



# HomeOnTrack

HomeOnTrack

## User Guide

HomeOnTrack.com

HomeOnTrack User Guide  
2018

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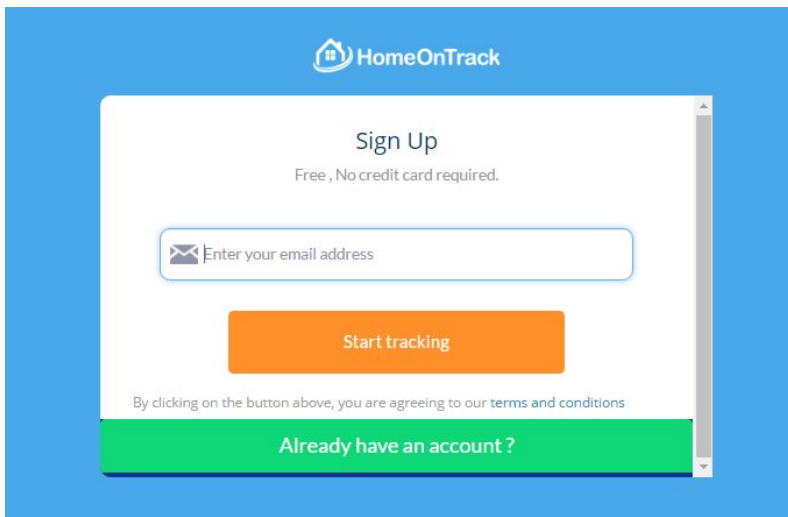
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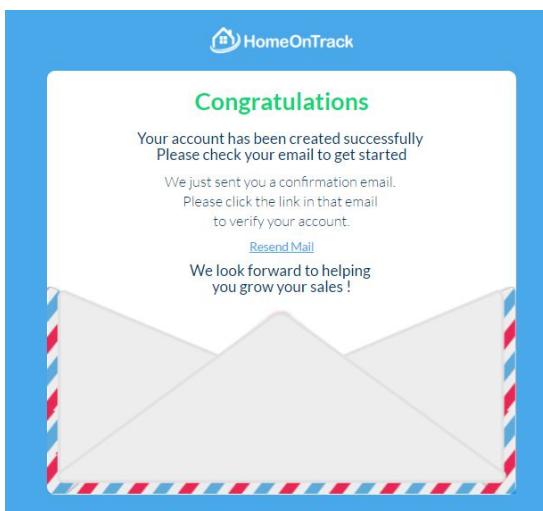
## GETTING STARTED

### Signing Up

From the HomeOnTrack website [homeontrack.com](http://homeontrack.com) choose **Sign Up** from the menu on the homepage. Enter your email address and click Start Tracking.

A screenshot of the HomeOnTrack 'Sign Up' form. The form is white with a blue border. At the top, it says 'HomeOnTrack' with a house icon. Below that, 'Sign Up' is centered, followed by 'Free , No credit card required.' There is a text input field with an envelope icon and the placeholder text 'Enter your email address'. Below the input field is an orange button labeled 'Start tracking'. At the bottom, there is a green button labeled 'Already have an account ?'. A small line of text above the green button reads: 'By clicking on the button above, you are agreeing to our terms and conditions'.

A confirmation message will appear prompting you to check your email to verify your account. Open your HomeOnTrack confirmation email and click on the Confirm Email box.



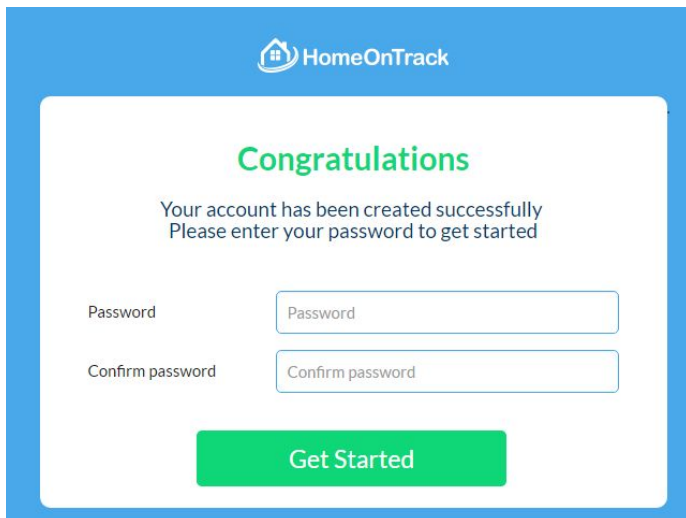
Welcome to Home On Track

To start using your Home On Track account, click the button to confirm your email address:

Confirm Email

*The Home On Track Team*

Set your Password and click Get Started.

The image shows a web interface for HomeOnTrack. At the top, there's a blue header with the HomeOnTrack logo. Below it, a white box contains the text "Congratulations" in green, followed by "Your account has been created successfully" and "Please enter your password to get started". There are two input fields: "Password" and "Confirm password". Below these fields is a green button labeled "Get Started".

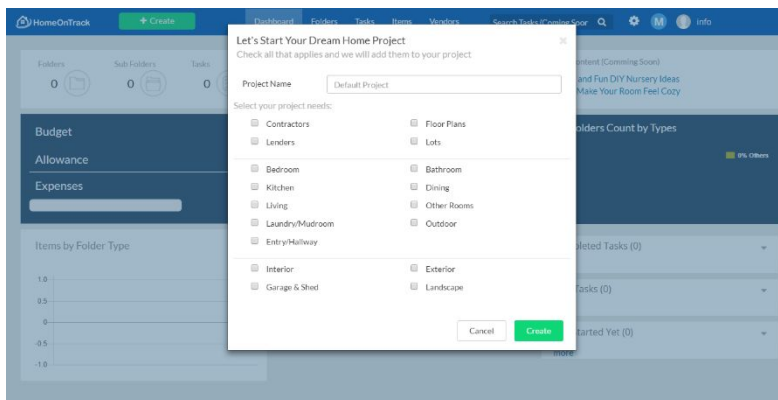
**Note:** Once your Project is created, access your account from HomeOnTrack.com by choosing **Sign In** from the menu bar.

## PROJECT WIZARD

The Project Wizard automatically shows when the initial signup process is complete

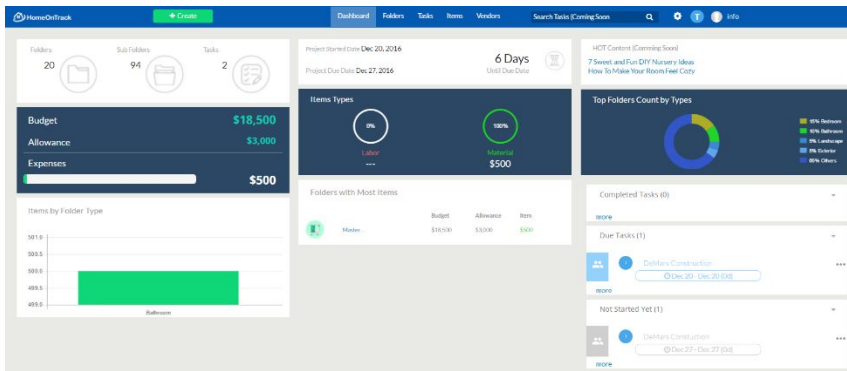
Click on the choices for the rooms you want to manage.

**Note:** You can add more room folders and edit them as needed once your project is setup

The image shows a screenshot of the HomeOnTrack dashboard with a "Project Wizard" dialog box open. The dialog box has a title "Let's Start Your Dream Home Project" and a subtitle "Check all that applies and we will add them to your project". It features a "Project Name" field with "Default Project" entered. Below this, there's a section "Select your project needs:" with a grid of checkboxes. The checkboxes are organized into two columns. The first column includes: Contractors, Lenders, Bedroom, Kitchen, Living, Laundry/Mudroom, Entry/Hallway, Interior, and Garage & Shed. The second column includes: Floor Plans, Lots, Bathroom, Dining, Other Rooms, Outdoor, Exterior, and Landscape. At the bottom of the dialog box are "Cancel" and "Create" buttons. The background shows the HomeOnTrack dashboard with various sections like Budget, Allowance, Expenses, and a chart titled "Items by Folder Type".

## YOUR DASHBOARD

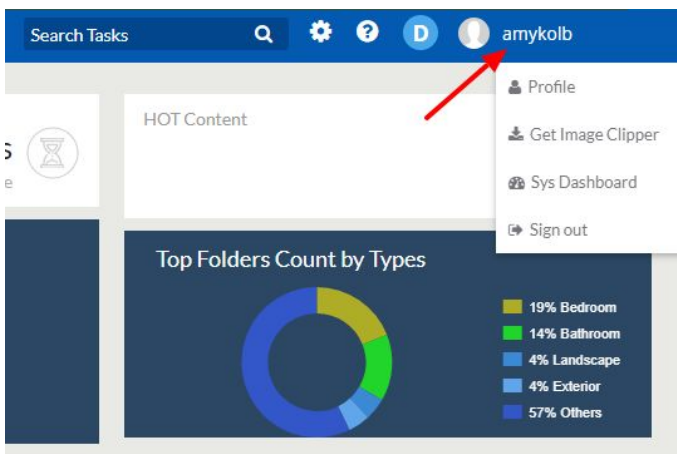
The Dashboard is a quick reference snapshot of your entire project. It's a great way to quickly keep an eye on your Budget and Tasks as your project progresses.



## GET IMAGE CLIPPER

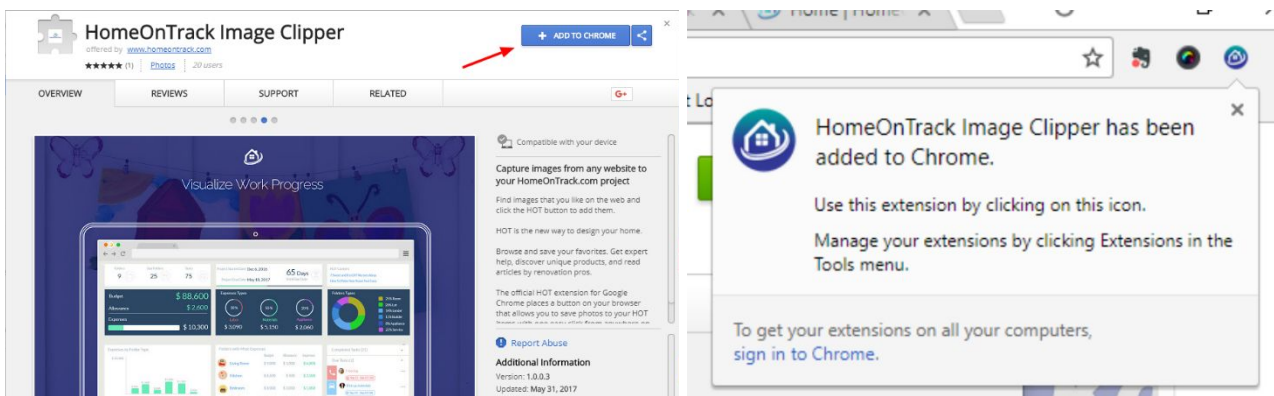
The easiest way to add product images to your project is with the **HomeOnTrack Image Clipper**. We recommend installing this right after finishing the Project Wizard

1. Hover over your name at the far right of the menu bar. A drop down menu will appear



2. Click Get Image Clipper
3. You'll be taken to the Chrome webstore. Click ADD TO CHROME
4. Your Image Clipper will appear in the top right corner of your browser

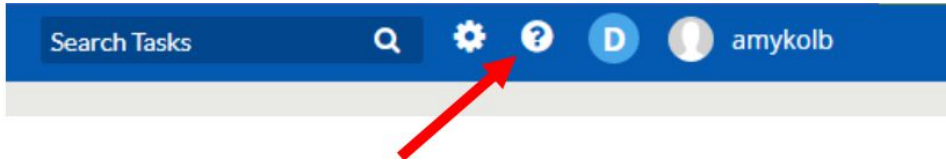
**Note:** We will cover how to use your Image Clipper in the Folder Section



[Click Here](#) if you'd like to view **Image Clipper Video Tutorial**

## HELP AND TUTORIALS

Click on the **?** in the menu bar to access HomeOnTrack Tutorials and FAQs



## SETTINGS

You can also watch the **Settings Video Tutorial**, [Click Here](#).

You'll need to indicate general Setting for your project. Click on the Settings icon located on the menu bar.



### Personal

**Your Profile:** Fill in your personal information here. Note you must choose your **Task Reminder** time and your **Role**.

**Task Reminder:** Indicate what time you'd like to receive email reminders of due tasks.

**Role:** Different roles grant different levels of access to the project. The choices for your Role (most likely Admin) and for those you invite to your project are:

**Admin:** Full Access to full program. Also the only level that can:

1. Create, delete & share a first-level folder.
2. Share folders with managers, users or both.
3. Change project settings

**Manager:** Able to access all but Budget. Can create sub-folders, edit anything under folders (shared with him/her) including tasks and expenses

**User:** Can **View** sub-folders with all notes, images and files.

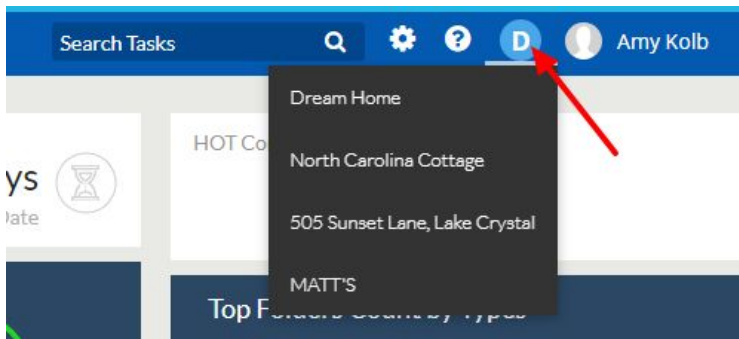
Can add notes, images and files.

Can not see expenses

Can see their own tasks only with ability to change its status to complete but not to edit anything in the task.

**Change Password:** You can change your password at any time

**Default Project:** Indicates which Home is your primary residence. The first initial of your default project will appear in the menu bar. If multiple projects show here, you've been invited and have access to others' projects. You can toggle between those projects – they'll appear in a drop-down window when you hover over the initial in the menu bar.

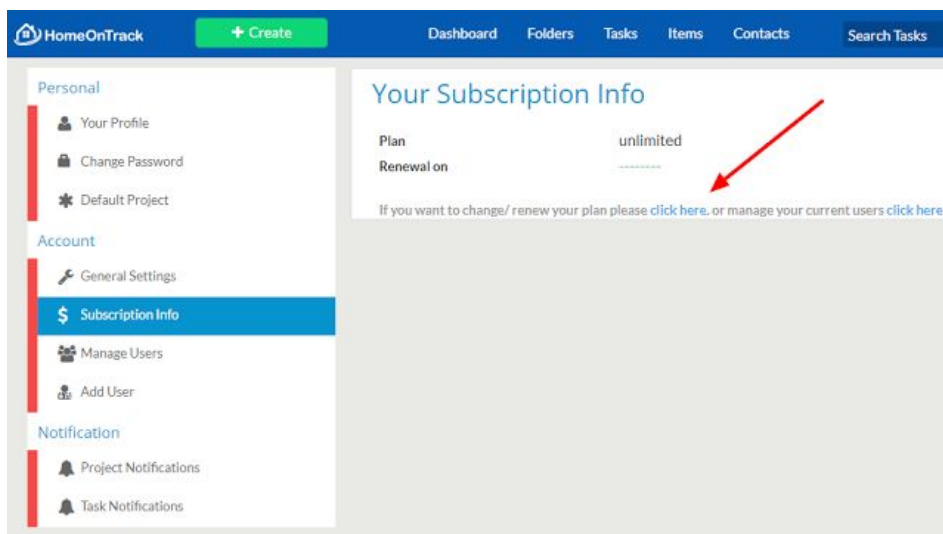


## Account

**General Settings:** Set Time Zone, Currency and Name your Project if you skipped this step in the Project Wizard

**Subscription Info:** You'll choose your HomeOnTrack Subscription Level/Payment Plan. [Click Here](#) for More information about Payment Plans.

Click Subscription Info to review details of your Plan and make any updates or changes at any time. To access your detailed subscription information hit click here.



Your Subscription Information will look like this. You can easily change between Pricing Plans in this window.



Hello janetbusby

your current plan: unlimited

Pricing Details :
unlimited

☐ Full (monthly)
\$ 16
[Learn More](#)

☐ Full (semi-annual)
\$ 80
[Learn More](#)

☐ Full (annual)
\$ 144
[Learn More](#)

☐ Read-only
\$ 2
[Learn More](#)

Change billing information

Proceed

**Manage Users:** This is a list of your Home Management Users. You are listed here along with those you have invited to your account. You can add a User in this view by clicking the green Add User button or in the Add User Window

**Add Users:** Add or invite other people to work with you to manage your home. Fill in their contact information, designating their **Role** (Role access levels are listed above). Once this information is saved, an invitation email will be sent to your new User and they will be easily prompted through the sign in process.

You can also watch the **Managing Users Video Tutorial**. [Click Here](#)

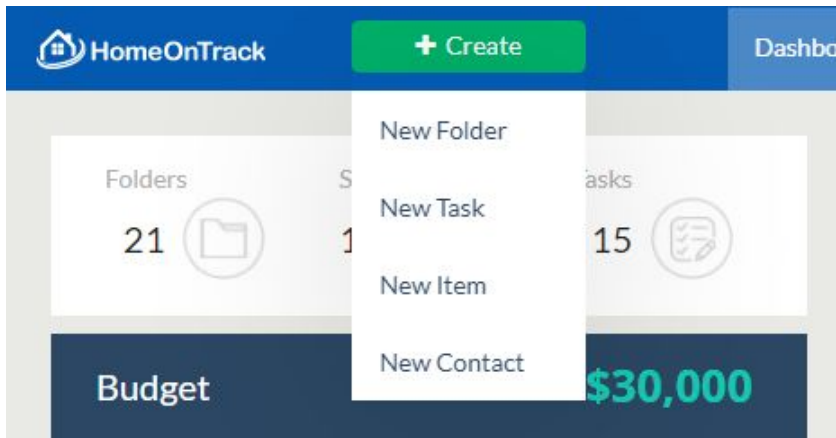
### Notification

**Project Notifications:** Choose to send project owner and admins an email if project start dates or end dates change.

**Task Notifications:** Control which Task Reminders are sent to your Account Users

## CREATE NEW

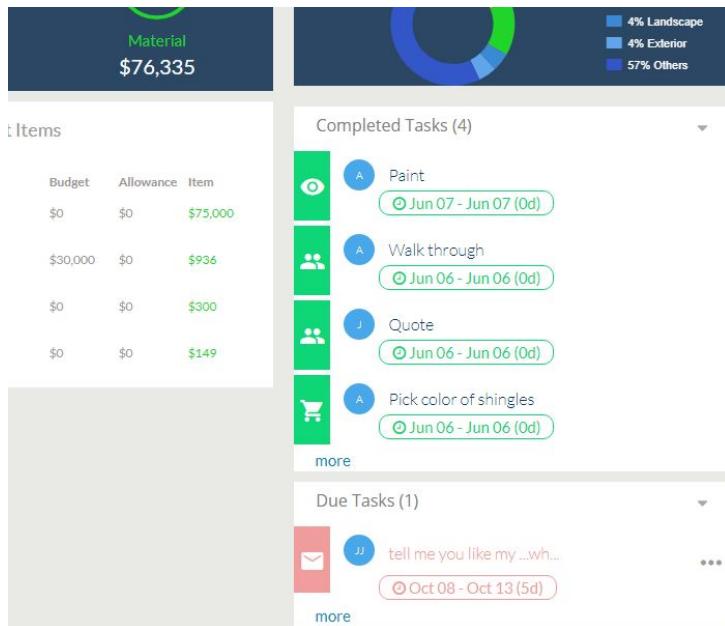
We'll cover how to create a New Folder, Task, Item or Contact within those sections, but note that any of those features can be created by clicking the green **+ Create** button in the menu bar.



## TASKS

HomeOnTrack's powerful **Task** function lets you schedule tasks and send reminders to keep you home in its best shape. Set Tasks for yourself or for the Users you've added to help manage your home. Email reminders are then sent until the Task is marked completed. You'll be able to view all your Tasks on the Dashboard for a quick reference to keep your home organized and maintained.

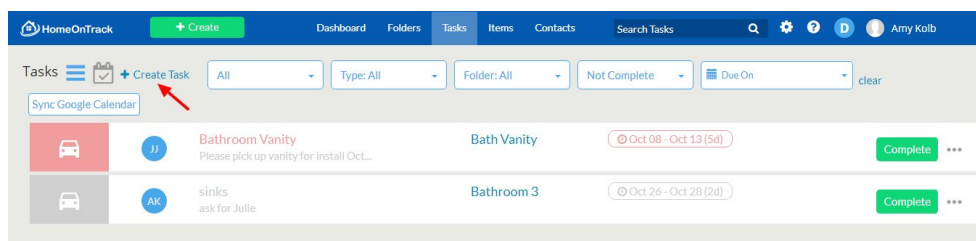
You can also view the **Tasks Video Tutorial**, [Click Here](#).

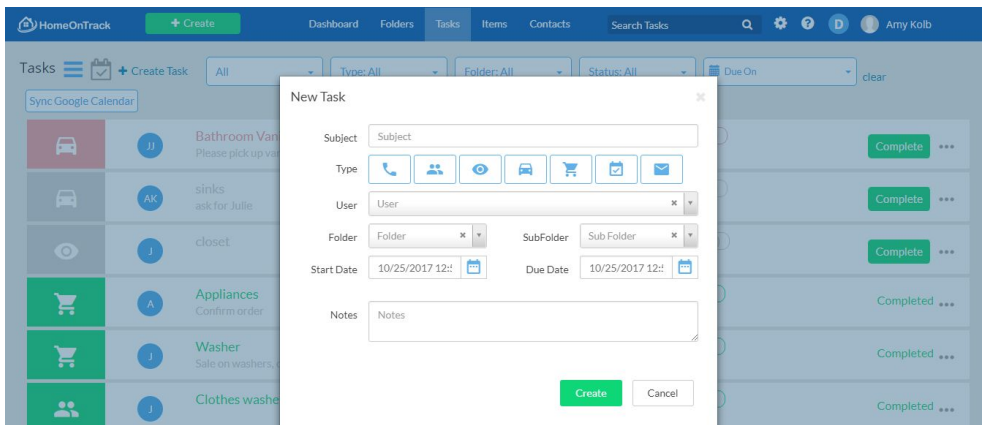


## Create, Edit and Assign a Task

Your Tasks are also located in the list view by clicking on **Tasks** on the menu bar.

From the Task list, click on **+ Create Task** and the New Task window will appear. Fill in the details and click Create to save.





**Subject:** Name your task, usually by the Product associated with it.

**Type:** Specify which Type of Task it is. Hover over the icons to see your choices; Call, Meeting, Pickup and so on.

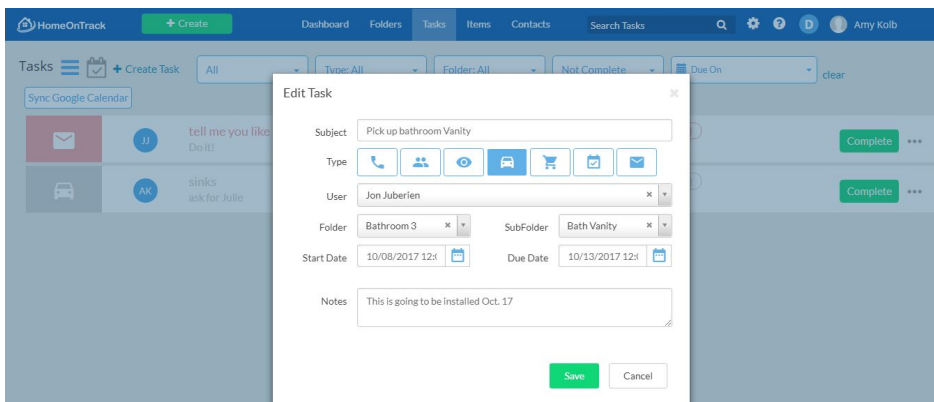
**User:** Choose which User to assign the Task to from the dropdown. Users are added in Project Settings. Add a new User in Settings if needed. See Settings section instructions on how to add a User.

**Folder & Sub Folder:** Indicate which Folder and Sub Folder (Room or Product) this Task is associated with.

**Start Date & Due Date:** Set the Task Start Date and Due Date

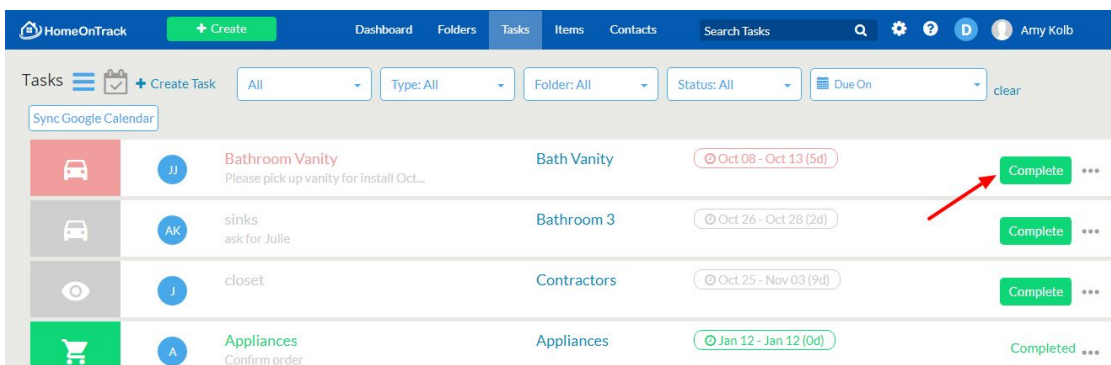
**Notes:** Add any Notes to your Tasks here to clarify what needs to be done.

You can **Edit** your Tasks by clicking on the ... in the list view and making changes in the pop up window.



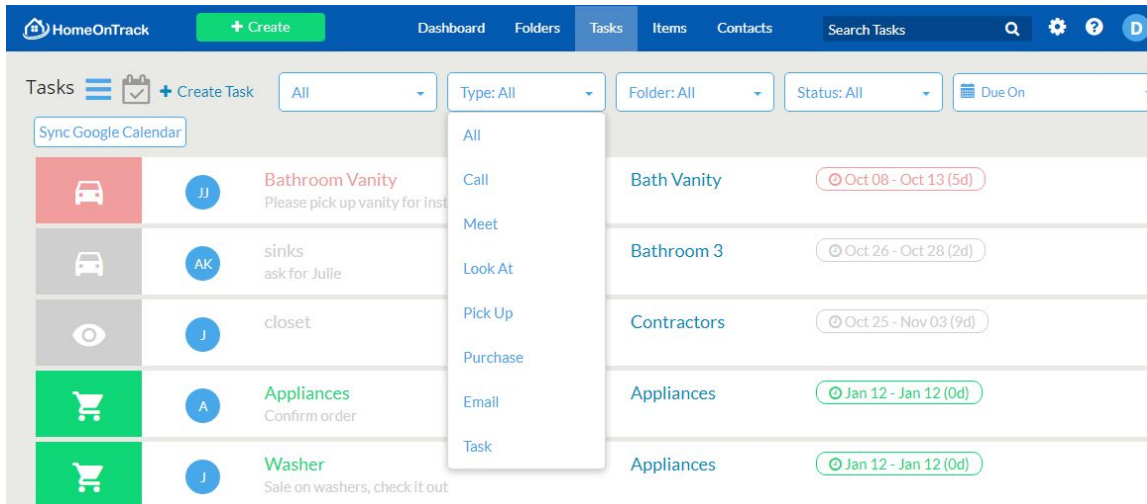
## Reminders and Completing Tasks

Once your Task has been created, Email Reminders will be sent to the User the Task was assigned to until they mark the Task complete by clicking the green **Complete** button in the Task listing.



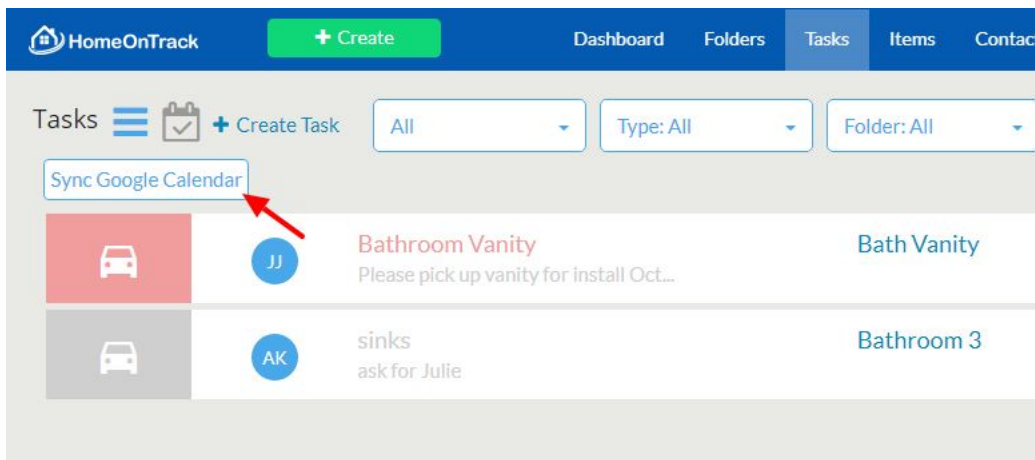
## Sort Tasks

From the Task list you can sort Tasks several ways by choosing from the drop down of each section.



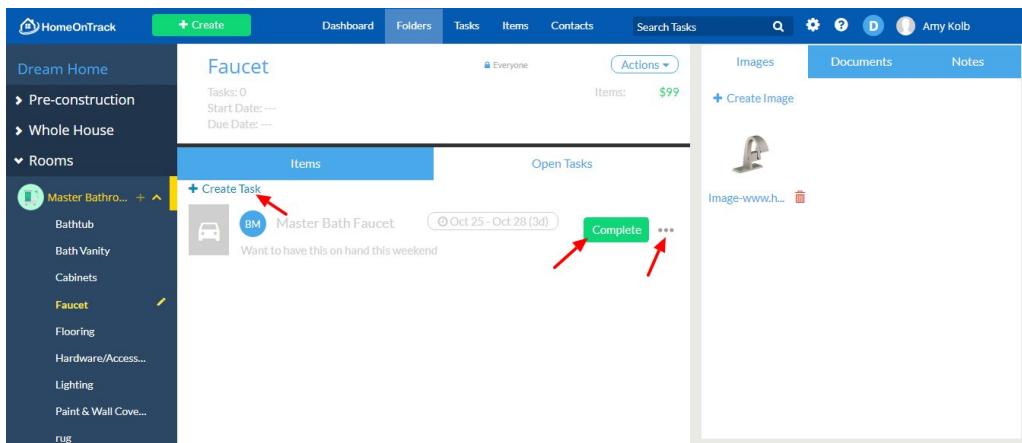
## Sync Tasks with Google Calendar

Sync Tasks with your Google Calendar by hitting the Sync Google Calendar button.



## Task in Folder View

Your Tasks are also found in your Folder view. From here you can **Create** a new task, **Complete** a task or **Edit** a task. This new or edited Task will appear in the list view, as well.



## CONTACTS

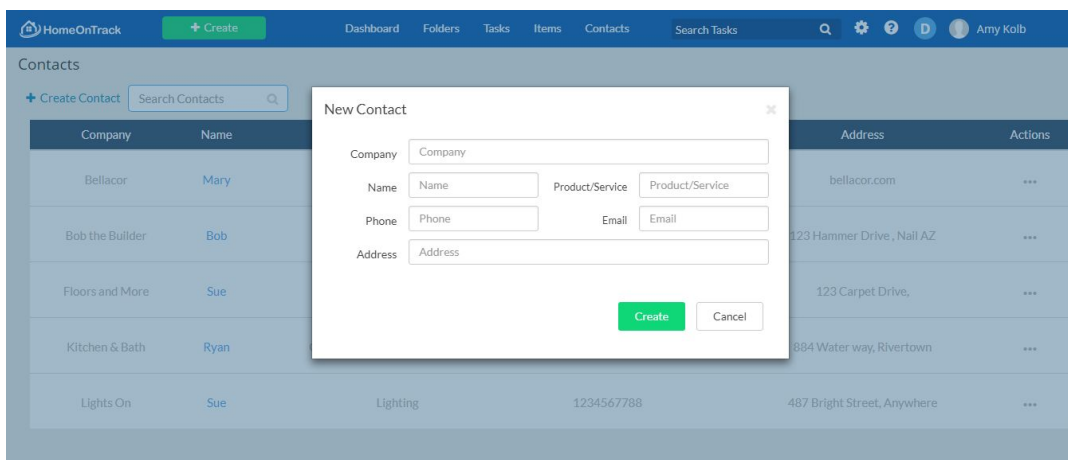
Add contact information to HomeOnTrack for anyone you hire to do work on your home, to suppliers or stores you've purchased materials from and beyond. If you already have contacts to add, we suggest doing so before you begin adding Items to your Folders.

When you create an Item, you can indicate the Contact associated with each Item. When Contacts are preloaded into your program, you can link a Contact right when you create an Item (creating an Item is described in the Folder section). You can, of course, add Contacts at any time.

[Click Here](#) to view the **Contacts Video Tutorial**

### Create a Contact

Click on Contacts in the top menu bar. From that section click on **+ Create Contact**. Fill in all the information for your new Contact and hit Create when complete.



Here's what your list of Contacts will look like. You can Edit Contacts by clicking on the ■■■ in the list view.

Company	Name	Product / Service	Phone	Email	Address	Actions
Bellacor	Mary	lighting, decor			bellacor.com	...
Bob the Builder	Bob	Contractor	5555555555		123 Hammer Drive, Nail AZ	...
Floors and More	Sue	Flooring	5555555555		123 Carpet Drive,	...
Kitchen & Bath	Ryan	Cabinets, counters, tubs & faucets	3659875241		884 Water way, Rivertown	...
Lights On	Sue	Lighting	1234567788		487 Bright Street, Anywhere	...

## Contact Profile

Click on the highlighted Contact **Name** in your list view and you're able to create a complete profile for that Contact including Images, Documents and Notes. For instance, you may want to upload a photo of a completed remodel project a contractor has done. The section explaining how to add Images, Documents and Notes is below in the Folders section. This is also a perfect place to upload your overall bid from a lighting showroom, for instance, so you have the pricing for the entire scope of your project.

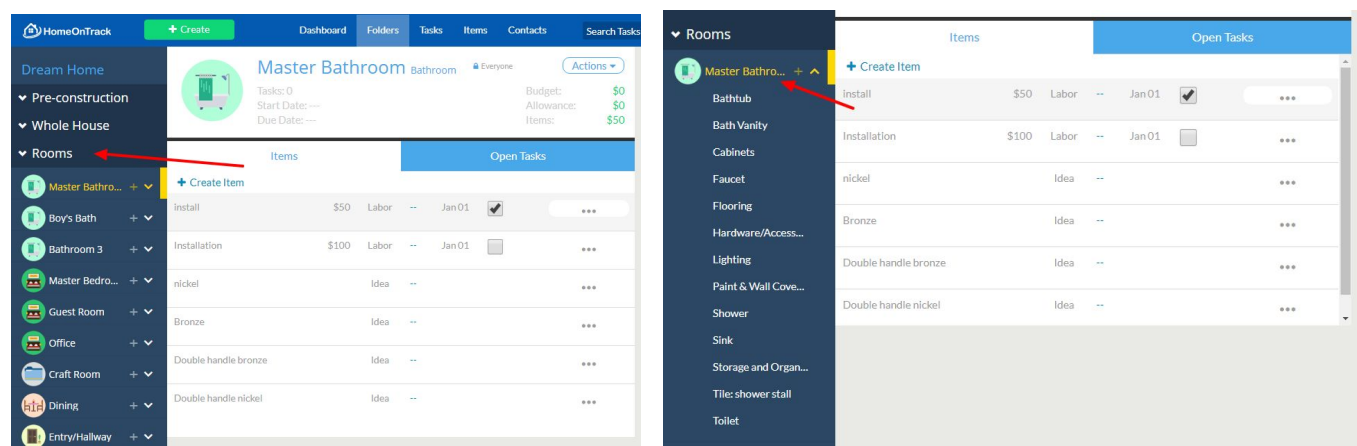
**Note:** You're able to upload or drag and drop images into Contact Profiles from your computer. The HOT Image Clipper does not load images into Contacts.

## FOLDERS

The HomeOnTrack Folders are the hub of your Home. All products (Items) found in your home or those you purchase are stored here according to Room. You can upload images of these products along with pertinent information such as the price and supplier of your Items. Your Folders are also where you can record Notes pertaining to each product you enter. You can also set your Budget and assign Tasks from within your Folders. Let's get started ...

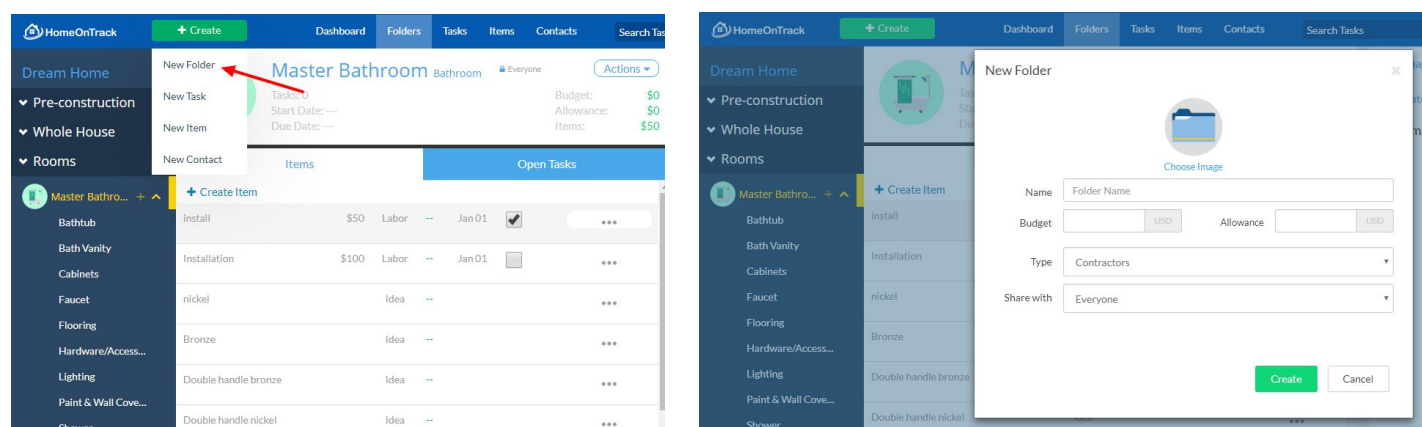
You can also watch the **Folders Video Tutorial** [Here](#)

**Folder Basics:** Your Folders and Sub Folders were pre-populated when you filled in your Project Wizard. You'll see all the Folders you chose along the left sidebar in the Folder view. When you click on the drop-down arrow you'll see typical products found in each **Folder** (or Room) are already included, these are your **Sub Folders**.

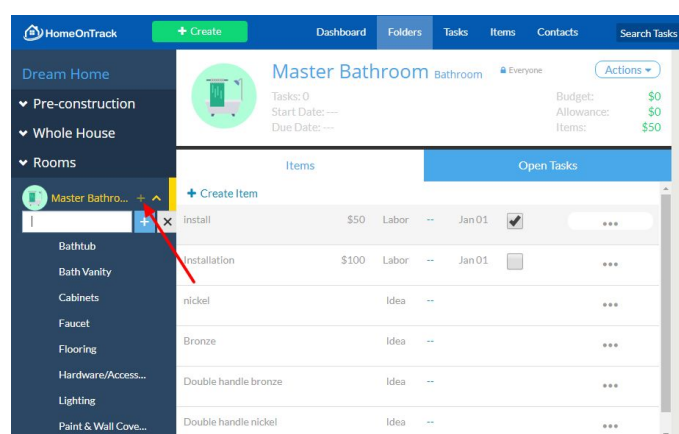


## Editing Folders

**Add a New Folder:** To add a new Folder click on the green + Create button and choose Folder from the drop down menu. Fill in the Folder properties in the window and click Create to save.



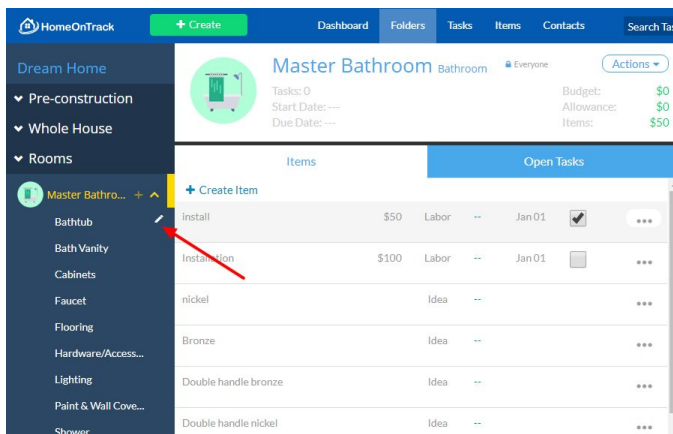
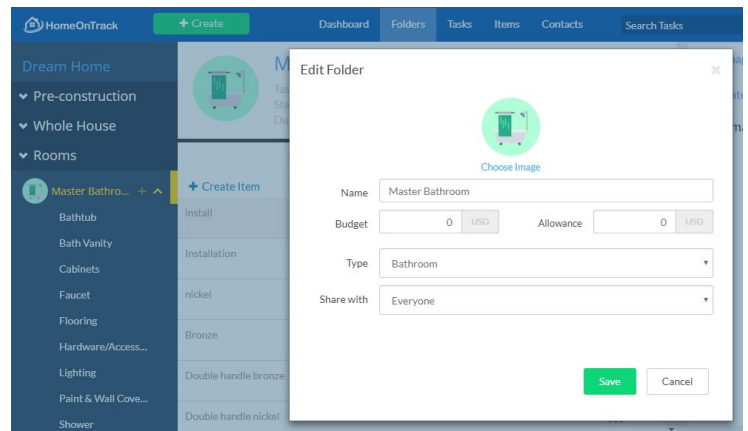
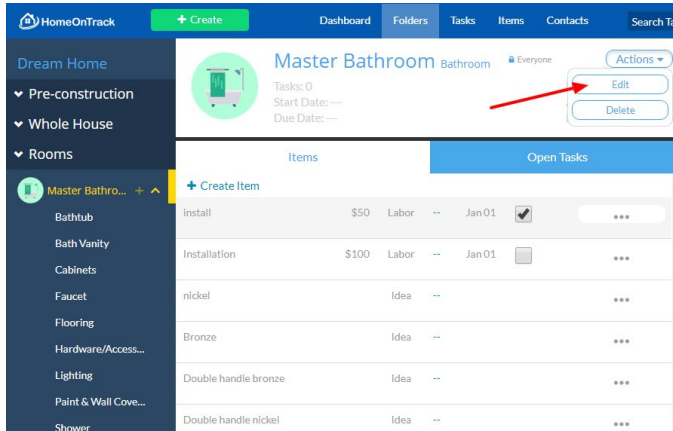
**Add a new Sub Folder (product) to a Folder:** Click on the + next to the Folder name. You will be prompted to name your Sub Folder and hit + to add.





**Change a Folder Name.** You may choose to rename a Folder when designating a Bedroom to a specific child, for instance. Click the Actions button and go to Edit in the drop down menu. Type in the new name.

**Change a Sub Folder Name:** When in a Sub Folder you can again hit the Actions button to change the name or hit the Edit icon next to the Sub Folder name, you'll be prompted to type in the new name and save.

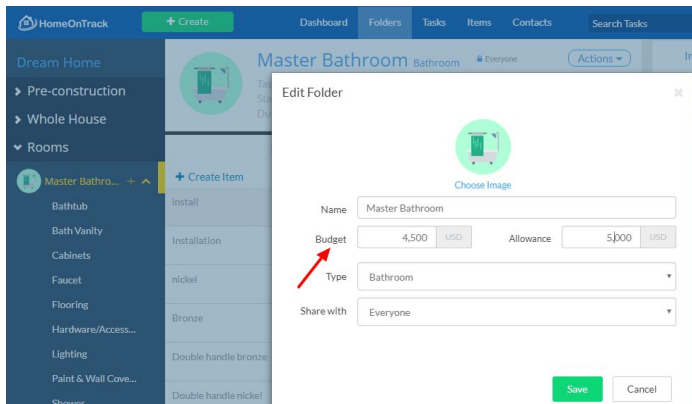


## Set Your Budget

Set a Budget for each Folder (Room) for your project. This again is done by clicking the Actions button and choosing Edit from the drop down. Fill in the **Budget** you have set for this room and also add the **Allowance** amount if a contractor has set one for you. This Allowance number is how a contractor bids a job for you. You may actually choose to go over or under this amount, which is your project Budget. If a contractor isn't involved in your project you can leave Allowance blank.

As you make your final selections from the Items you add to your Folders (Items are discussed next), your Budget will accrue. Remember you can also view your overall budget as it accrues in the Project Dashboard.



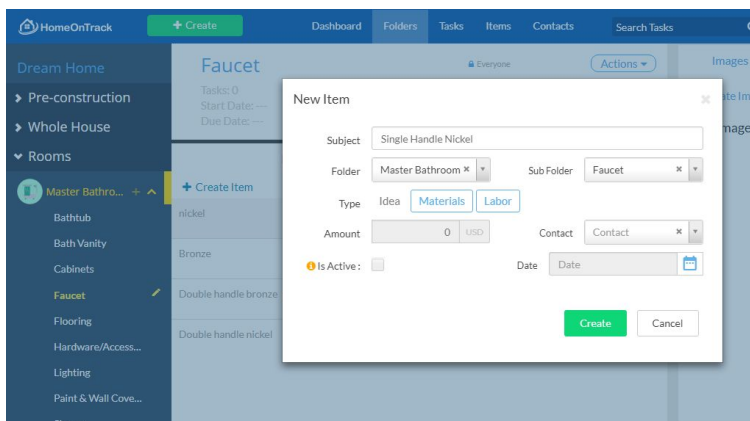
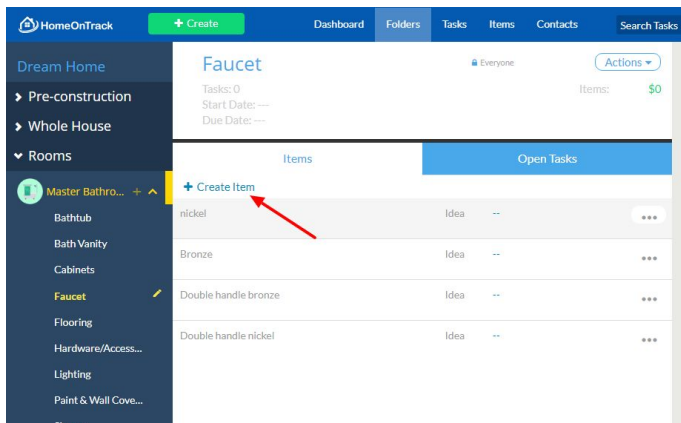


[Click Here](#) to view the **Budget Video Tutorial**

## Create an Item

Each product found in your home or anything you purchase can be added to your Folders by adding an **Item** to your Sub Folders. You may be choosing between several faucets for your Master Bath, so you'll add each of those to your Faucet Sub Folder for your Master Bath and so on. We'll use this product as an example here.

In your Faucet Sub Folder click **+ Create Item**.



**Subject:** Name your Items.

**Designate Folder and Sub Folder the Item belongs to.** This will pre-populate from your Sub Folder view

**Type:** Indicate whether this is an Idea, Material or Labor

Idea: An Item you like, or an inspiration Item

**Material:** Choose this option when you know the price of this Item

**Labor:** Choose this when the cost is for the Labor to install the Item

**Amount:** Fill in the price of the Item if known

**Contact:** Choose a Contact from the drop down menu. These choices are those you've already added to your Contact list. If you still need to add a Contact for this Item you can still create the Item and add the Contact later.

**Date:** Enter the Date you located the Item

**Is Active:** You may want to leave this un-checked if you're still choosing between Items. You will check this later once your final selection has been made. Your Active Items will accrue to your Project Budget.

Hit **Create** to save the Item. Your Item will now show in your Sub Folder. In addition to every new Item showing in your Sub Folders, all items from each Sub Folder will also show in the main Folder, in this case Master Bath. This allows all Items for that entire Room to be viewed together.

The screenshot shows the HomeOnTrack application interface. The top navigation bar includes 'HomeOnTrack', a '+ Create' button, and tabs for 'Dashboard', 'Folders', 'Tasks', 'Items', 'Contacts', and 'Search Tasks'. The left sidebar shows a navigation menu with 'Dream Home' at the top, followed by 'Pre-construction', 'Whole House', and 'Rooms'. Under 'Rooms', 'Master Bathro...' is selected, showing a list of sub-items: 'Bathtub', 'Bath Vanity', 'Cabinets', 'Faucet' (highlighted with a yellow bar and a pencil icon), 'Flooring', 'Hardware/Access...', 'Lighting', 'Paint & Wall Cove...', and 'Shower'. The main content area is titled 'Faucet' and shows 'Tasks: 0', 'Start Date: ---', 'Due Date: ---', and 'Items: \$0'. Below this is a table with two columns: 'Items' and 'Open Tasks'. The 'Items' column lists various faucet options: 'nickel', 'Bronze', 'Double handle bronze', 'Double handle nickel', and 'Single Handle Nickel'. The 'Open Tasks' column shows 'Idea' for the first four items and 'Material' for the last item. A red arrow points to the 'Single Handle Nickel' item. The 'Single Handle Nickel' item has a price of '\$99' and a date of 'Oct 23'.

Items	Open Tasks
nickel	Idea
Bronze	Idea
Double handle bronze	Idea
Double handle nickel	Idea
Single Handle Nickel	Material

## Edit an Item

Once you've created an Item you can Edit it at any time. Click on the ... in the Item listing and a hit Edit in the drop down. A window will open and your edits can be made.

**Faucet**

Tasks: 0  
Start Date: ---  
Due Date: ---

Items: \$99

Items		Open Tasks	
+ Create Item			
nickel	Idea	--	...
Bronze	Idea	--	...
Double handle bronze	Idea	--	...
Double handle nickel	Idea	--	...
Single Handle Nickel	\$99	Material	-- Oct 23 <input checked="" type="checkbox"/> ...

Edit  
Delete

## Add an Image

Click to highlight the Item you're adding an Image to. Then click **+ Create Image** in the area to the right of the Items list.

**Faucet**

Tasks: 0  
Start Date: ---  
Due Date: ---

Items: \$0

Items		Open Tasks	
+ Create Item			
nickel	Idea	--	...
Bronze	Idea	--	...
Double handle bronze	Idea	--	...
Double handle nickel	Idea	--	...
Single Handle Nickel	\$99	Material	-- Oct 23 <input type="checkbox"/> ...

+ Create Image  
No images were found

You can now drag and drop an Image saved on your computer or click to upload an Image from your computer.

**Faucet**

Tasks: 0  
Start Date: ---  
Due Date: ---

Items: \$0

Items		Open Tasks	
+ Create Item			
nickel	Idea	--	...
Bronze	Idea	--	...
Double handle bronze	Idea	--	...
Double handle nickel	Idea	--	...
Single Handle Nickel	\$99	Material	-- Oct 23 <input type="checkbox"/> ...

+ Create Image  
No images were found

Drop files here or click to upload  
Close

max upload file size is 500 MB.

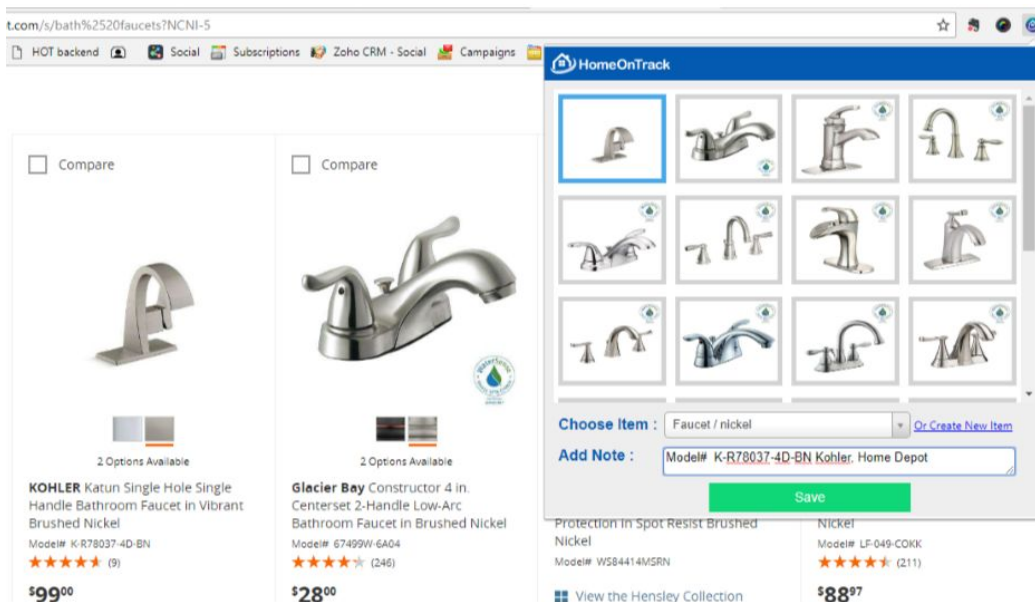
You can also insert Images into your Sub Folders using your **HOT Image Clipper** you installed when you set up your Project. This is a terrific way to Pin images from anywhere on the internet directly into your Project!

You can view the **Image Clipper Video Tutorial** [Here](#)

### Using the HOT Image Clipper:

When you're out browsing the web for products and see something you want to add to your Home, simply click on the Image Clipper Icon at the stop right of your Browser menu. If you haven't installed the Image Clipper yet, see the instructions earlier in this guide.

Once you click your Image Clipper icon, a window will appear with every product from the current page showing. Click on the particular product you'd like to add to your project. To "Choose Item" click the drop down menu to locate the Item you have already created in your Sub Folder, in our case Single Handle Nickel. If you have not yet created a specific Item for this product in your Project, click "Or Create A New Item." This will prompt you through designating which Sub Folder you want this Item to load into. Be sure to add any notes, for instance, brand and model number. Hit Save and your Image will automatically appear in your HOT Program.



Here's that same Item in your Faucet Sub Folder along with the website the image was pinned from and any notes you added to the Image.

**Dream Home**

- Pre-construction
- Whole House
- Rooms
  - Master Bathro... + ^
  - Bathtub
  - Bath Vanity
  - Cabinets
  - Faucet**
  - Flooring
  - Hardware/Access...
  - Lighting
  - Paint & Wall Cove...
  - Shower

**Faucet**

Tasks: 0  
Start Date: ---  
Due Date: ---

Items: \$0

Items		Open Tasks	
+ Create Item			
nickel	Idea	--	...
Bronze	Idea	--	...
Double handle bronze	Idea	--	...
Double handle nickel	Idea	--	...
Single Handle Nickel	\$99	Material	-- Oct 23 <input type="checkbox"/> ...

**Images** | Documents | Notes

+ Create Image

Image-www.h...

## Make an Item Active

Once all your product choices (Items) have been added to your Sub Folders and you've made your final selection, mark the **Active Box**. This will indicate your final selection and the price of this Item will be added to your overall Project Budget in the main Master Bathroom Folder.

**Dream Home**

- Pre-construction
- Whole House
- Rooms
  - Master Bathro... + ^
  - Bathtub
  - Bath Vanity
  - Cabinets
  - Faucet**
  - Flooring
  - Hardware/Access...
  - Lighting
  - Paint & Wall Cove...

**Faucet**

Tasks: 0  
Start Date: ---  
Due Date: ---

Items: \$99

Price appears in Budget

Items		Open Tasks	
+ Create Item			
nickel	Idea	--	...
Bronze	Idea	--	...
Double handle bronze	Idea	--	...
Double handle nickel	Idea	--	...
Single Handle Nickel	\$99	Material	-- Oct 23 <input checked="" type="checkbox"/> ...

**Images** | Documents | Notes

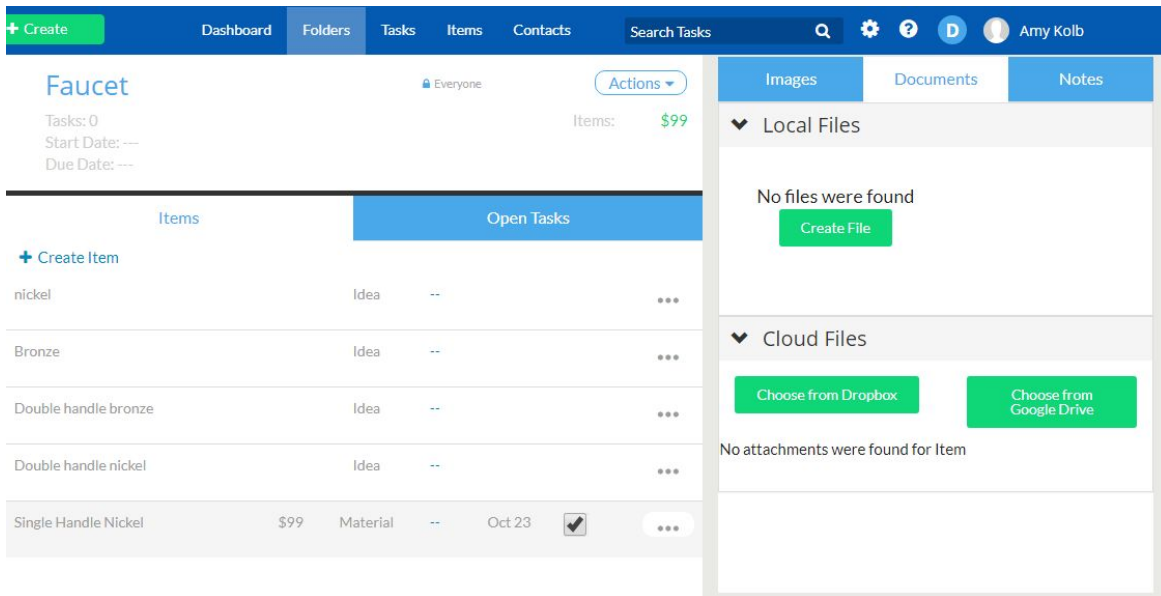
+ Create Image

Image-www.h...

Selected Product is Active

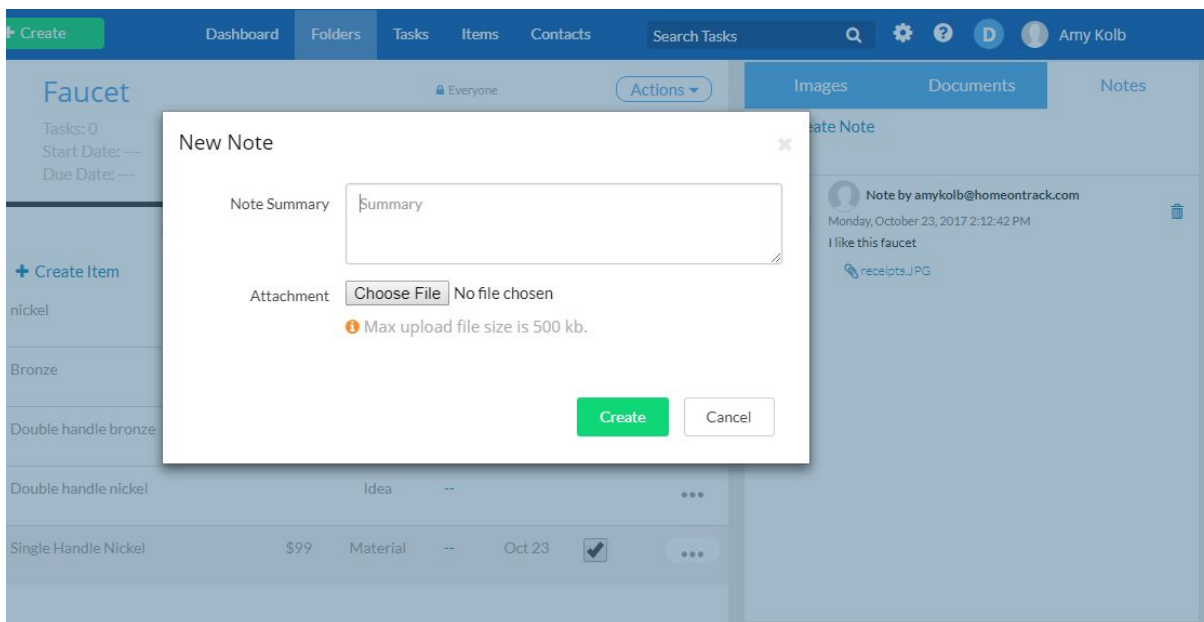
## Add Documents

Add Documents to your Items such as warranty information and owner manuals.



## Add Notes

Add Notes to your Items to keep a record of the Product details and any pertinent information. Click **+ Create Note**. This is also a perfect place to upload receipt images as an attachment once the Item is purchased.



## Item List View

You can also view a complete list of all the Items for your Project in the Item List View. All your items can be sorted in a variety of ways for your convenience. You can easily access the Folder or Contact for each Item by clicking on the blue highlighted word.

Subject	Folder	Amount	Type	Contact	Date	Active	Actions
Single Handle Nickel	Master Bathroom	\$99	Material	--	Oct 23, 2017	Yes	...
brown tile	Entry/Hallway	\$1,000	Material	Bob the Builder (Bob)	Oct 08, 2017	No	...
Developer	Lots	\$75,000	Material	--	Mar 20, 2017	Yes	...
Vanity Light	Laundry/Mudroom	\$150	Material	--	Jan 01, 0001	No	...
tub	Dining	\$300	Material	0	Jan 01, 0001	Yes	...

## PROJECT START AND DUE DATES

If you're tackling a home project you can set your Project Start and Due Dates by clicking the green **+ Create** button in the menu bar and choosing **New Task**. Fill in the details in the window. We suggest the following:

**Subject:** Project Timeline

**Type:** Choose the Tasks icon

**User:** Choose yourself as the User

**Folder:** You can assign this to any Folder you created in your Project Wizard, no need to choose Sub Folder

Fill in the **Start Date** and **Due Date** of your Project. This can be edited at any time. Possibly give yourself a deadline you want the Project completed by such as the holidays.

**Notes:** Leave this blank if you choose

Click Create to save and your Project Timeline will appear in your Dashboard. You'll now have a countdown to how many days until your Project Due Date.

**Note:** Any new Task created during your project with a later Due Date than your Project Timeline Task will extend your Project Due Date on the Dashboard.

Subject: Project Timeline

Type: [Task Icon]

User: Amy Kolb

Folder: Contractors SubFolder: Sub Folder

Start Date: 06/01/2017 1:2 Due Date: 12/31/2017 1:2

Notes: Notes

Create Cancel

Project Started Date Jan 12, 2017

Project Due Date Nov 03, 2017

8 Days

Until Due Date

