- Member Site >Profile (Top Navigation Bar)

Home | Contact | FAQ | Help | Classes | Admin | Profile | Balance $850.00 | Logout

Forum Emails:
* Would you like to receive forum notifications via email (not just the ones you create)?
◉ Yes ○ No

Many Emails: Would you like to receive notifications IMMEDIATELY?
◉ Yes ○ No

Delivery Type:
◉ Whole Thread ○ New Part Only

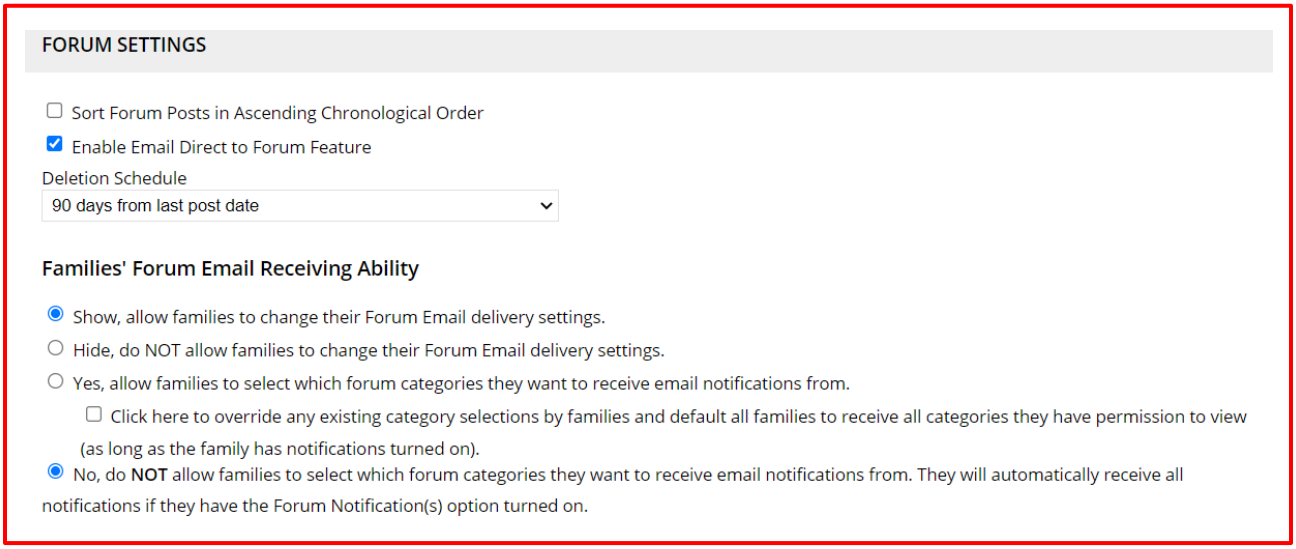
Daily Digest: Would you like to receive notifications ONCE A DAY?
○ Yes ◉ No

Which forum categories you would like to be notified about?
☑ Adventures in Reading (Class)
☑ General
☑ General
☑ Graduation
☑ Holidays
☑ Chemistry (Class)
☑ Honor's Society

When Members' Receiving Ability is set to YES, Members can select and deselect categories here, found under Edit My Profile.

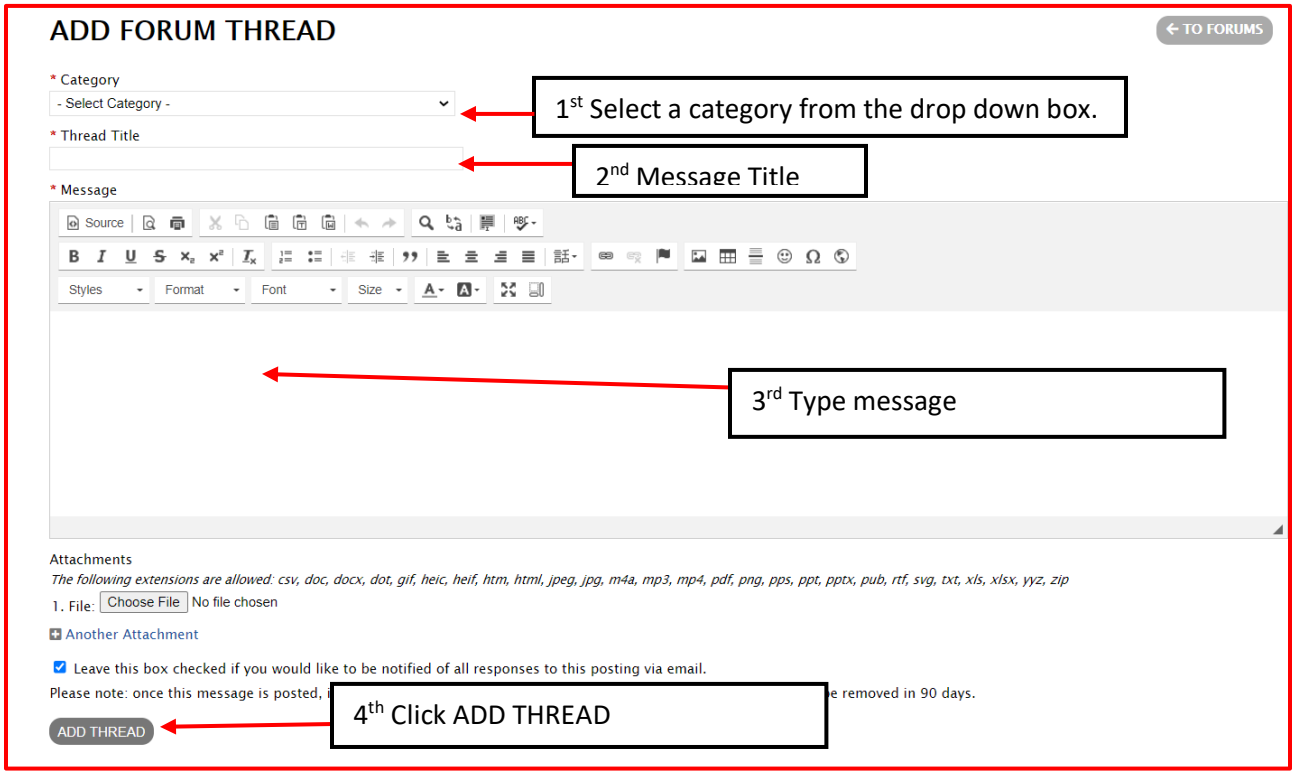
If you wish to change this setting,

- Admin Site >Forum
  >Settings



3) How to send a Forum Message

- Member Site > Forum
  > +New Thread

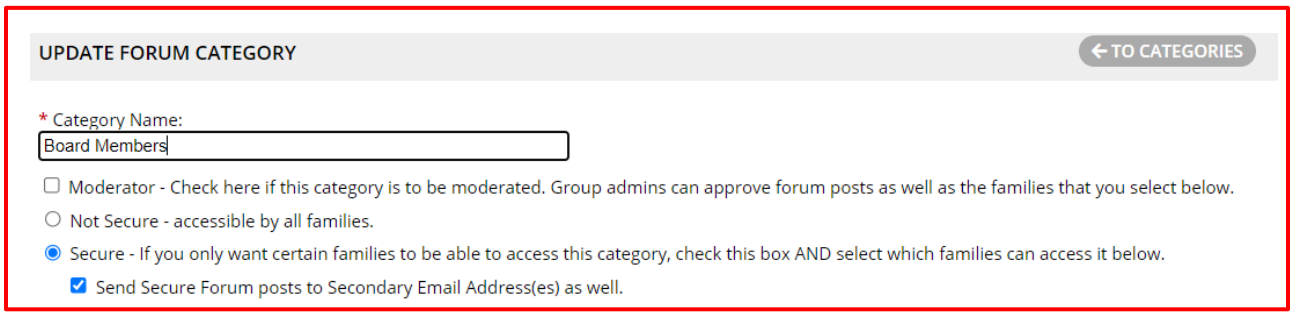


4) Secure Forums (Boards members, Graduating Class, etc.)

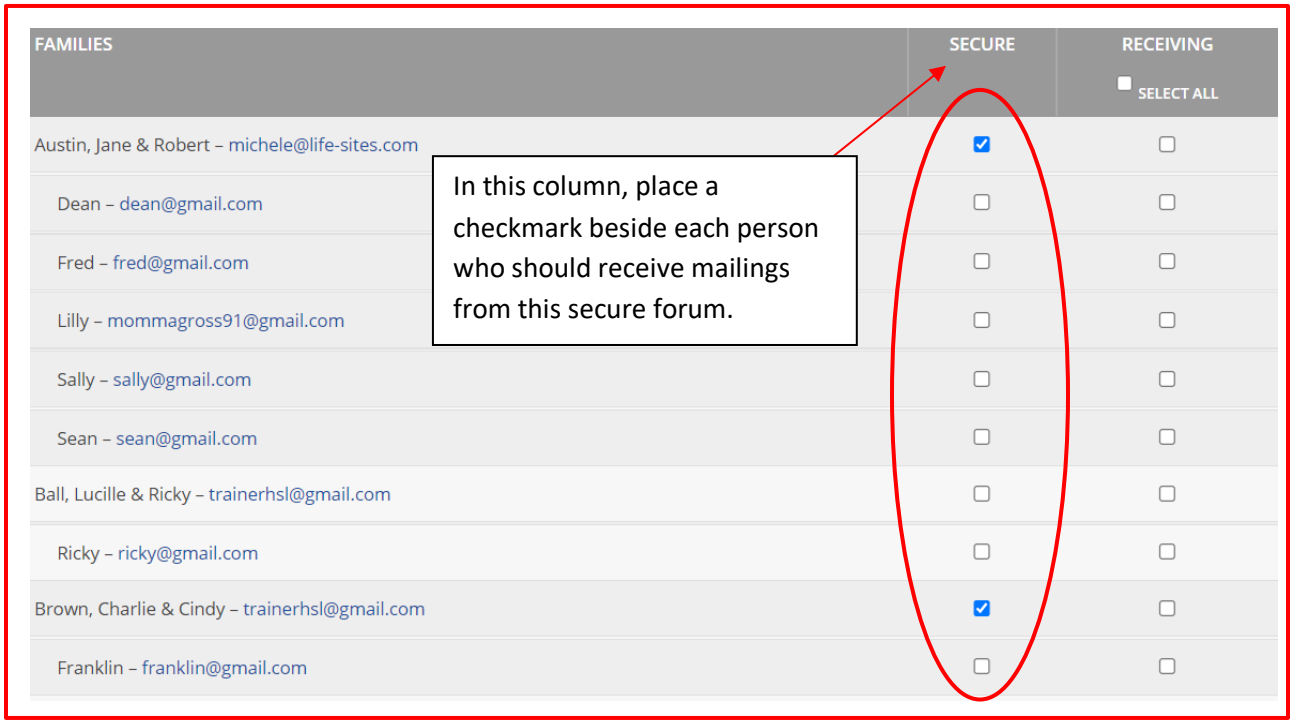
Website Administrators can set up custom forums targeting specialized groups, to streamline communications to the people who need the information and eliminate excessive emails to your other members.

- Admin Site - >Forum
  >Category List

Select the Forum you wish to make secure by clicking on it and placing a checkmark in the box beside "Secure."



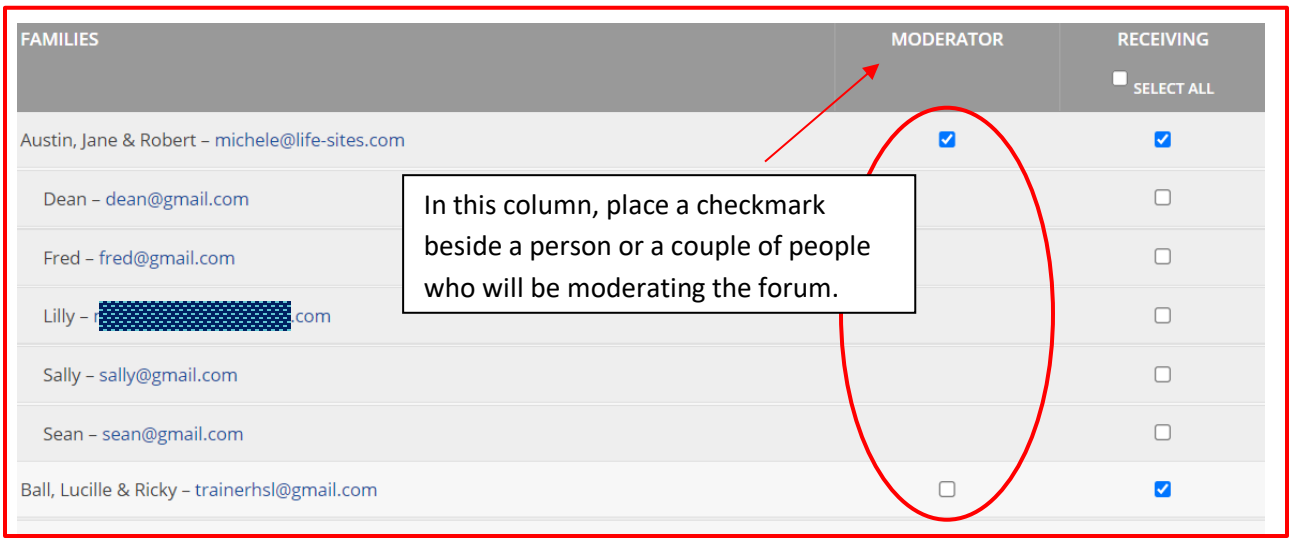
AND select the Families you wish to include in the secure forum mailings:



5) Moderated Forums (Summer Activities, for example)

- Site Admin >Forum
  >Category List

Select the Forum you wish to make secure by clicking on it and placing a checkmark in the box beside "Moderated."



6) Email Direct

- Admin Site

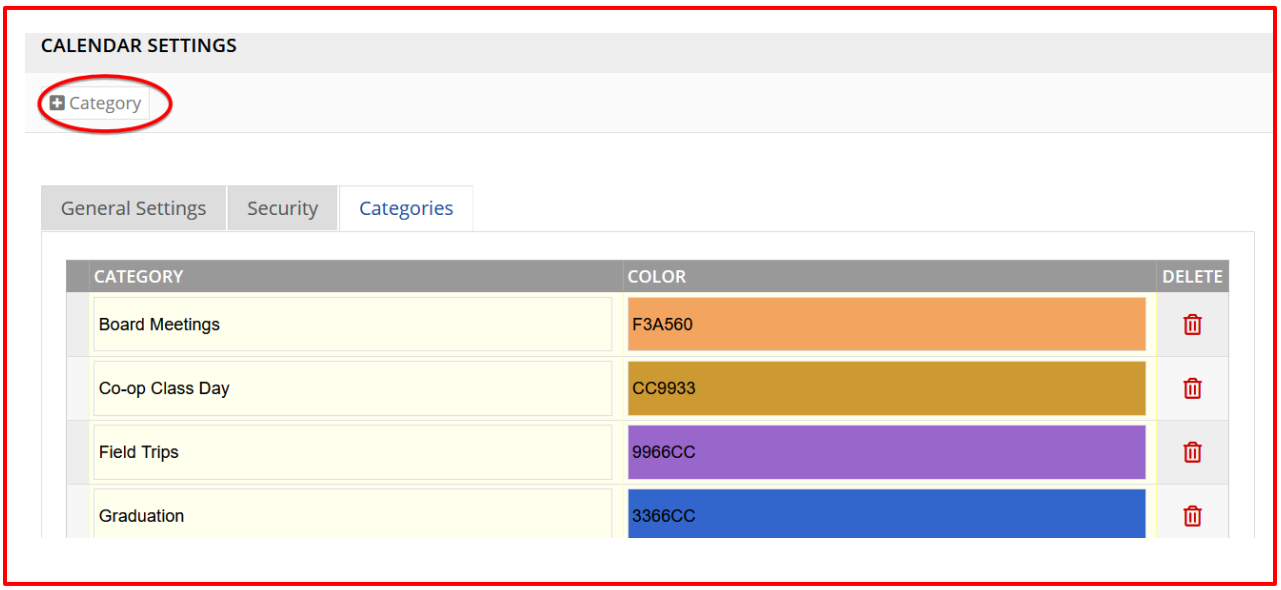
Scroll to bottom of home page under **ADMIN CORNER**. Email Direct is a toggle switch. Click to turn on/click again to turn off. Turning email direct on makes it possible for members to email a forum message to forums@homeschool-life.com. An email will return to the sender, prompting them to select a category. After the category is selected, the message is posted to the forum.

NOTE:

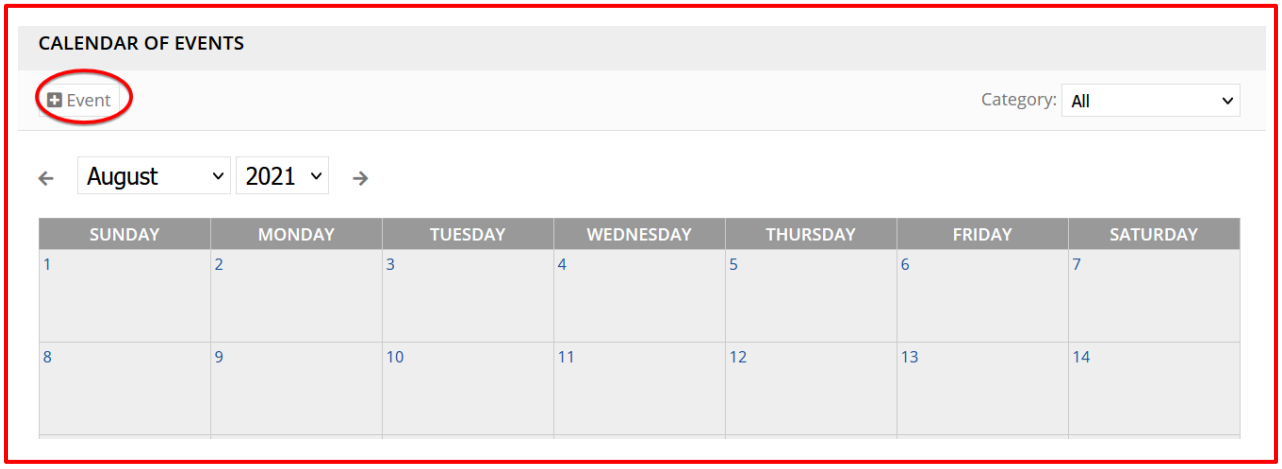
- When Email Direct is ENABLED- If a family clicks "Reply" to a forum message, it will reply to forums@homeschool-life.com.
- When Email Direct is DISABLED- If a family clicks "Reply" to a forum message it will reply to the last person who posted to that thread.

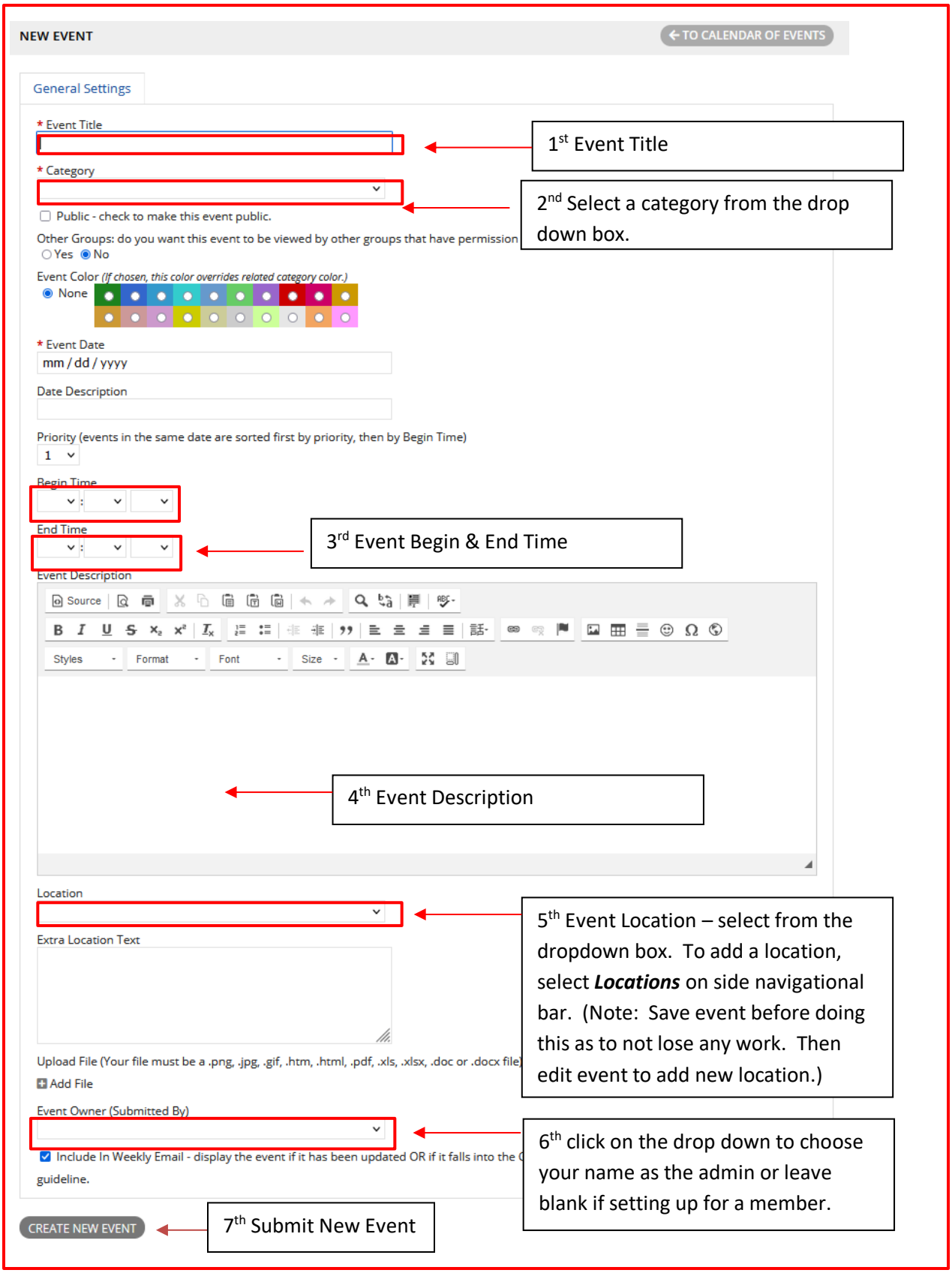
III. CALENDAR

1) Create Categories
   - Admin Site >Settings
     >Categories Tab
     > +Category

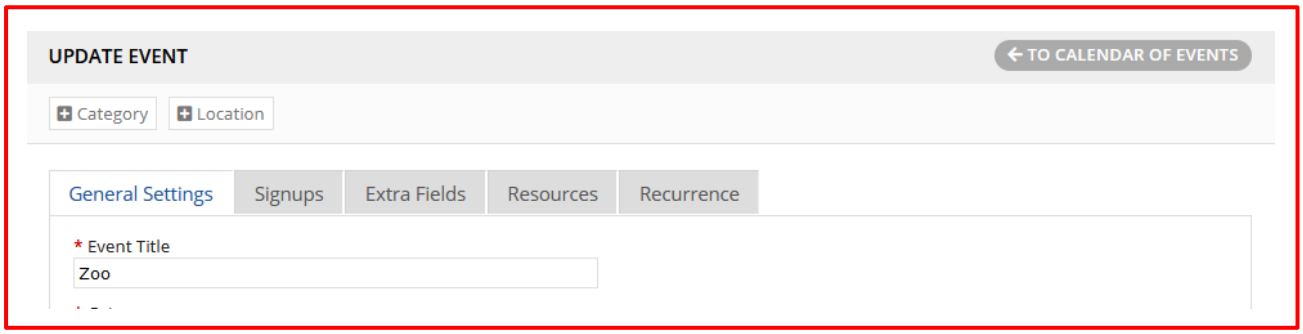


2) Create a Calendar Event
   - Admin Site >Calendar
     > +Event

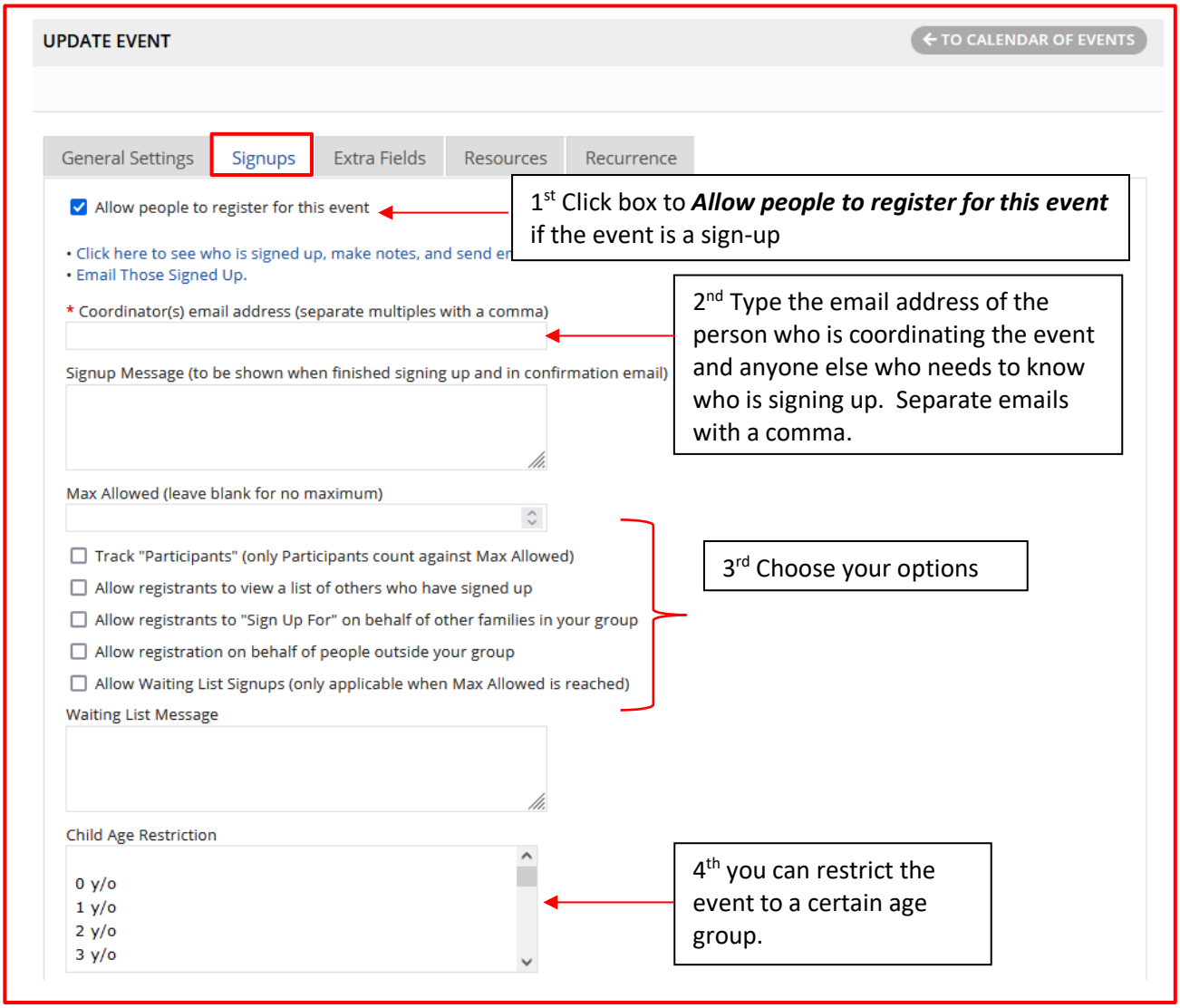


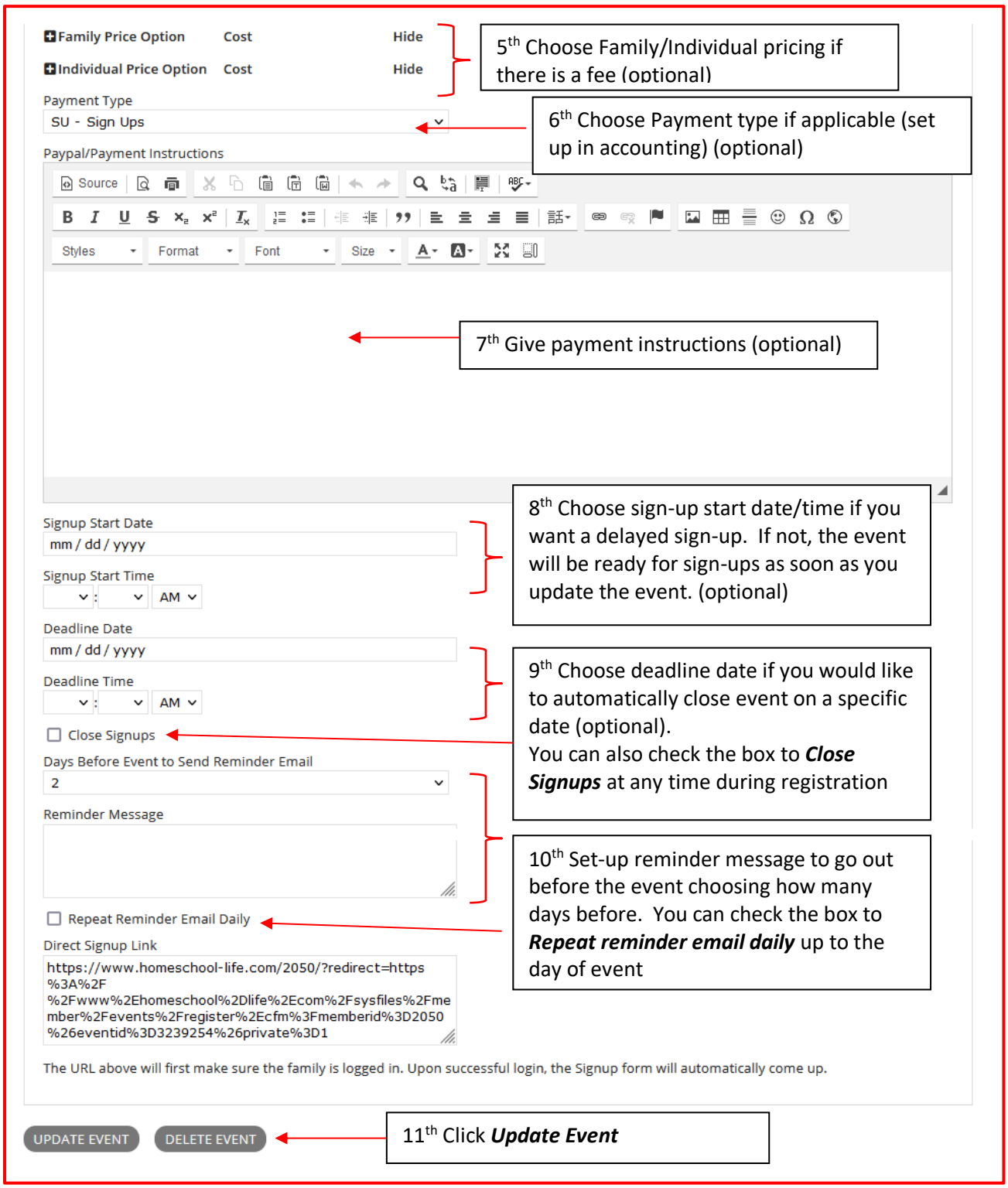


3) Once you add an event, the event edit page will open with several tabs. Edit each tab as needed to complete the event.

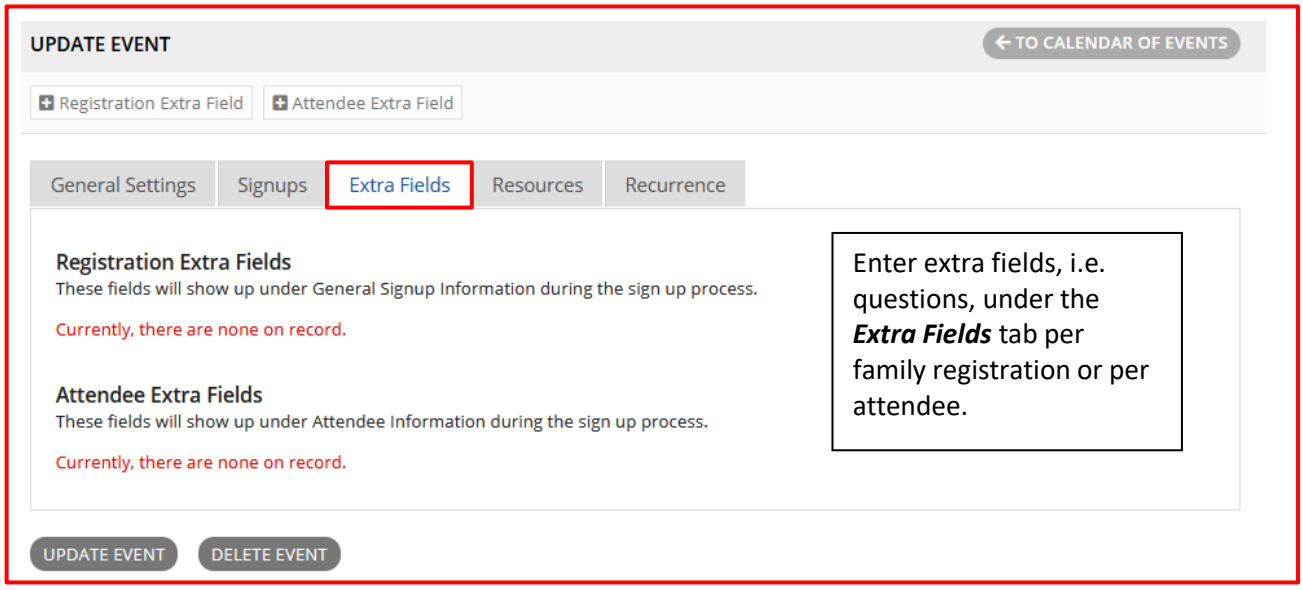


- Signups Tab



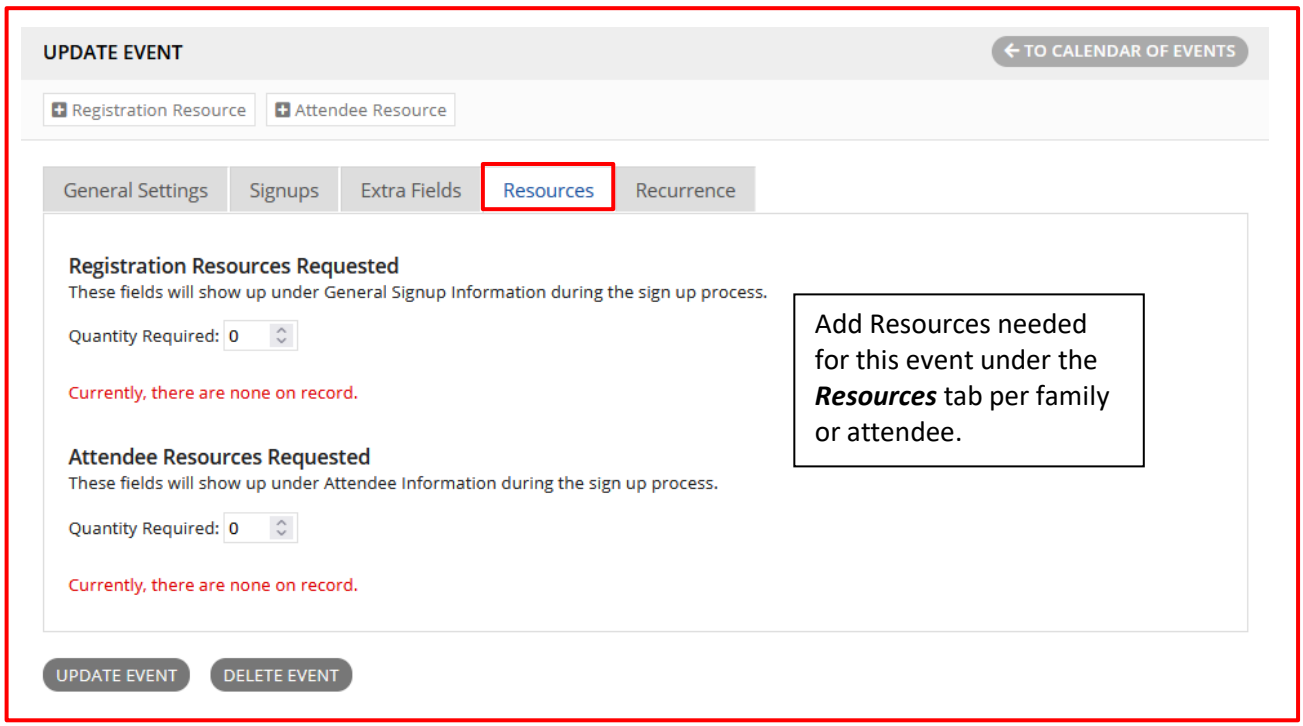


- Extra Fields Tab



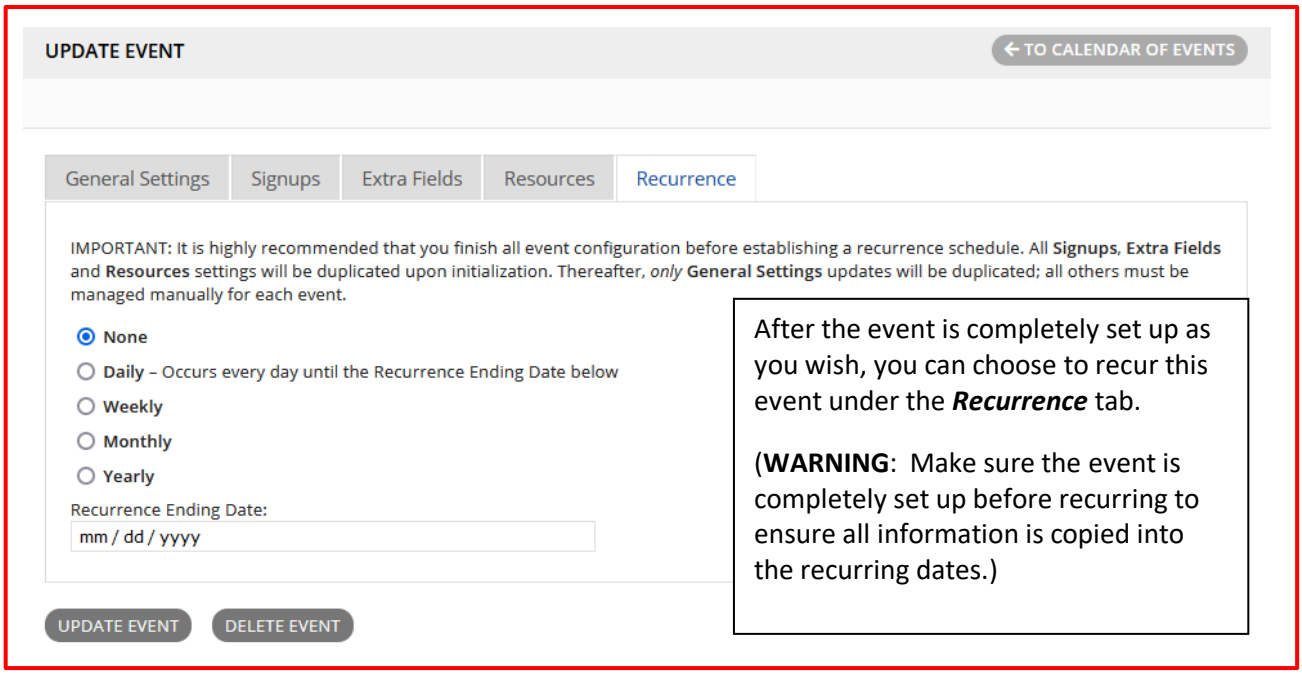
Enter extra fields, i.e. questions, under the ***Extra Fields*** tab per family registration or per attendee.

- Resources Tab



Add Resources needed for this event under the ***Resources*** tab per family or attendee.

- Recurrence Tab

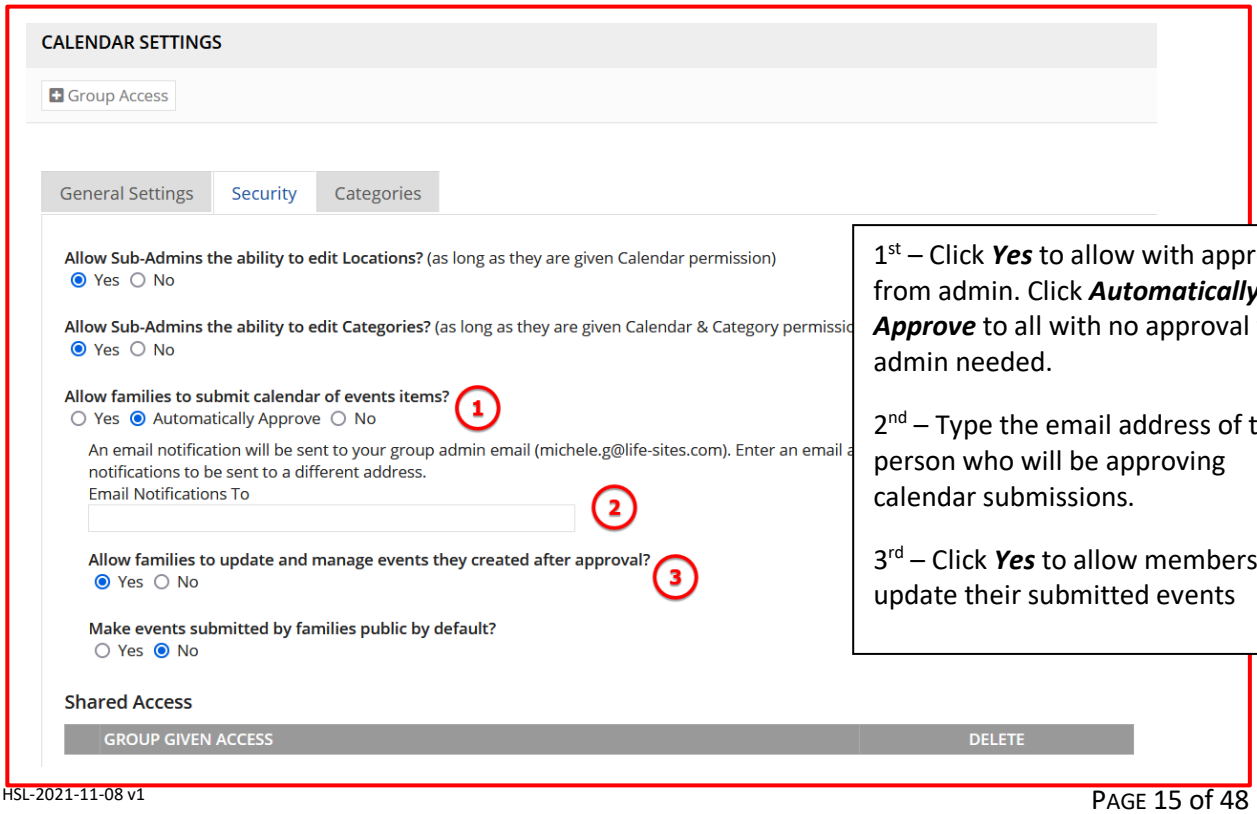


After the event is completely set up as you wish, you can choose to recur this event under the ***Recurrence*** tab.

(**WARNING**: Make sure the event is completely set up before recurring to ensure all information is copied into the recurring dates.)

4) How to allow families to submit calendar events

- Admin Site >Calendar >Settings >Security Tab



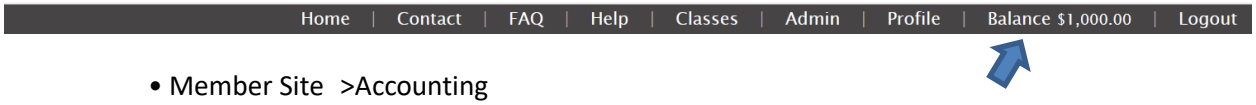
1st – Click ***Yes*** to allow with approval from admin. Click ***Automatically Approve*** to all with no approval from admin needed.

2nd – Type the email address of the person who will be approving calendar submissions.

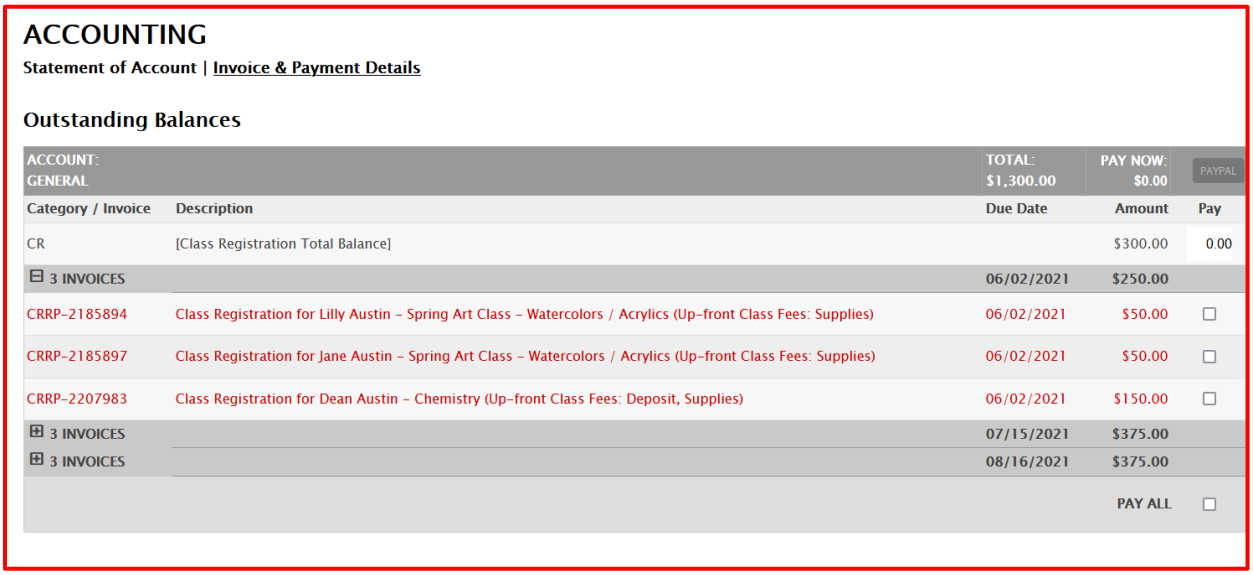
3rd – Click ***Yes*** to allow members to update their submitted events

IV. ACCOUNTING

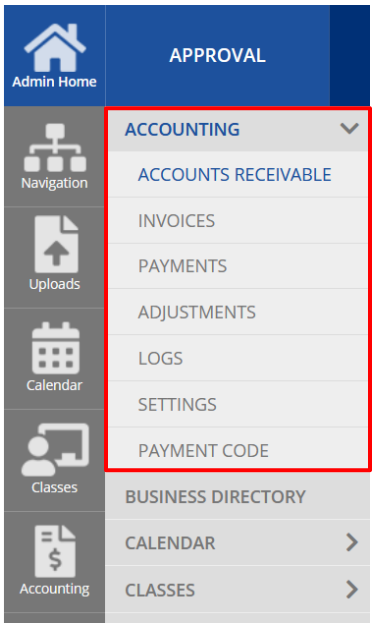
1) Check Outstanding Balances



- Member Site >Accounting



2) Options on the Admin Site



Accounts Receivable - Listed by MEMBER. Admins can edit, print, email, makes notes, send invoices, record payments, make adjustments, and download to an Excel spreadsheet.

Invoices - Listed by INVOICE. Admins can print, edit, delete, add an invoice, filter, and download to an Excel spreadsheet

Payments - Listed by PAYMENTS. Admins can print, edit, delete, add a payment, filter, and download to an Excel spreadsheet.

Adjustments - Listed by ADJUSTMENTS. Admins can print, edit, delete, add an adjustment, filter, and download to an Excel spreadsheet.

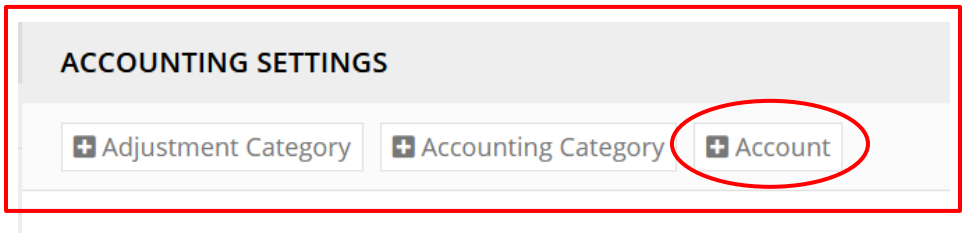
Logs – View a log of activity by administrator.

Settings - Accounting Categories, Adjustment Categories, PayPal Accounts, and Fiscal Year.

Payment Code – Generate a payment code here.

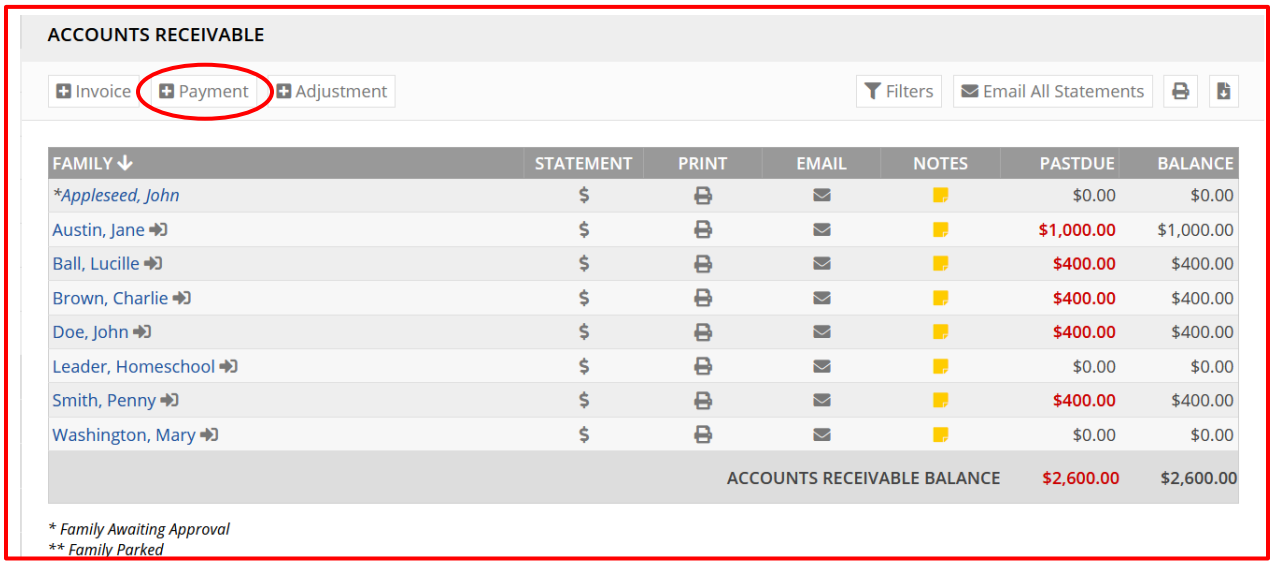
3) How to Set up PayPal Accounts

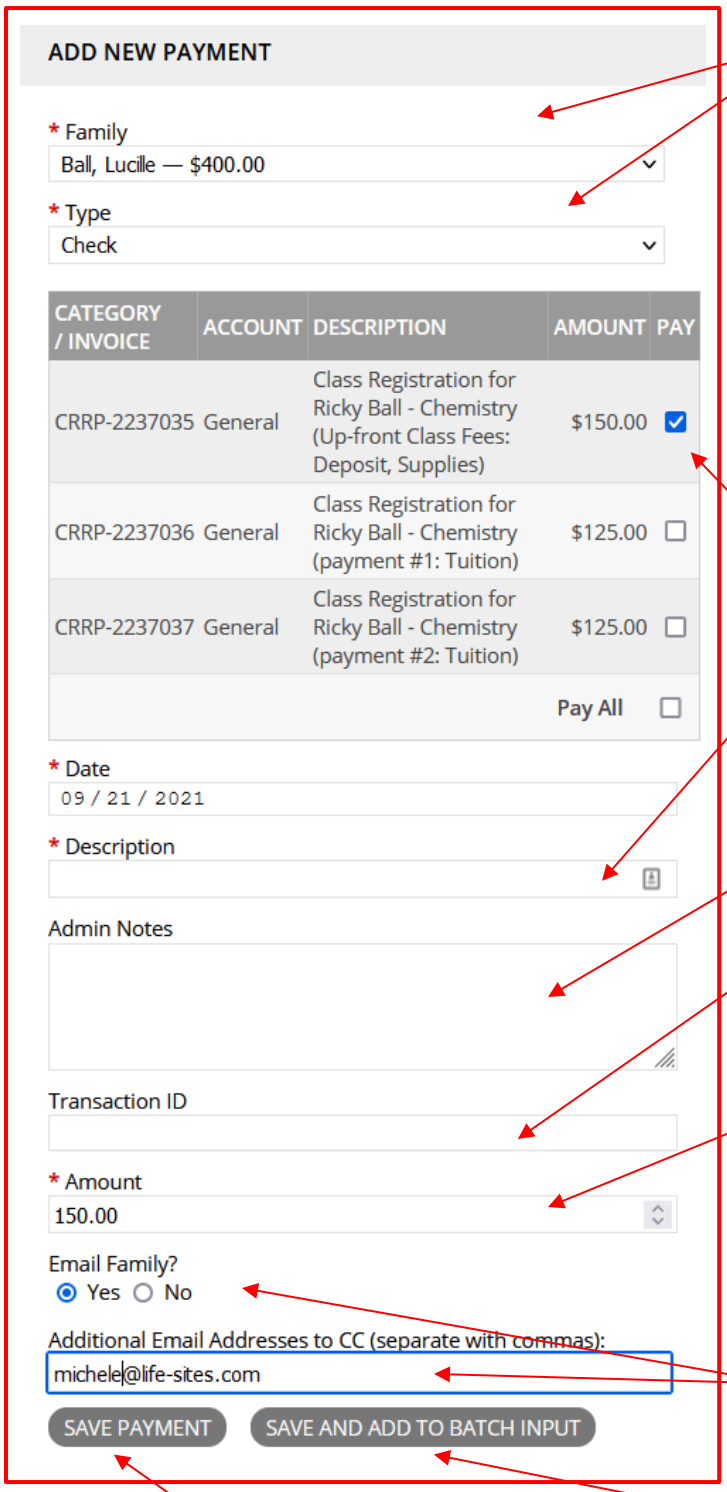
- Admin Site >Accounting
  >Settings
  >+Account



4) How to Record Payments Received by Check or Cash

- Amin Site >Accounting
  >Accounts Receivable (or Payments)





1st – Select the Member and type of payment.

When a member and payment are selected, you will see a dropdown of that member's outstanding invoices, grouped by category type.

If there are balances in the partial payment category accounts, a box will appear showing the balance.

2nd – Choose invoice(s) to mark paid or key in the payment amount to be applied to the partial payment category balance.

3rd – Type description such as "Class Registration PAID IN FULL"

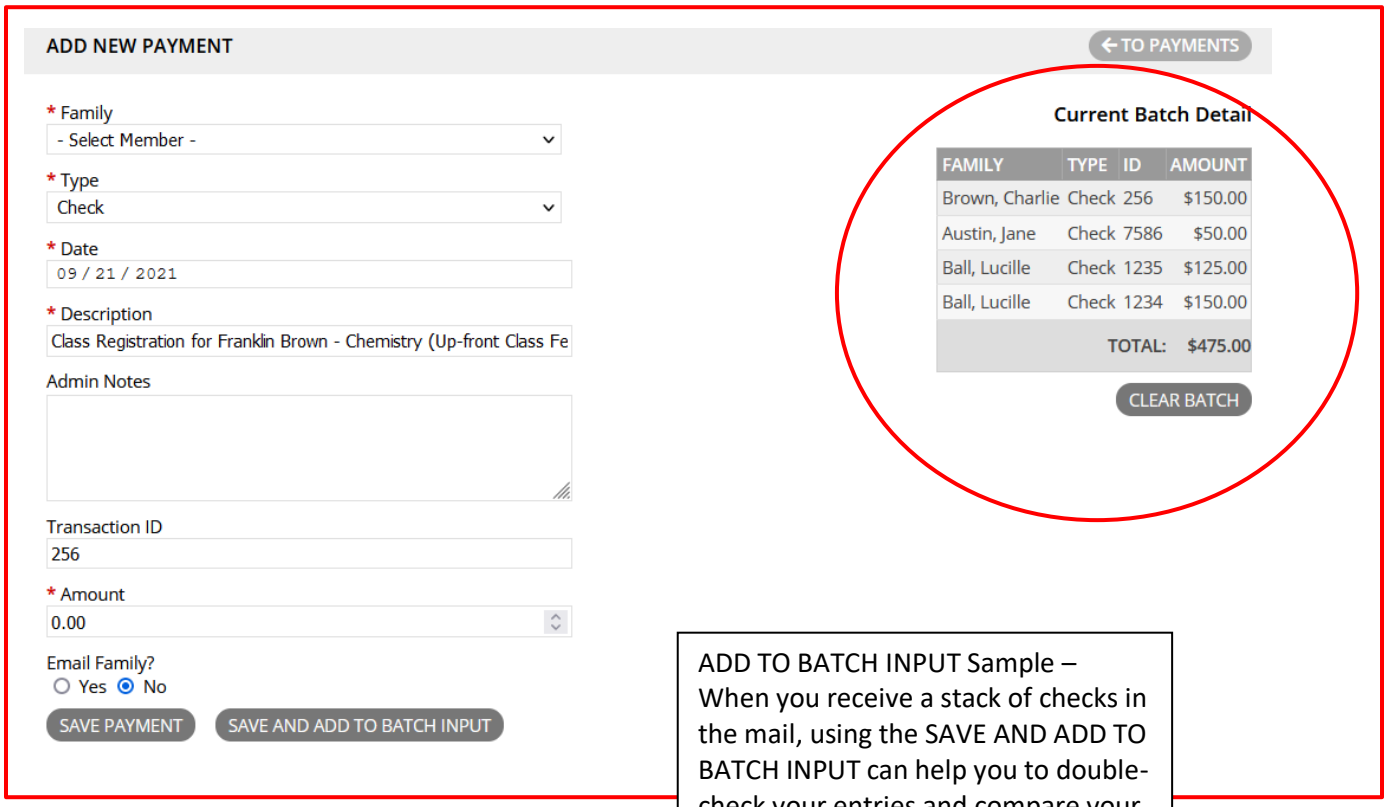
4th – Type Notes such as "Received in mail" or "Handed to me at co-op" (optional)

5th – Check # or Cash Receipt #

6th – Amount will automatically be added for full payment categories. For partial payments categories, the amount will match what was keyed in during Step 2.

7th – Send an Email? Member will receive a receipt. Super Admin email address will be automatically entered in the *Additional Email Addresses to CC* field. You have the option to delete this email or add additional emails

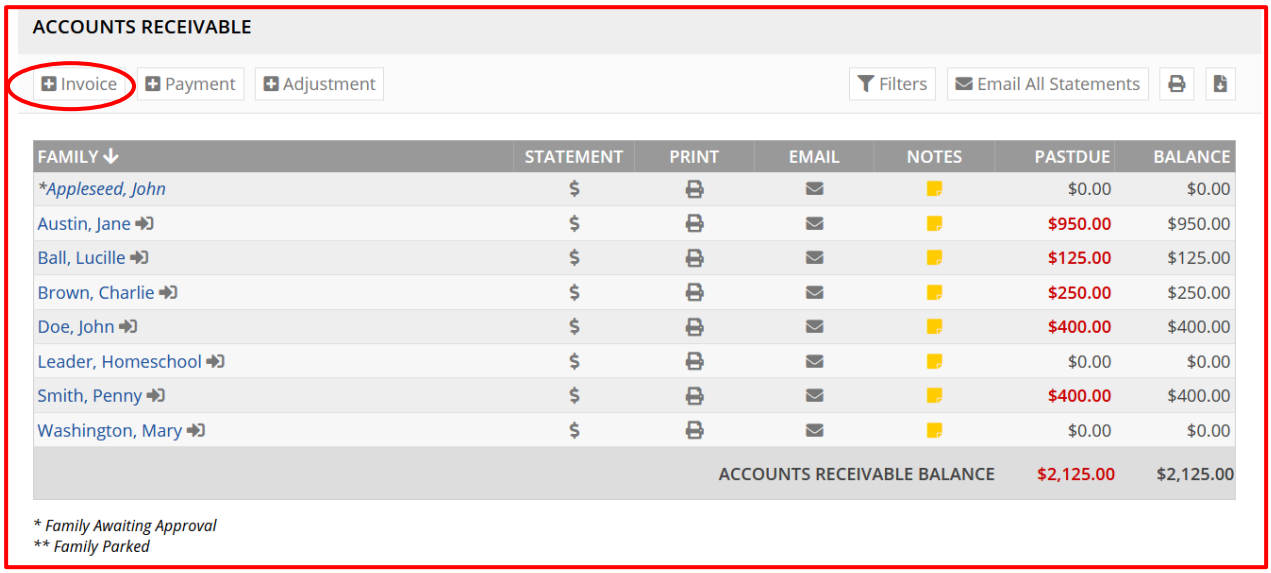
8th – SAVE completes the transaction. SAVE AND ADD TO BATCH INPUT is used if you are recording multiple receivables. They will be grouped in a batch and displayed on the screen so you do not need to start over with each check. (See sample below.)

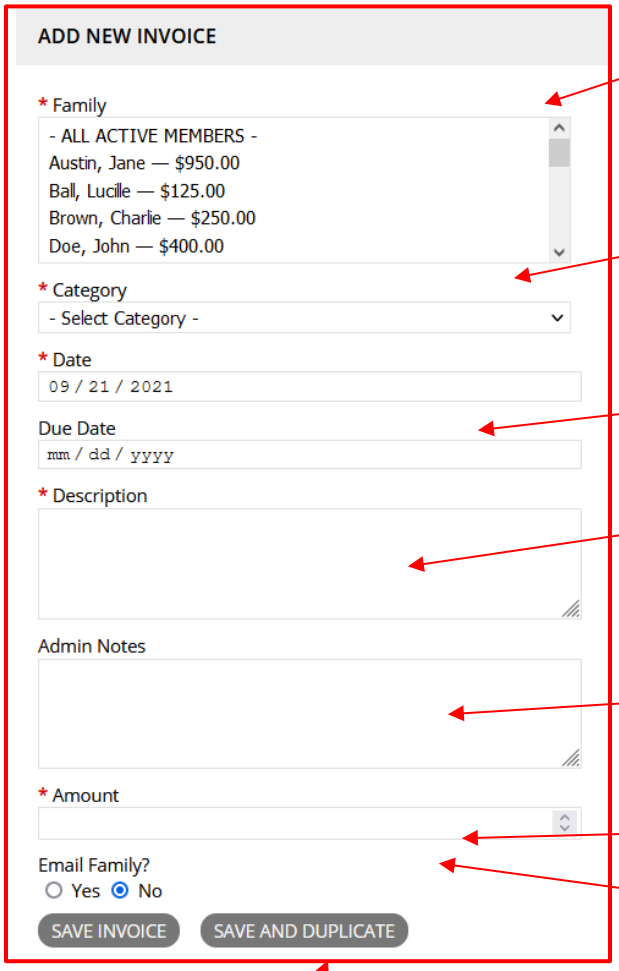


ADD TO BATCH INPUT Sample – When you receive a stack of checks in the mail, using the SAVE AND ADD TO BATCH INPUT can help you to double-check your entries and compare your totals to ensure accuracy.

5) How to Invoice a Member

- Admin Site >Accounting
  >+ New Invoice





1st – Select the Member.

2nd – Select a Category. (Custom categories can be added under Settings.)

3rd – Select Due Date (can click on the calendar to find a specific date)

4th – Type a Description

5th – Admin Notes (optional)

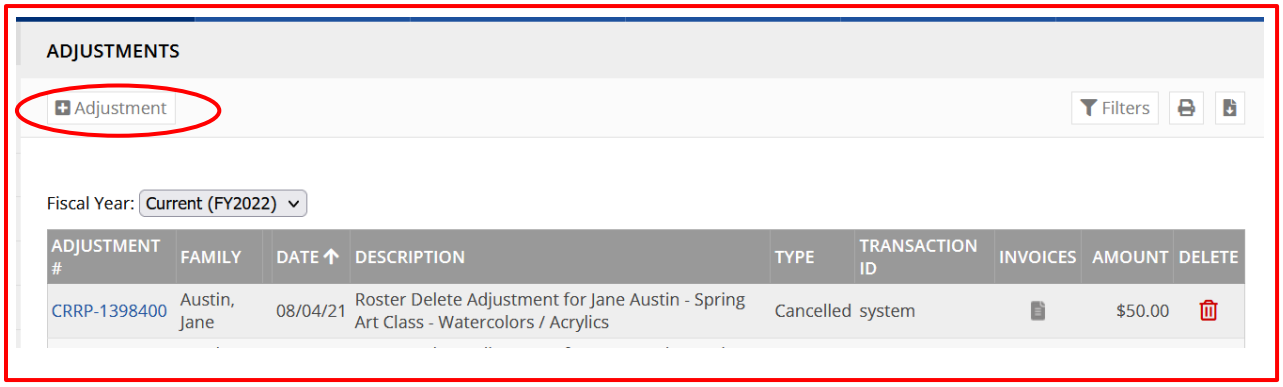
6th – Select Account.

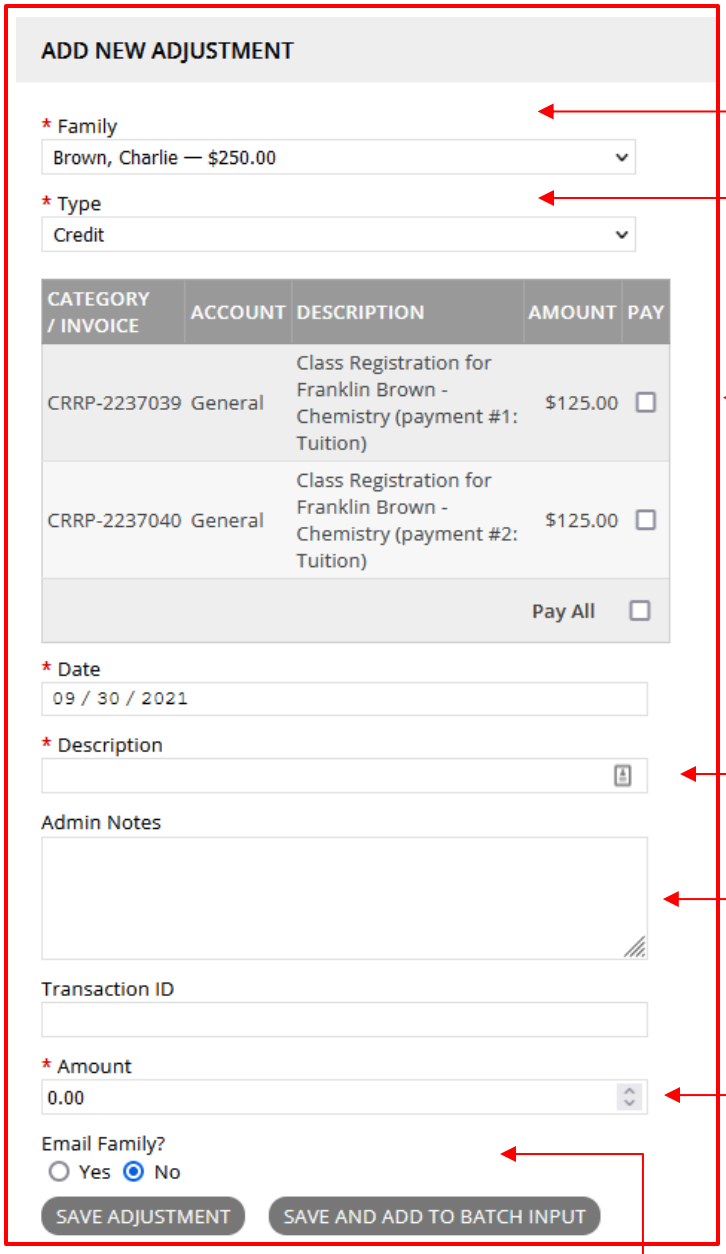
7th – Send an Email? When 'Yes' is selected, the member will receive the invoice. Super Admin email address will be automatically entered in the *Additional Email Addresses to CC* field. You have the option to delete this email or add additional emails

8th – SAVE completes the transaction. SAVE AND DUPLICATE saves the transaction and creates a duplicate transaction so you can invoice another family for the same event.

6) How to make an Adjustment

- Admin Site >Accounting
  >Adjustments
  >Add New Adjustment





1st – After selecting the Member and type of adjustment, you will see a dropdown of that members outstanding invoices, grouped by category type.

You can add additional types of adjustments under the accounting settings link

2nd – Checkmark a box or input the adjustment amount for partial payment categories. The number you input will be positive, but because it is an adjustment it will be deducted from the total amount due.

3rd – Type a description.

4th – Add notes to help define why the adjustment was made.

5th – **Amount** is added automatically in 2nd step.

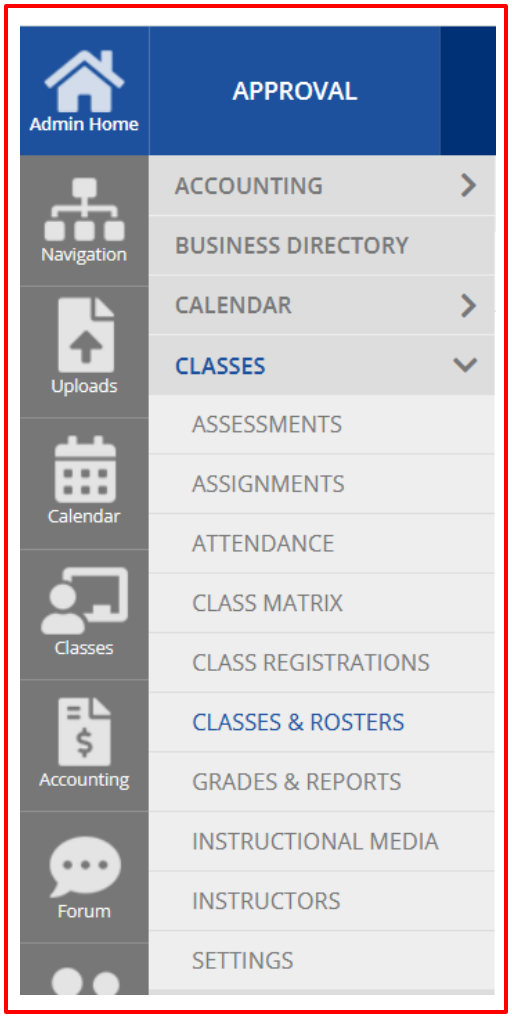
6th – Send an Email? If no, the transaction will just appear in the member's account. If yes, an email will alert the member to the transaction.

7th – **SAVE** completes the transaction. **SAVE AND ADD TO BATCH INPUT** is used if you are recording multiple adjustments. They will be displayed on the screen with a running total. This will allow you to see what you have completed and will save some screen information so you do not need to start over with each transaction.

V. CLASS REGISTRATION

1) Administrative Options

- Amin Site >Classes



Assessments – View assessments by class. You can also access *Class Assessment Categories* from this page

Assignments - View assignments by class. You can filter out assignment categories per class and bulk copy assignments to a different class.

Attendance – View and add attendance records per class. You can also export attendance records per class or for all classes with start date to thru date.

Class Matrix – Set up Matrixes, Columns and Rows. You can also preview what your matrix looks like from this page. The Class Matrix is a layout of your available classes from which your families will make their selections. Watch our YouTube video on setting up a matrix: https://youtu.be/-jEfwA_Pvio

Class Registrations – List of active student/parent registrations. You can filter, print, export registrations and create a nametag merge document. Watch our YouTube video to learn how to create nametags: https://youtu.be/5akEQlSCKhc

Classes & Rosters – Add, filter, print, export classes. Manage Rosters and options to Bulk edit & copy classes, clear rosters and email rosters.

Grades & Reports – View grades of the students per class. You can also access the *Class Grade Settings* from this page.

Instructional Media – View media posted by your instructors.

Instructors – View and add instructors here. You can also print or export all instructors. If instructors need help on their site, you can auto-log in as them from this page.

2) How to Set Up a Class Matrix

- Amin Site >Classes
  >Class Matrix

Because of the diversity of classes offered, classroom space, grades/ages of students, etc., your matrix settings will need to be customized for your group in a way that best meets your needs. The Class Matrix is a layout of your available classes from which your families will make their selections. For example, it may look something like this:

Matrixes

SORT	MATRIX NAME	HIDE	CLASSES	DELETE
↕	2021/2022 Classes (1st Hr)	☐	12	🗑
↕	2021/2022 Classes (2nd Hour)	☐	6	🗑

Columns

SORT	COLUMN NAME	CLASSES	DELETE
↕	Nursery	6	🗑
↕	PreK (3-4 yrs)	6	🗑
↕	K-3rd (5-8 yrs)	8	🗑
↕	4th-6th (9-11 yrs)	7	🗑
↕	7th-8th Grade	6	🗑
↕	9th-12th (12-18 yrs)	8	🗑

Rows

SORT	ROW NAME	ROW COLOR	CLASSES	DELETE
↕	Classroom A	9e9e9e	7	🗑
↕	Classroom B	7f85ab	6	🗑
↕	Classroom C	9e9e9e	4	🗑
↕	Classroom D	7f85ab	6	🗑
↕	Classroom E	9e9e9e	6	🗑
↕	Classroom F	7f85ab	6	🗑
↕	Classroom G	9e9e9e	1	🗑
↕	Classroom H	7f85ab	1	🗑
↕	.Classroom I	7f85ab	1	🗑
↕	Classroom I	9e9e9e	1	🗑

These Matrix Settings would result in the following Matrix Layout, after classes are entered:

2021/2022 Classes (1st Hr)

	NURSERY	PREK (3-4 YRS)	K-3RD (5-8 YRS)	4TH-6TH (9-11 YRS)	7TH-8TH GRADE	9TH-12TH (12-18 YRS)
Classroom A	**Nursery** Nursery					
Classroom B		**PreK Board Game** Pre-Kindergarten - Kindergarten Penny Smith				
Classroom D			**Adventures in Reading** Kindergarten - 2nd Jane Austin	**Poetry and Public Speaking** 4th - 6th Lucille Ball		
Classroom E					**American History** 7th - 8th Mary Doe	
Classroom F						**Chemistry** 9th - 12th Jane Austin, Lucille Ball, Mary Washington
Classroom G						**Economics/Government** 9th - 12th Mary Doe
Classroom H				**Fall Art Class - Pottery** 4th - 6th Jane Austin		
.Classroom I				**Spring Art Class - Watercolors / Acrylics** 4th - 6th John Doe		

2021/2022 Classes (2nd Hour)

	NURSERY	PREK (3-4 YRS)	K-3RD (5-8 YRS)	4TH-6TH (9-11 YRS)	7TH-8TH GRADE	9TH-12TH (12-18 YRS)
Classroom A	**Nursery** Nursery					
Classroom B		**Lego Club** Pre-Kindergarten - Kindergarten Penny Smith				
Classroom C			**Cooking around the World** Kindergarten - 3rd Jane Austin			
Classroom D				**Intro to French** 4th - 6th Lucille Ball		
Classroom E					**Civil War Class** 7th - 8th Charlie Brown	
Classroom F						**Economics/Government** 9th - 12th Mary Doe

MATRIX SETTING SUGGESTIONS

This list contains suggestions to consider when you are setting up your Class Registration Matrix. It is not an exhaustive list but may help start spark your creativity. You would choose only 1 (one) bullet point in each category.

Matrix Management:

- Preschool, Elementary, Middle School, High School
- Fall Semester, Spring Semester, Full Year Classes
- Days of the week when you offer Classes
- Categories of Classes offered (Science, Math, Literature, Enrichment, Art, PE)
- Hours or Periods

Column Management:

- Rooms or Locations
- Grades or Ages
- Class Times

Row Management: (if not used for Column Management)

- Rooms or Locations
- Grades or Ages
- Class Times
- A, B, C, etc.
- 1, 2, 3, etc.

After your matrix is set up, it is time to add classes. (Note: You can set up the matrix after you set up your classes)

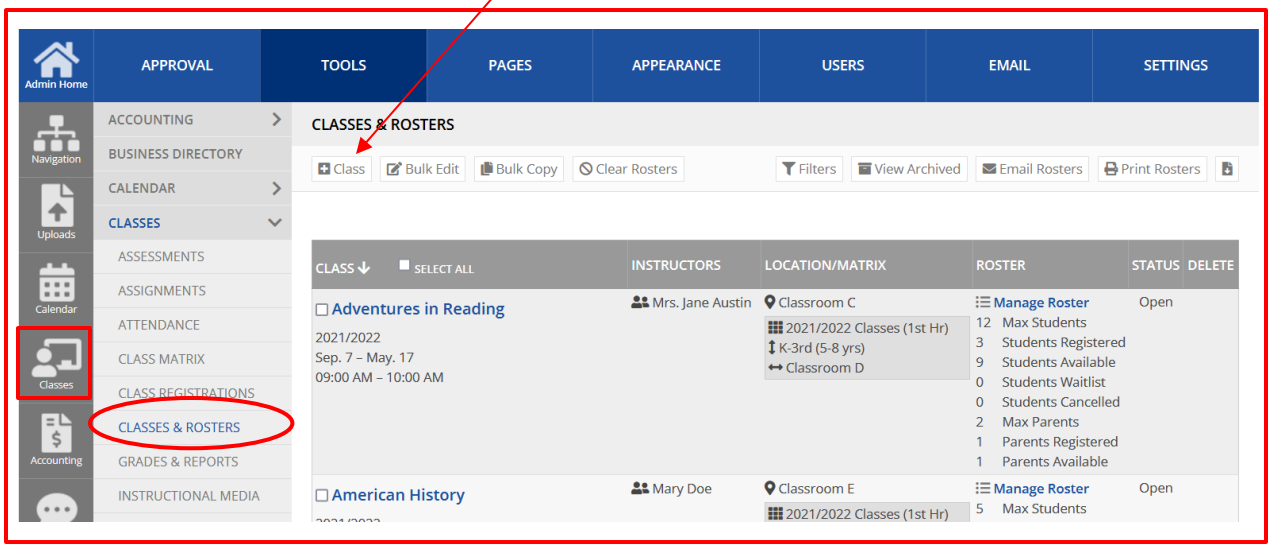
You can add all of your classes as the admin or you can have your instructors add them as a class request on the members page. You would then approve their classes and edit as needed.

To allow the instructors to add their classes from the members page you must:

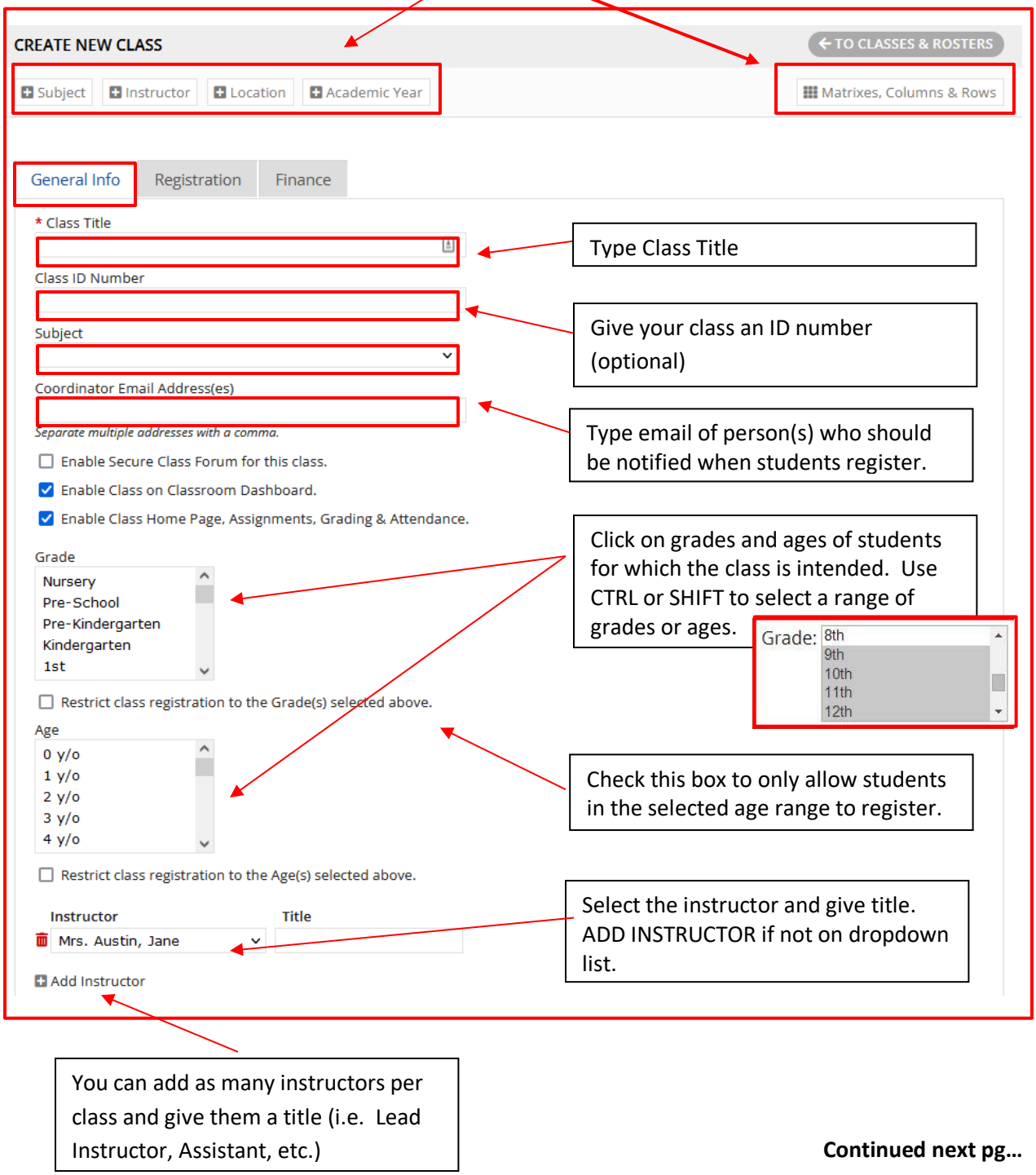
I. Add them as an instructor under **Classes, Instructors**. (See **How to Add an Instructor** below)
II. Make sure to include the **My Classes** widget on the Parent/Instructor/Student dashboard. (This allows them to Request Class) You can find this under **Pages, Classroom Dashboard.** (See **How to set up Classroom Dashboards**)
III. Turn the settings on under **Classes, Settings** titled *Allow families and instructors to create new class requests.* (See **Class Settings**)

3) How to Add a Class as an Admin

- Amin Site >Classes
  >Classes & Rosters
  >Add New Class (Be sure to log out as a family on the family portal)



To add a subject, instructor, location, academic year or additional matrixes, columns & rows from this page, click on the options at the top of the page. **Beware**: Any changes/additions you have made on this page will not be saved. If you have made changes/additions, save first then add these options.



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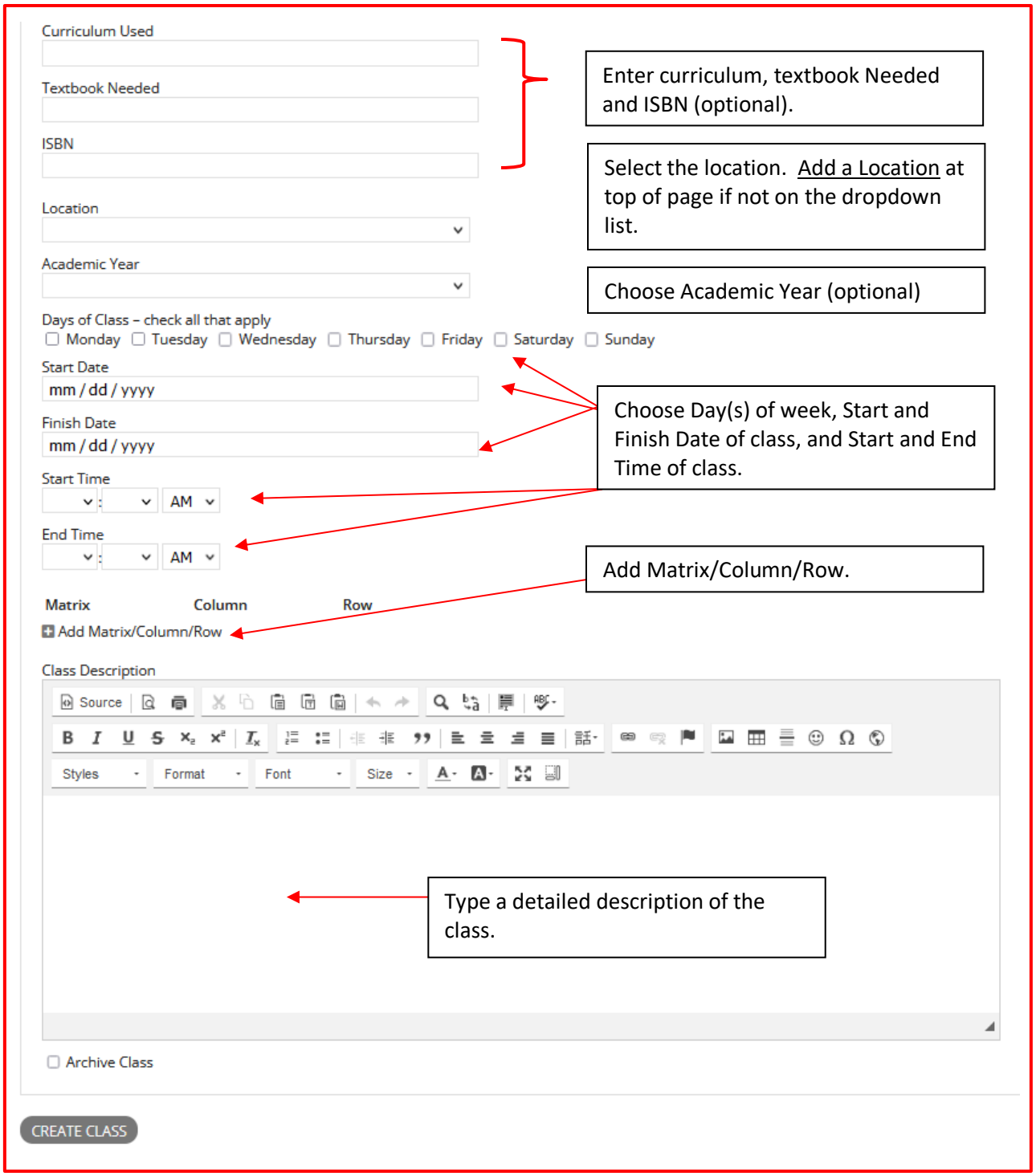

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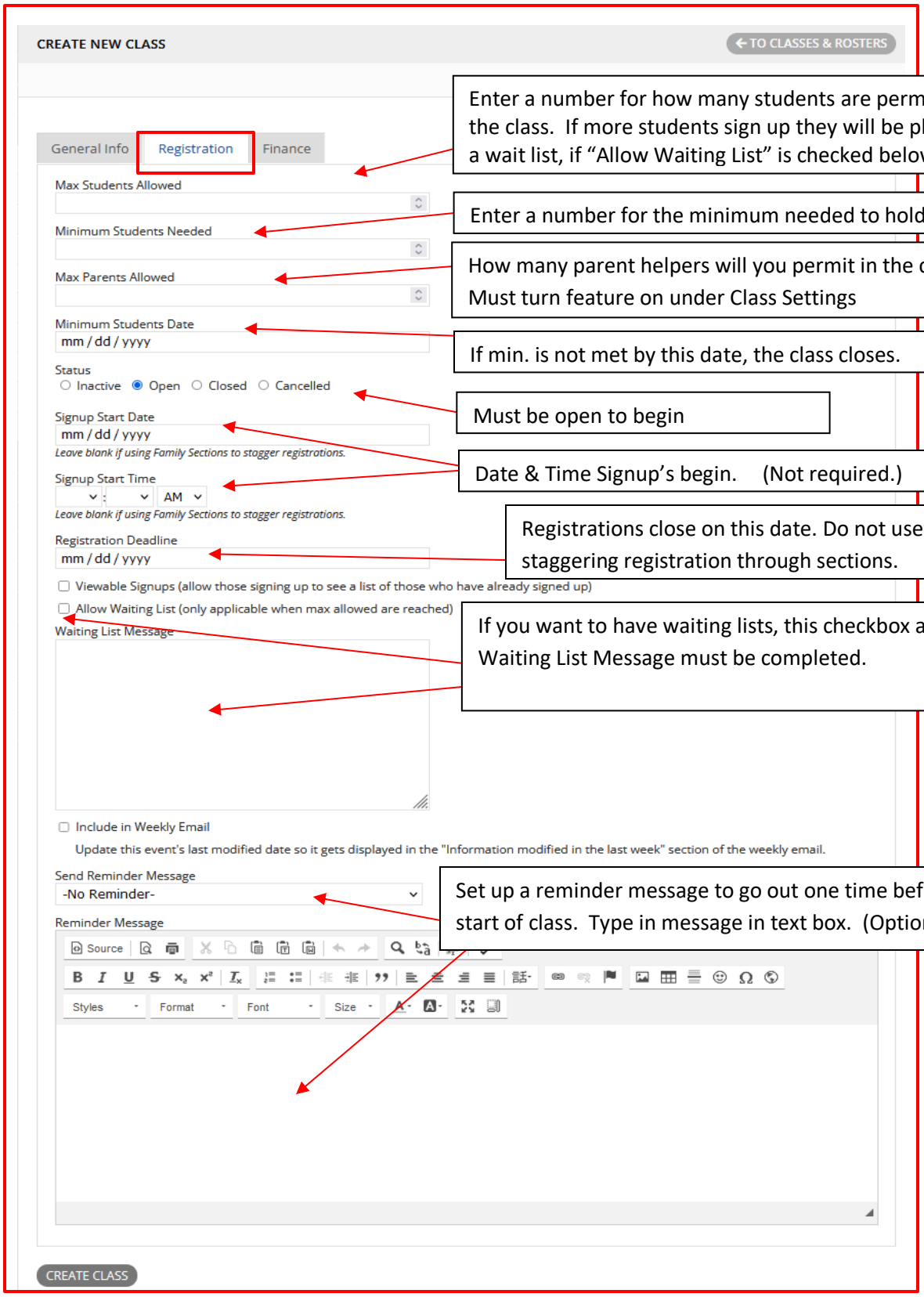


Enter a number for how many students are permitted in the class. If more students sign up they will be placed on a wait list, if "Allow Waiting List" is checked below.

Enter a number for the minimum needed to hold a class.

How many parent helpers will you permit in the class? Must turn feature on under Class Settings

If min. is not met by this date, the class closes.

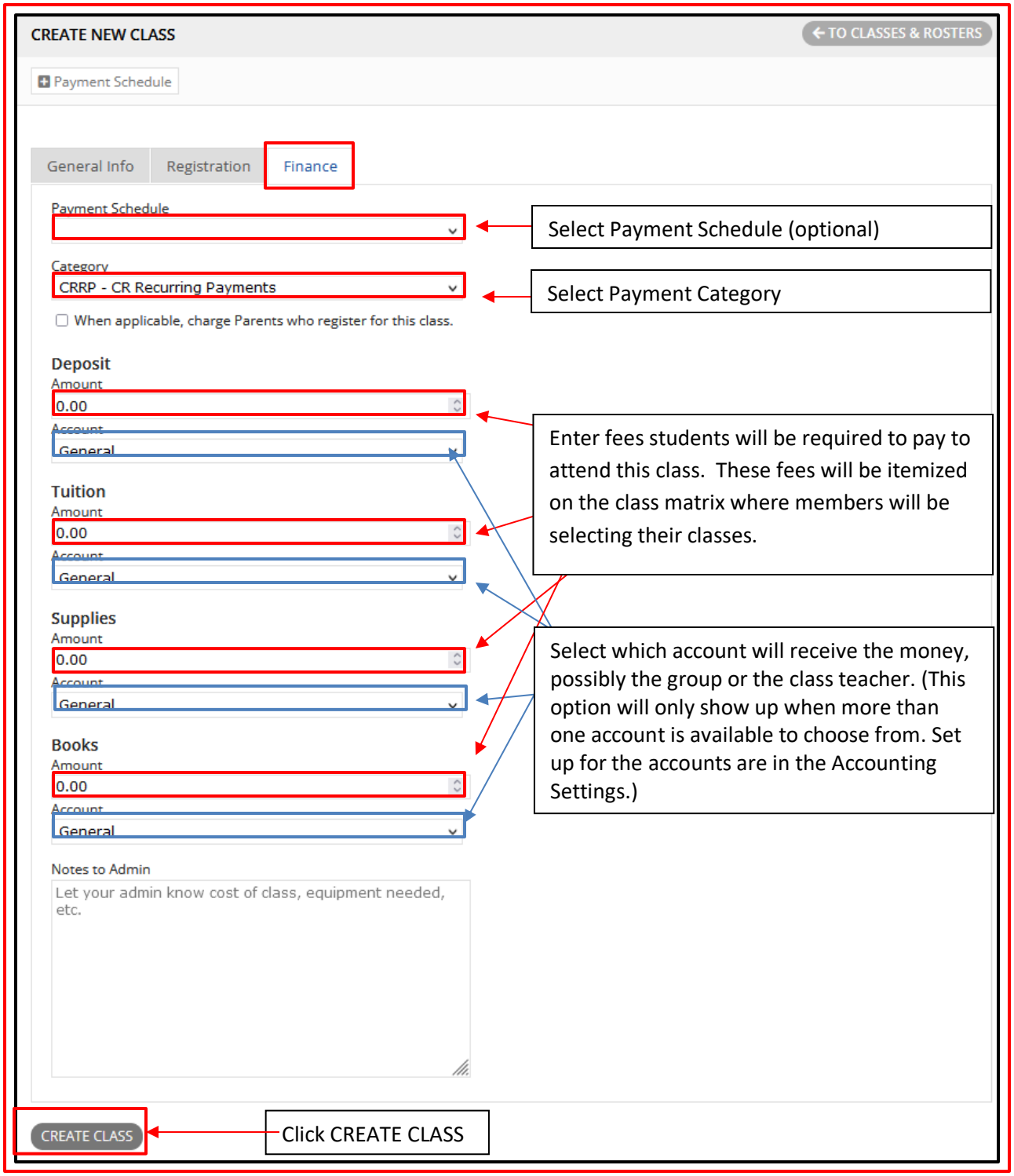
Must be open to begin

Date & Time Signup's begin. (Not required.)

Registrations close on this date. Do not use if staggering registration through sections.

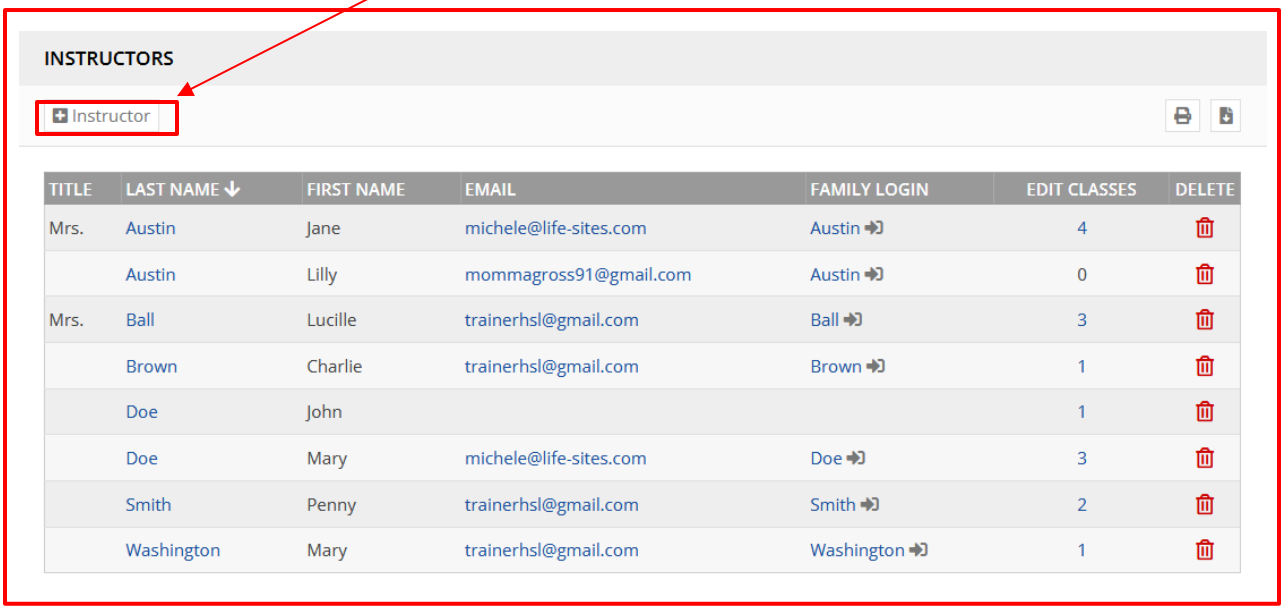
If you want to have waiting lists, this checkbox and this Waiting List Message must be completed.

Set up a reminder message to go out one time before the start of class. Type in message in text box. (Optional)

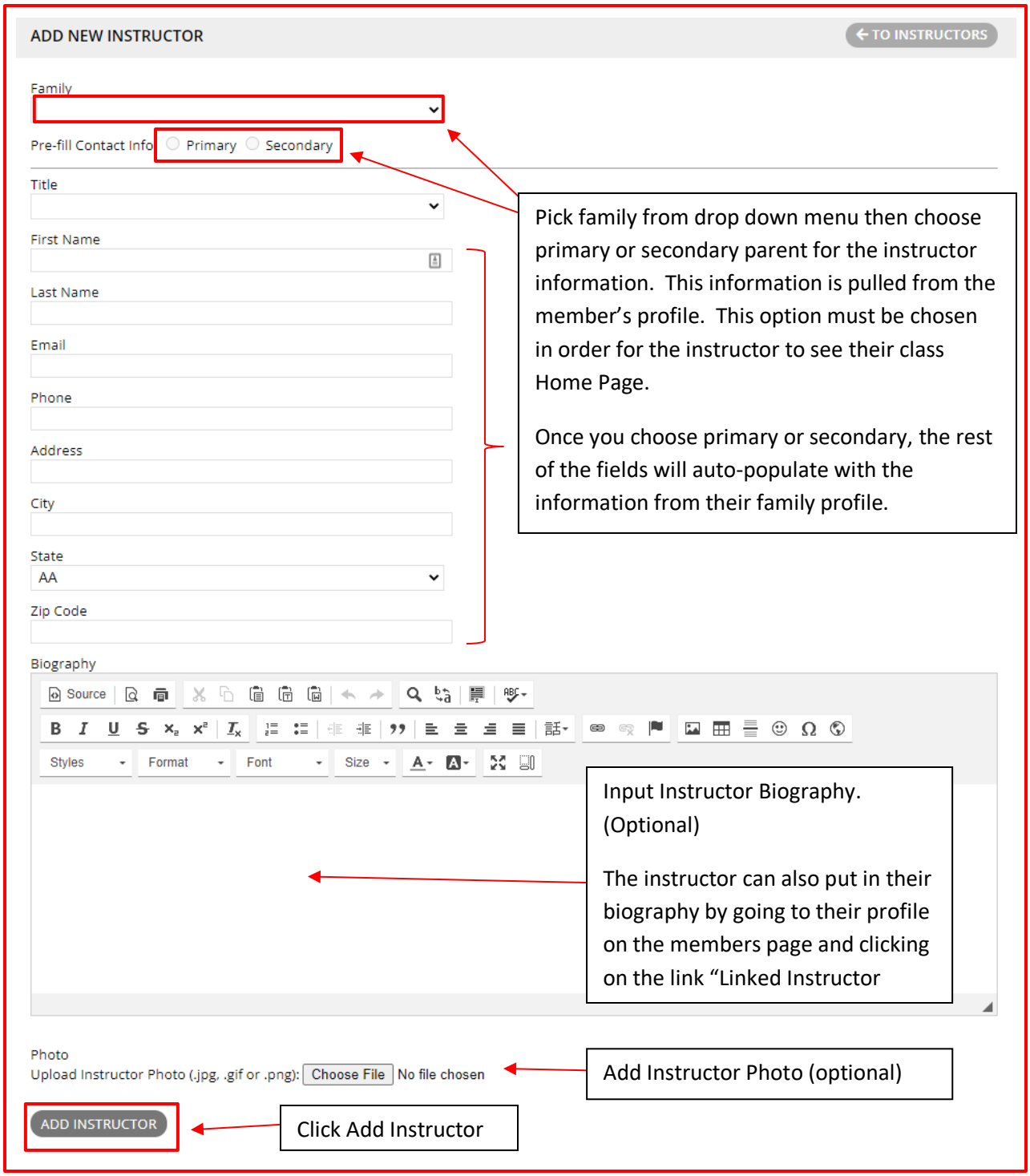


4) How to Add an Instructor

- Amin Site >Classes
  >Instructors
  >+ Instructor

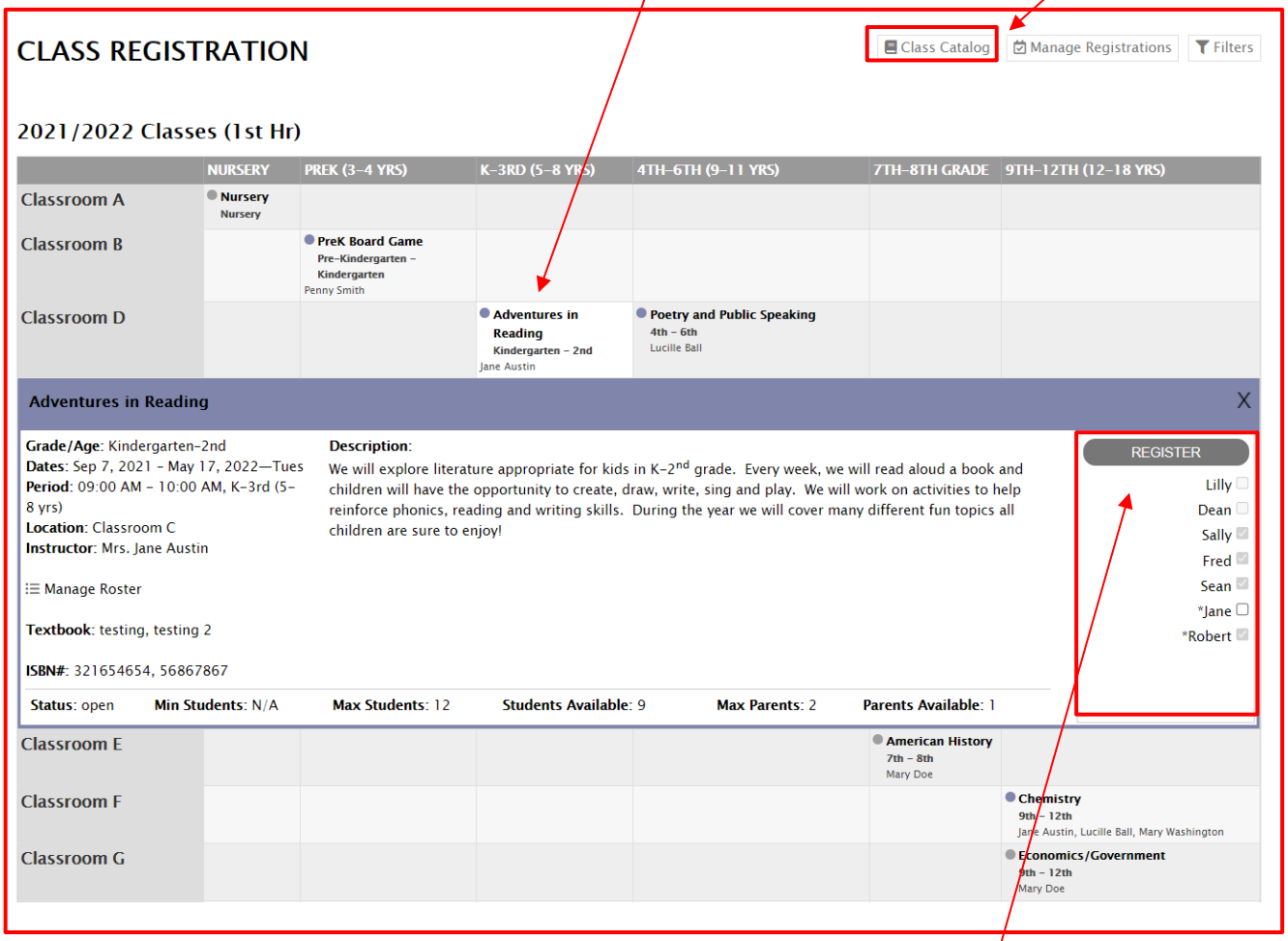


TITLE	LAST NAME	FIRST NAME	EMAIL	FAMILY LOGIN	EDIT CLASSES	DELETE
Mrs.	Austin	Jane	michele@life-sites.com	Austin	4	
	Austin	Lilly	mommagross91@gmail.com	Austin	0	
Mrs.	Ball	Lucille	trainerhsl@gmail.com	Ball	3	
	Brown	Charlie	trainerhsl@gmail.com	Brown	1	
	Doe	John			1	
	Doe	Mary	michele@life-sites.com	Doe	3	
	Smith	Penny	trainerhsl@gmail.com	Smith	2	
	Washington	Mary	trainerhsl@gmail.com	Washington	1	

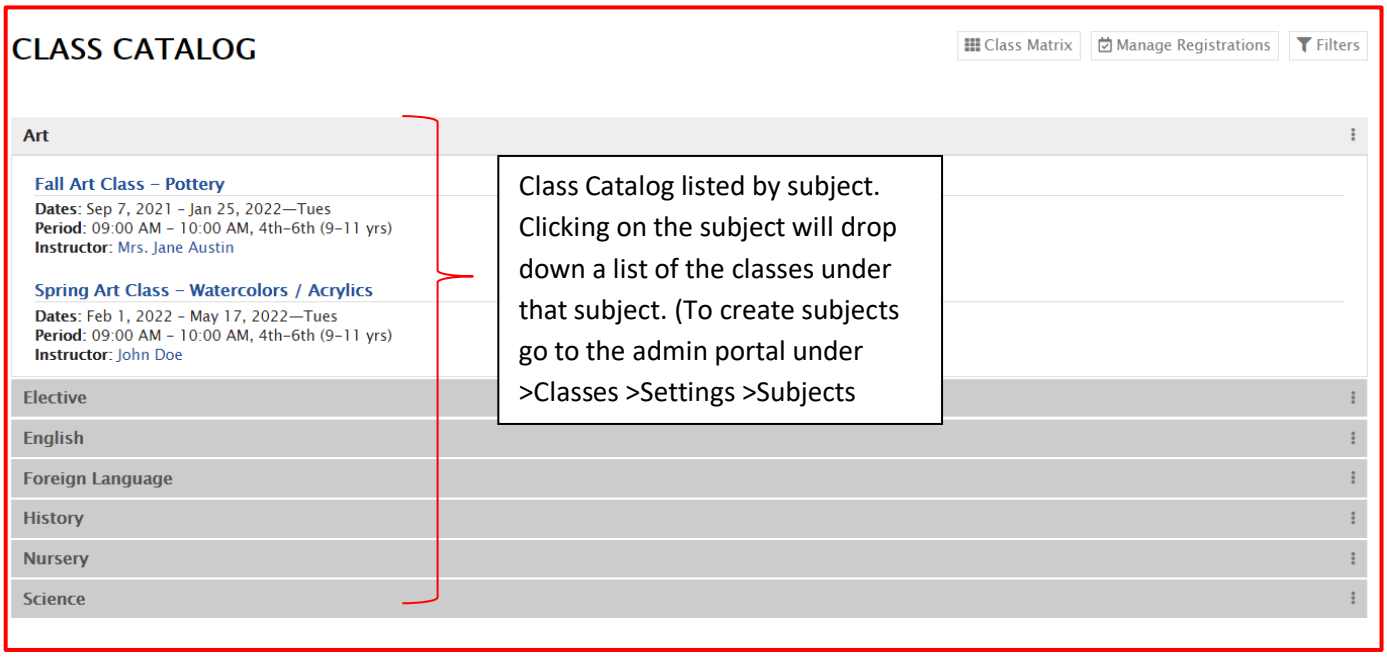


5) How do Students Register

- Member Site >Class Registration (This can be located in many places of your website: Button, Top Navigation link, etc.) From this page you can click on Class Catalog to view classes alphabetically or by subject if your admin has set up subjects in the classes. (See next page on how this looks)
  >Click on the desired Class to register.

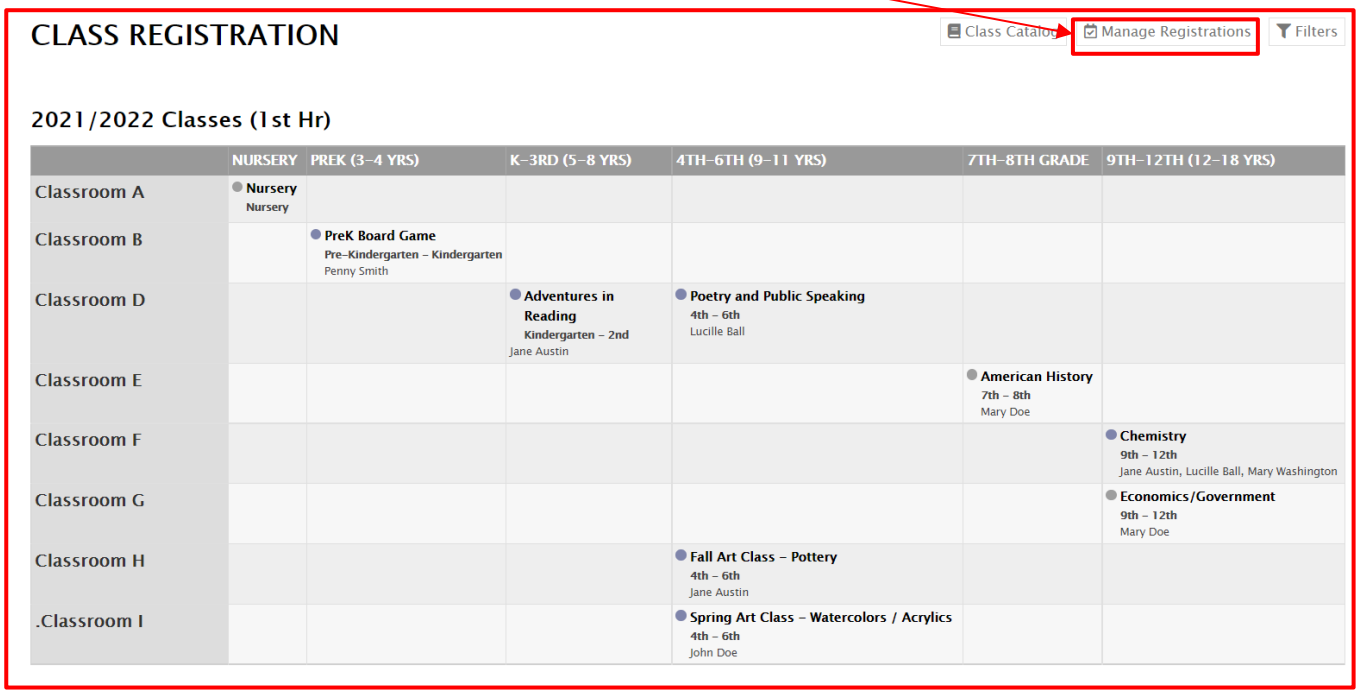


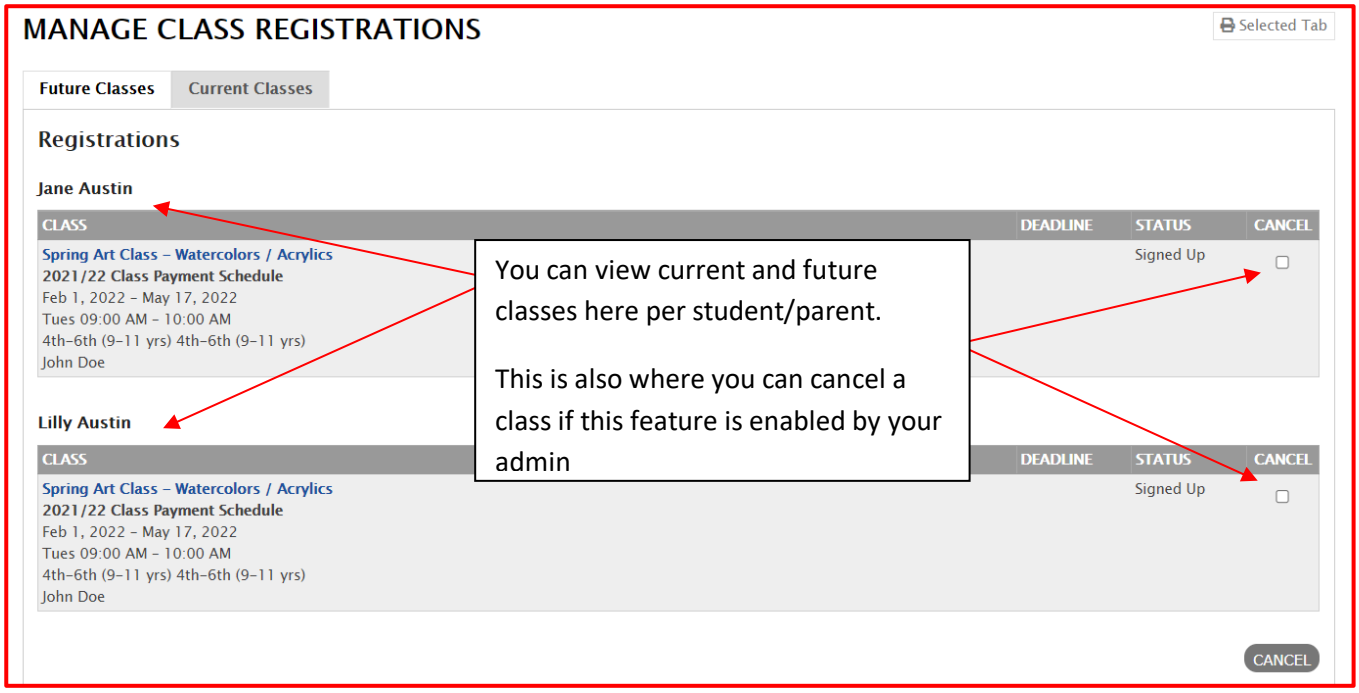
Check the box next to the student to register for the class then click on Register.



6) How can Members Check Their Registration

- Member Site >Class Registration
  >Manage Registration



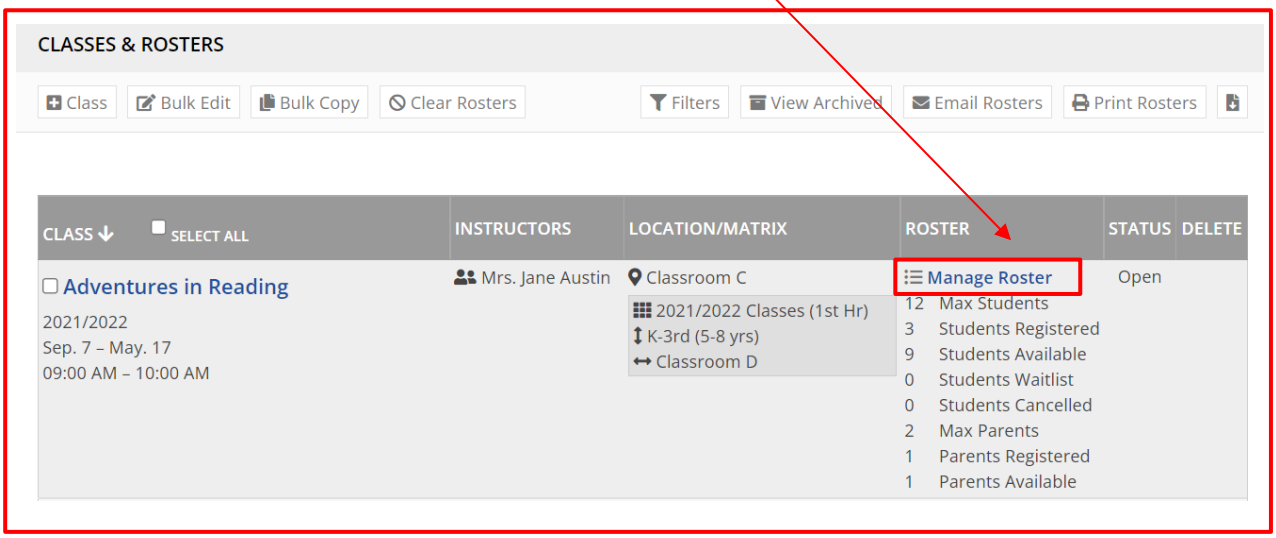


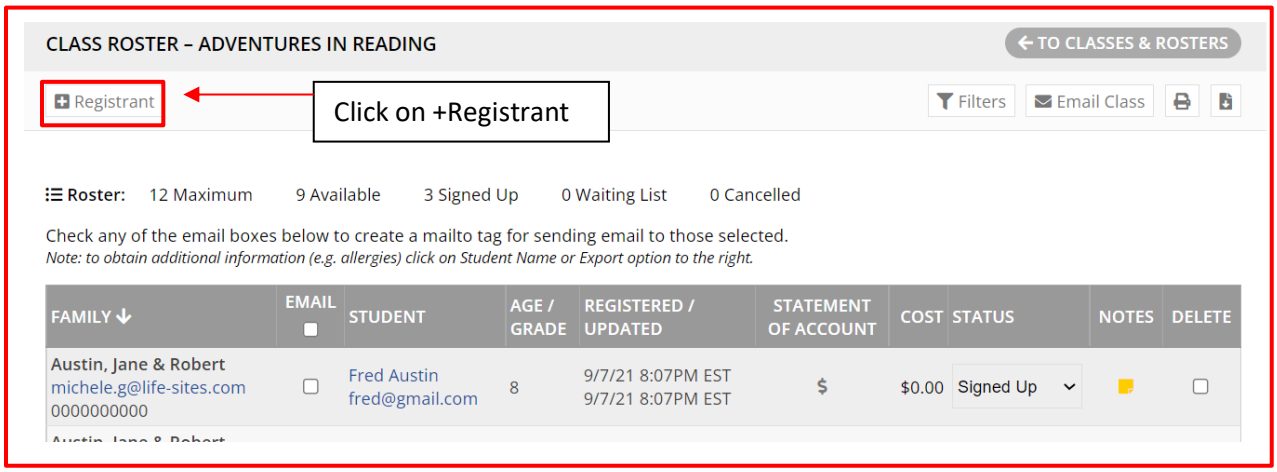
You can view current and future classes here per student/parent.

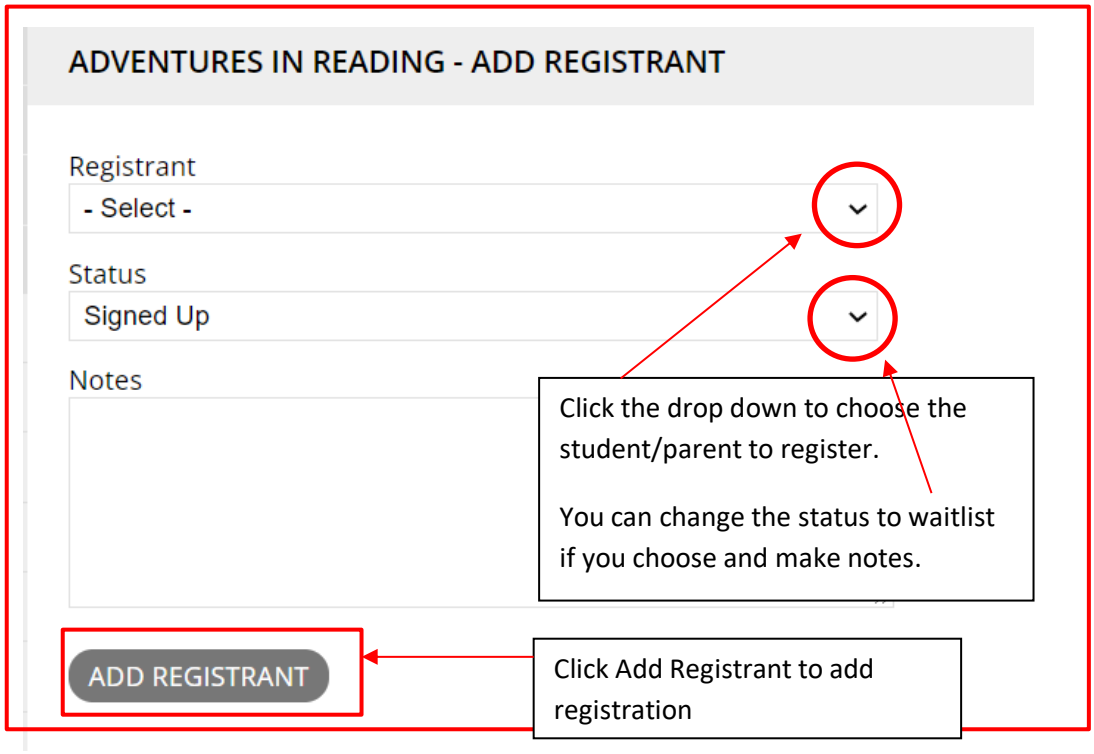
This is also where you can cancel a class if this feature is enabled by your admin

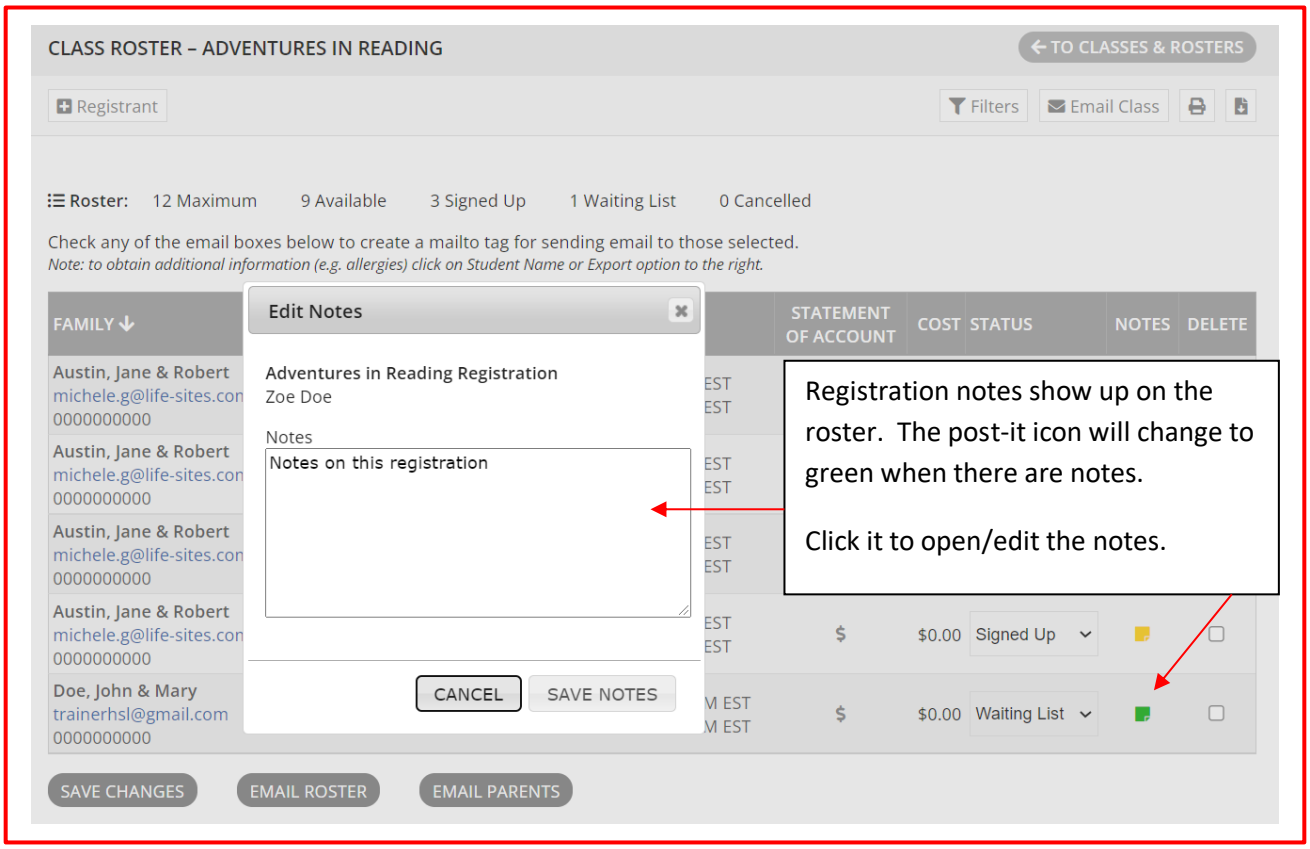
7) How can Admins register students/parents for classes

- Admin Site >Classes
  >Click on Manage Roster for class to register



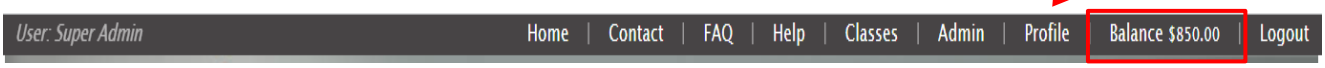






8) How can Members Check their Statement of Accounts

- Member Site >Balance



ACCOUNTING

Statement of Account | Invoice & Payment Details

Outstanding Balances

ACCOUNT: GENERAL		TOTAL: $1,150.00	PAY NOW: $0.00	PAYPAL
Category / Invoice	**Description**	**Due Date**	**Amount**	**Pay**
CR	[Class Registration Total Balance]		$300.00	0.00
⊟ 2 INVOICES		06/02/2021	$100.00	
CRRP-2185897	Class Registration for Jane Austin - Spring Art Class - Watercolors / Acrylics (Up-front Class Fees: Supplies)	06/02/2021	$50.00	☐
CRRP-2287247	Class Registration for Dean Austin - Fall Art Class - Pottery (Up-front Class Fees: Supplies)	06/02/2021	$50.00	☐
⊟ 2 INVOICES		07/15/2021	$250.00	
CRRP-2185895	Class Registration for Lilly Austin - Spring Art Class - Watercolors / Acrylics(payment #1: Tuition)	07/15/2021	$125.00	☐
CRRP-2185898	Class Registration for Jane Austin - Spring Art Class - Watercolors / Acrylics(payment #1: Tuition)	07/15/2021	$125.00	☐
⊟ 2 INVOICES		08/16/2021	$250.00	
CRRP-2185896	Class Registration for Lilly Austin - Spring Art Class - Watercolors / Acrylics(payment #2: Tuition)	08/16/2021	$125.00	☐
CRRP-2185899	Class Registration for Jane Austin - Spring Art Class - Watercolors / Acrylics(payment #2: Tuition)	08/16/2021	$125.00	☐
⊟ 2 INVOICES		11/30/2021	$250.00	
CRRP-2287248	Class Registration for Dean Austin - Fall Art Class - Pottery(payment #1: Tuition)	11/30/2021	$125.00	☐
CRRP-2287249	Class Registration for Dean Austin - Fall Art Class - Pottery(payment #2: Tuition)	11/30/2021	$125.00	☐
			PAY ALL	☐

ACCOUNTING CATEGORIES

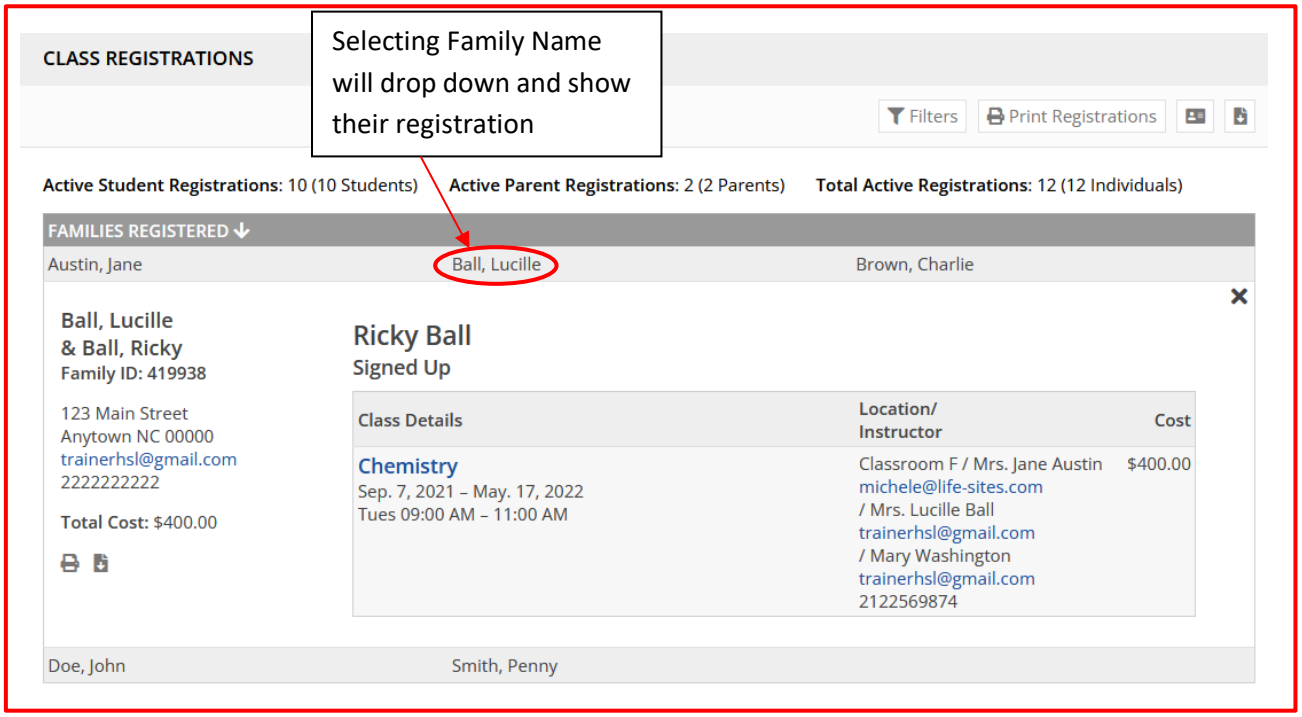
CR - Class Registration
CRRP - CR Recurring Payments
RR - Registration & Renewals
SU - Sign Ups
OT - Other
AUO - Admin Use Only
SP - Shakespeare Play
LF - Late Fee
CCR - Co-op Class Registration
GR - Graduation

Over-due invoices will turn red. To pay online (if offered through your group), check mark the box next to the invoice(s) then click the PayPal button to pay.

Or enter the amount in the box if the invoice is a partial payment category like the CR invoice above.

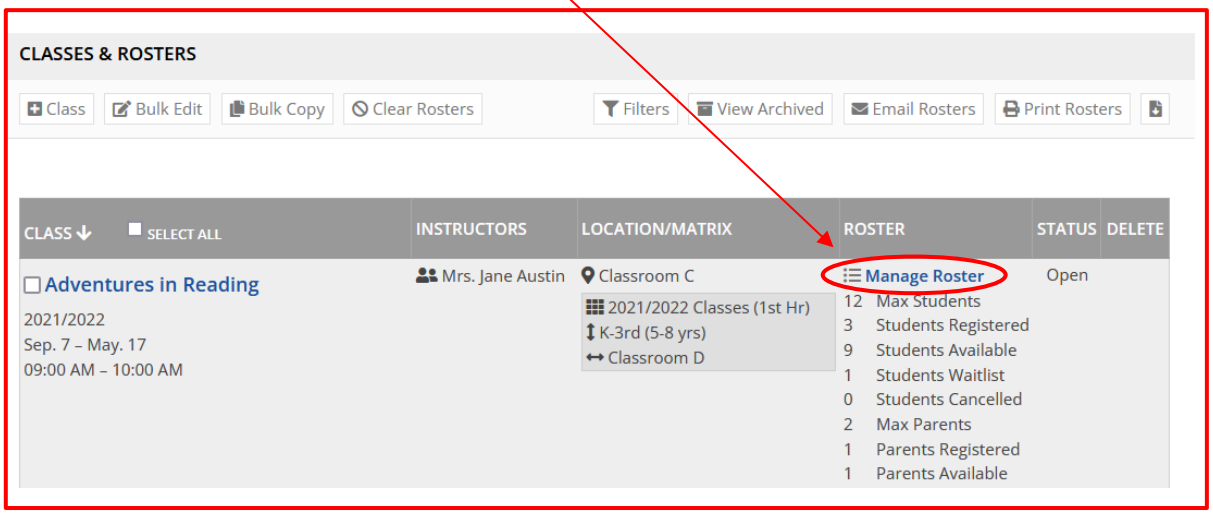
9) How Can Administrators Check a Family's Registration?

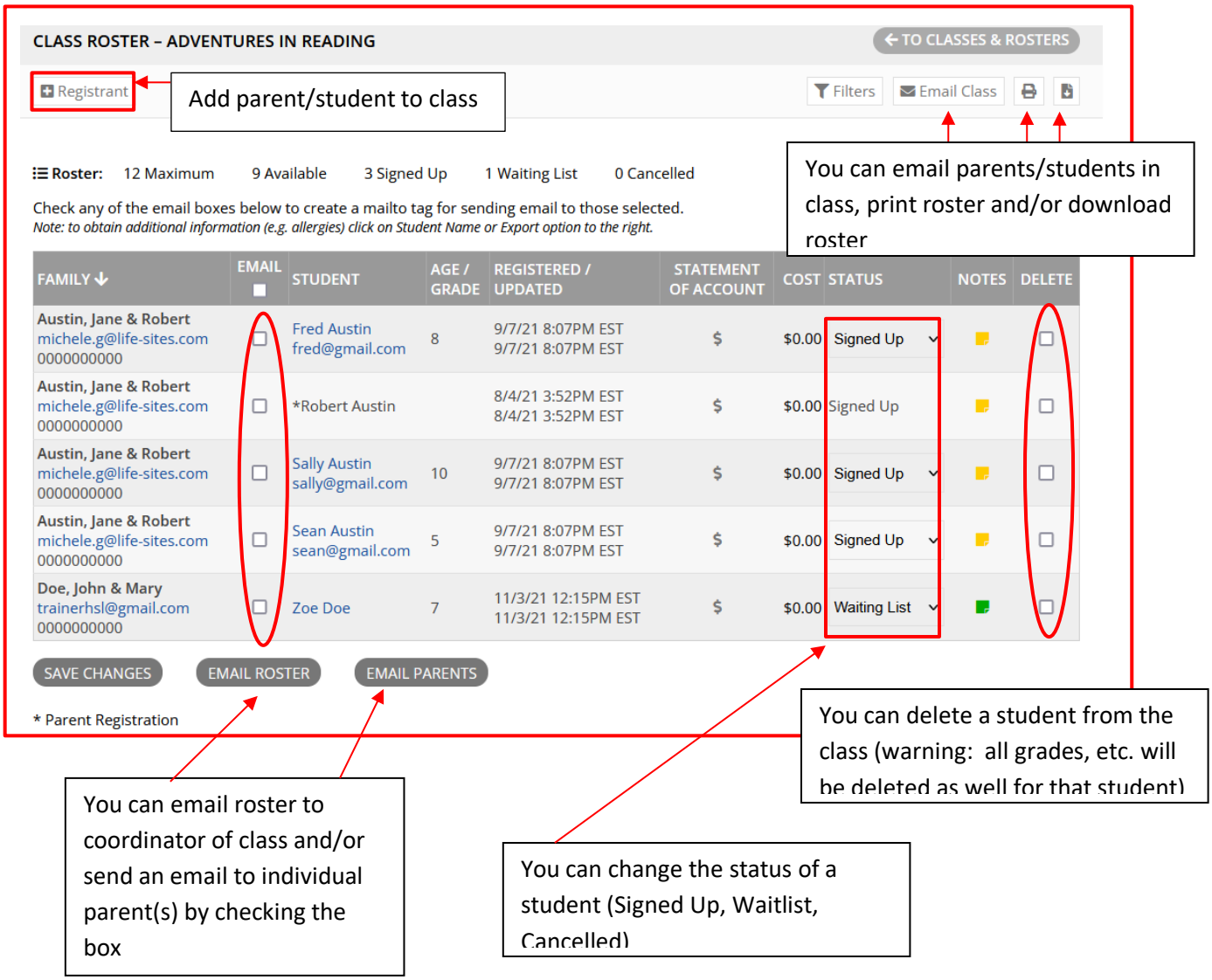
- Admin Site >Classes
  >Class Registrations



10) How Can Administrators Check Class Rosters

- Admin Site >Classes
  >Classes & Rosters
  >Manage Roster

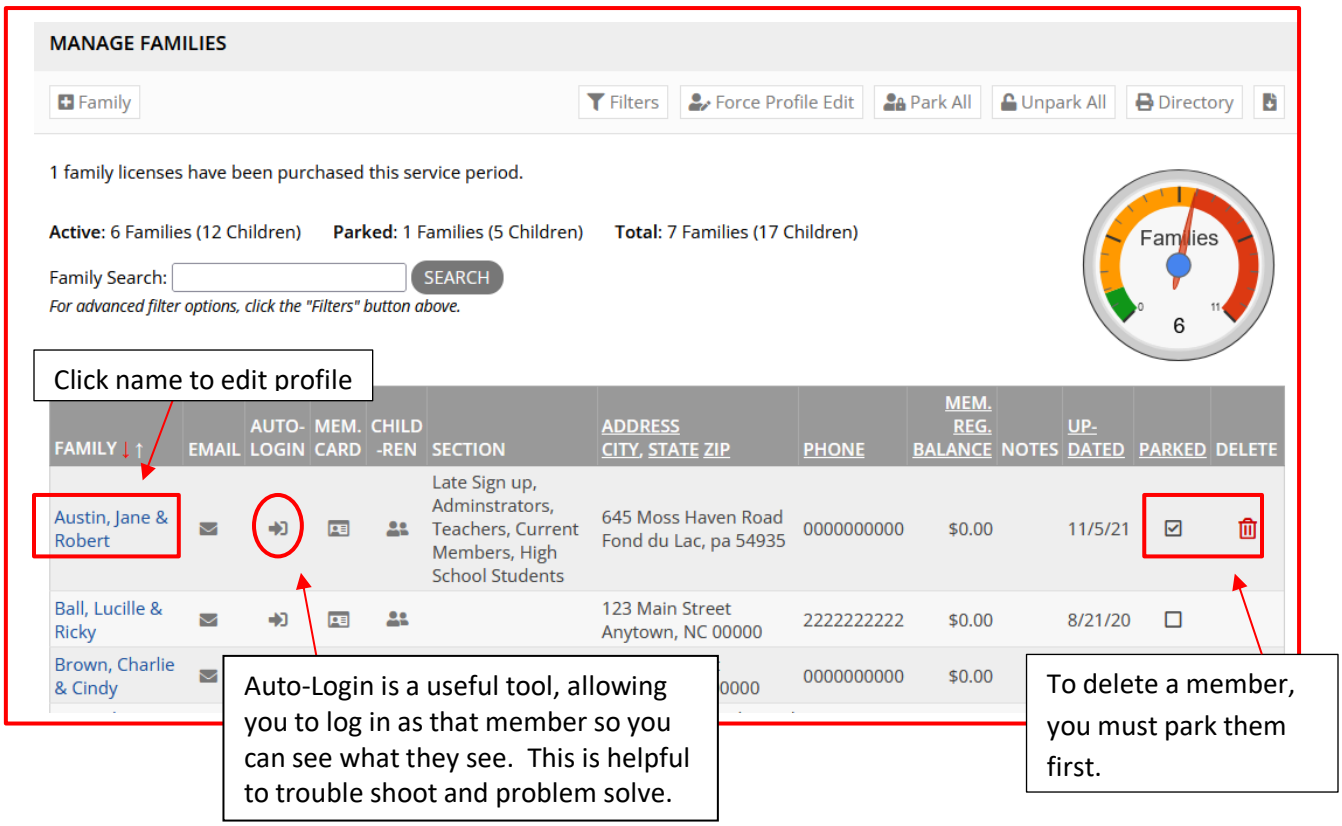




VI. MEMBERS

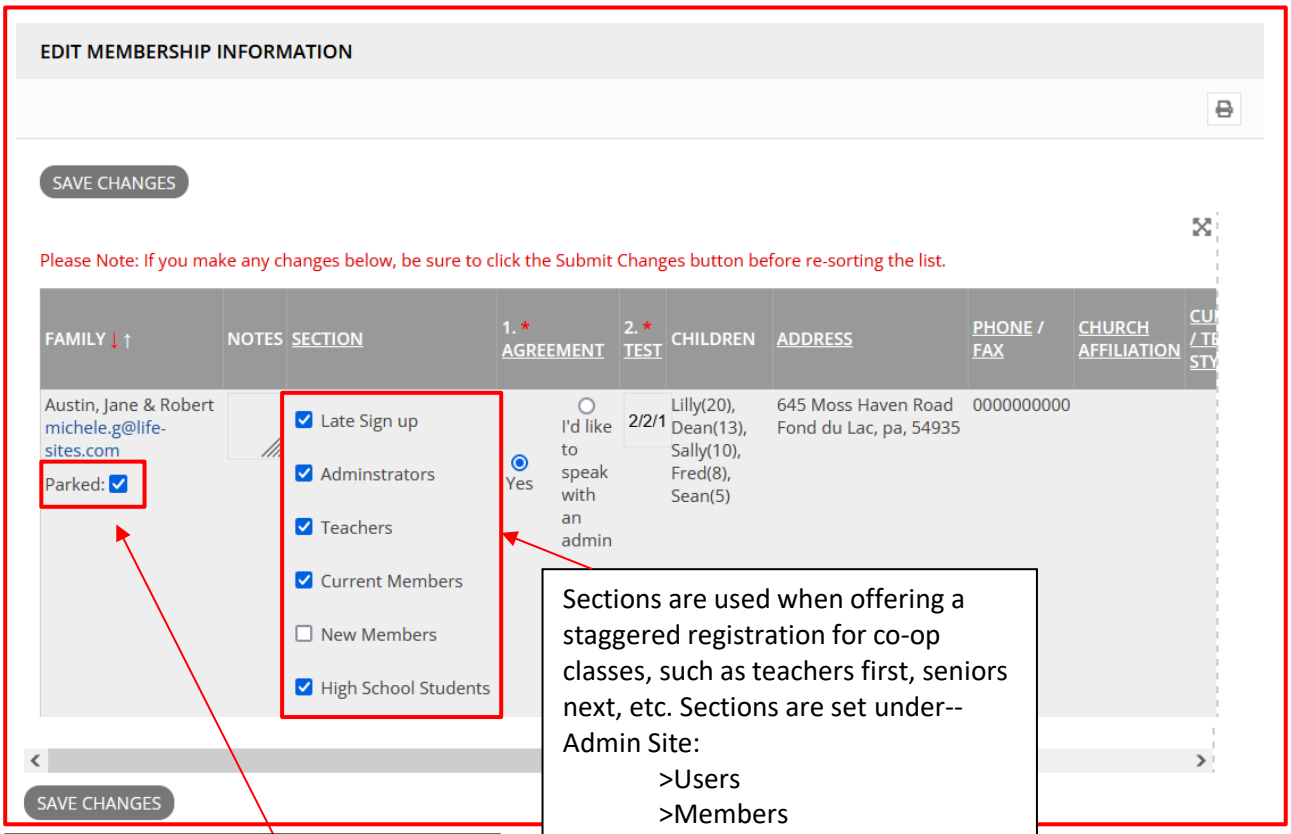
1) How to Update or Delete Individual Members

- Admin Site >Members
  >Families
  >Manage



2) How to make Mass changes to Membership such as Parking or Assigning Sections

- Admin Site >Members
  >Families
  >Edit Info



Sections are used when offering a staggered registration for co-op classes, such as teachers first, seniors next, etc. Sections are set under--
Admin Site:
>Users
>Members
>Sections

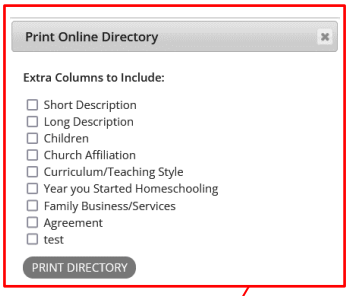
Parking a member is used when a member has not renewed yet but is probably planning to renew soon. Rather than delete their account, they can be parked. Parking retains their information and allows the member to access their profile and statement of accounts only.

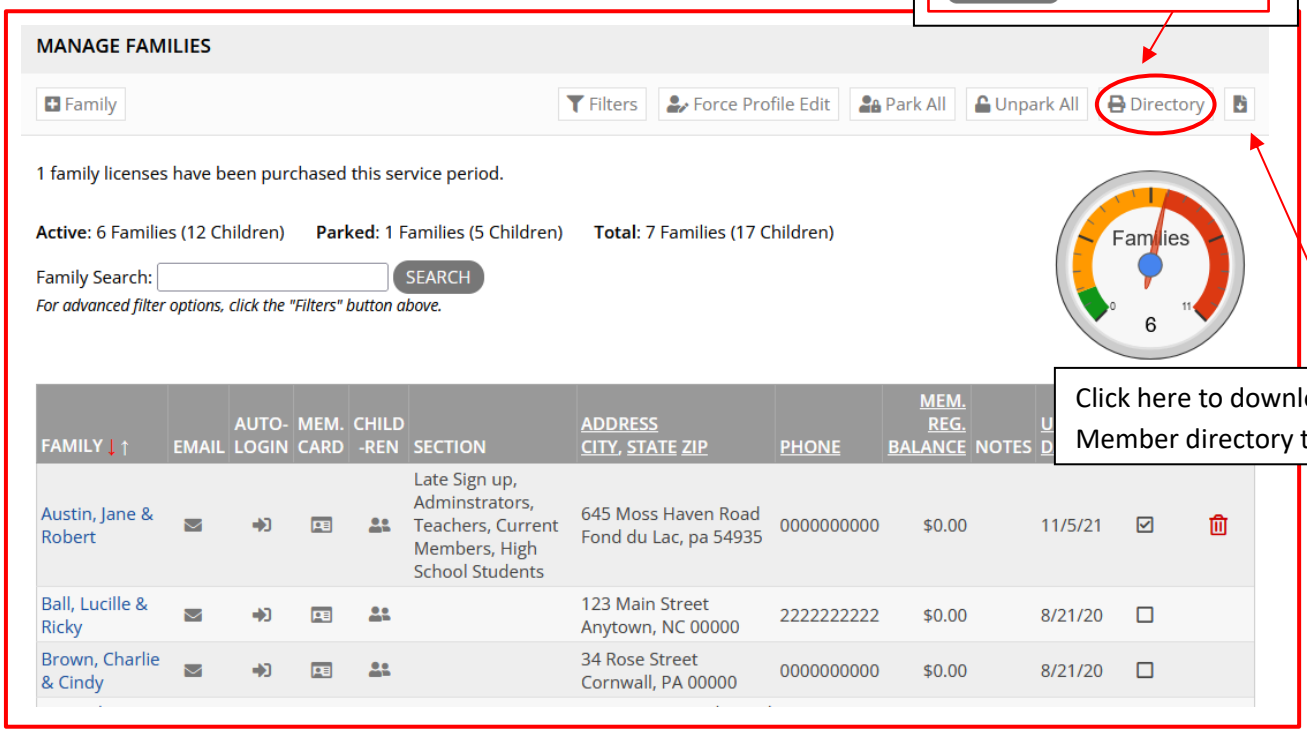
VII. DOWNLOAD to EXCEL

1) How to Download the Membership Directory

- Admin Site >Users
  >Members
  >Directory

Click here to view or print an online directory. Select the fields you wish to view form the pop-up box:





Click here to download the Member directory to Excel.

2) Other Data that can be Downloaded to Excel

- Admin Site >Accounting, Class Registration, etc.

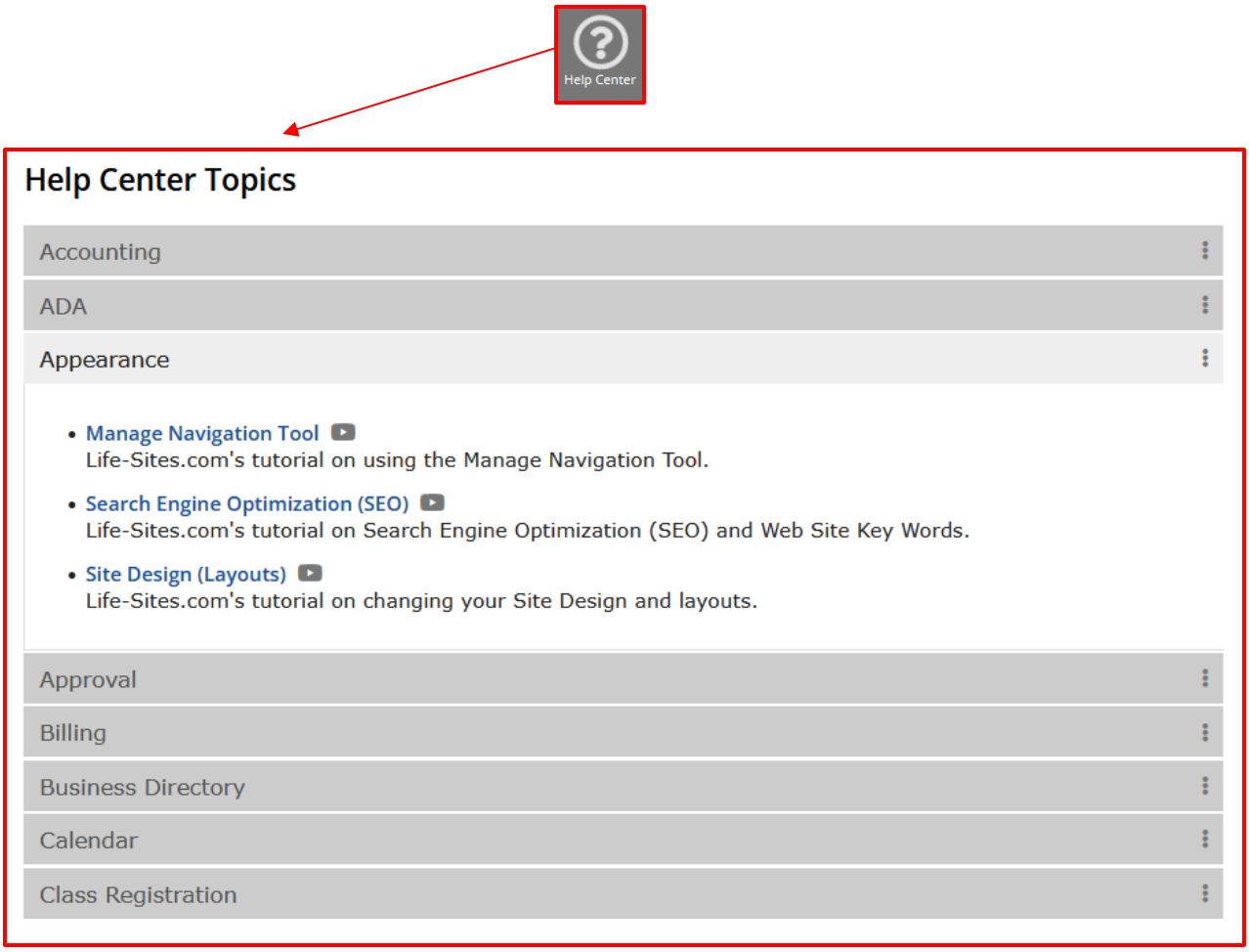
  Look for this Export icon which indicates that download is possible.

VIII. HOW TO LEARN MORE

1) Watch our Instructional Videos available on YouTube

- Admin Site >Admin Home
  >YouTube Channel
  >Subscribe

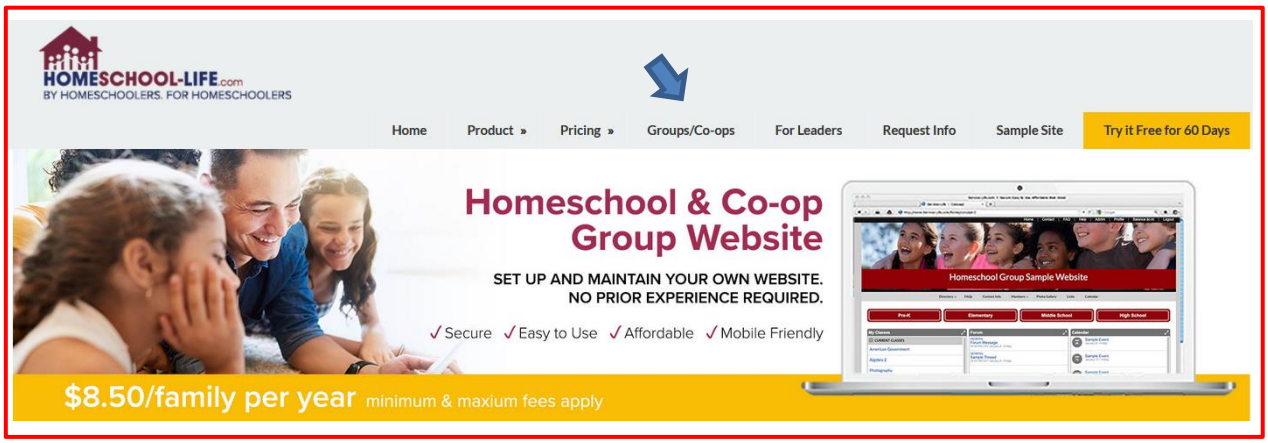
2) Clicking on the Help Center from the Admin Home page will bring you to a list of our YouTube Help videos and our instructional PDFs.

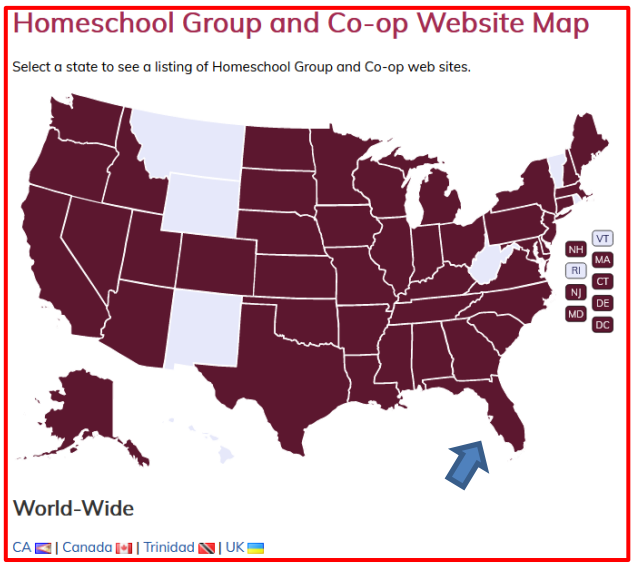


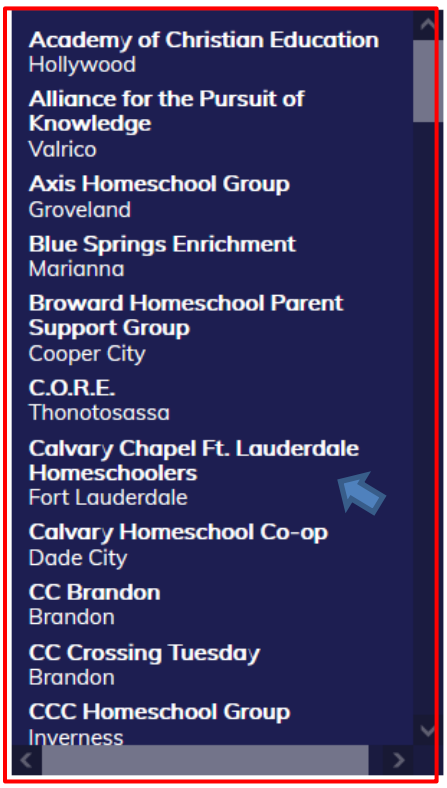
2) Look at the home pages of other groups for ideas—

- www.homeschool-life.com

>Groups/Co-ops

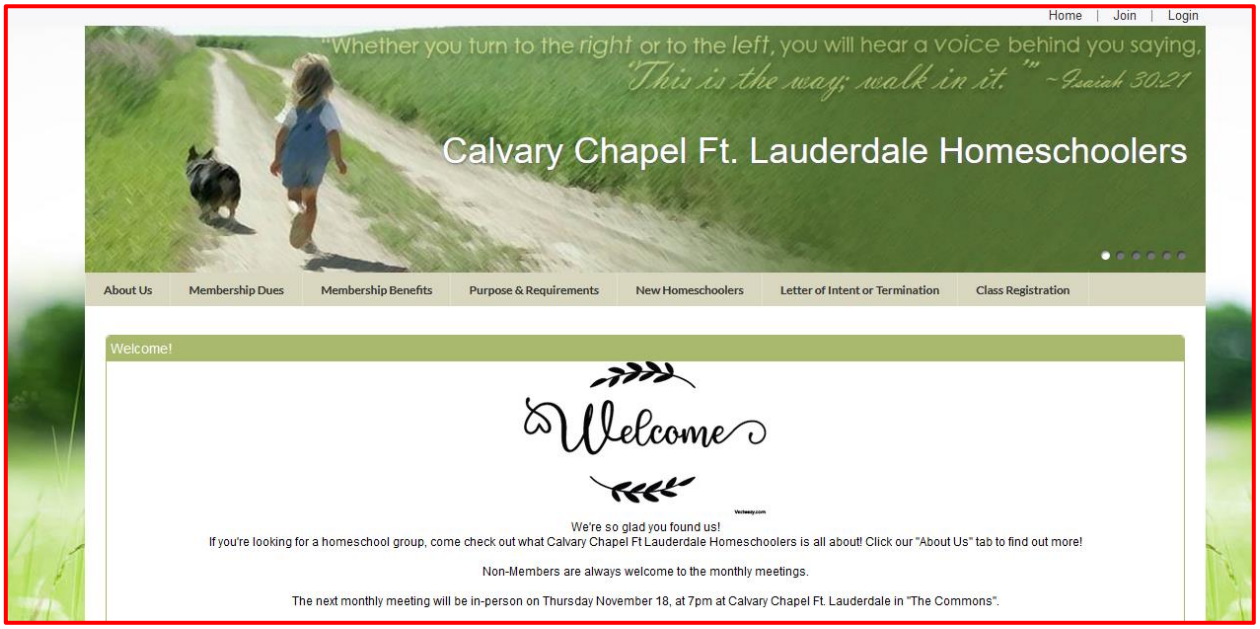






>Click on the state of your choice

>Click on any group to view their public homepage (see next page)



You can also view sample sites by going to your admin home page and clicking on:

>Appearance
>Sample Sites Tab

SITE DESIGN

UPDATE SITE DESIGN

Layouts | Header | Footer | Menus | Styles | Advanced | Sample Sites

TEMPLATE NAME	NUMBER OF GROUPS USING
Education (409)	150
Summer (411)	43
Autumn (412)	41
Beach (401)	36
Thy Word (424)	35
Chalkboard (434)	28
School Supplies (432)	26
Homeschooling (420)	25
Train up a Child (422)	25
Creativity (439)	25
Learning at Home (445)	25
Studying (402)	24
Sunrise (407)	24
Patriotic (405)	21
Blue Sky (425)	21

Clicking on a template name will expand open to groups using that template.

Layouts | Header | Footer | Menus | Styles | Advanced | Sample Sites

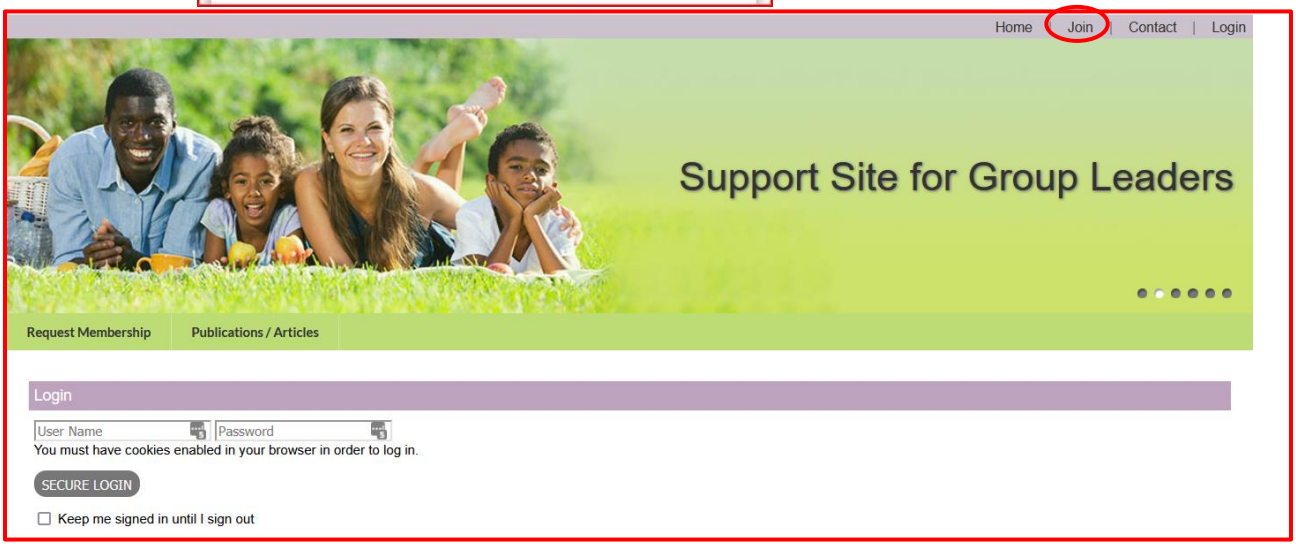
TEMPLATE NAME	NUMBER OF GROUPS USING
Education (409)	150

GROUP NAME	STATE	FAMILIES	WEBSITE
AGAPE Christian Homeschool Organization	Pennsylvania	34	View
Agape FaithWorks	New Jersey	55	View
Albemarle Christian Teaching Support (ACTS)	Virginia	162	View
Alliance Christian Academy	Virginia	106	View
Alliance for the Pursuit of Knowledge	Florida	84	View
Anchor Christian Collaborative	Maryland	84	View

Clicking on View will open a new web browser showing that groups' public home page.

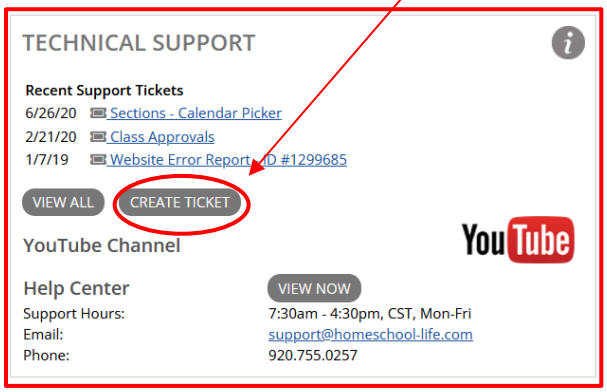
3) Join the Forum for Leaders

- Admin Site >Admin Home
  > Admin Corner (Bottom Right of Page)
  >Forum for Leaders
  >View Now



4) Request Time with a Trainer

- Admin Site >Admin Home
  >Create a Ticket



5) Join us for Webinars, announced through the Support Site for Group Leaders, #3 above.