Getting Started

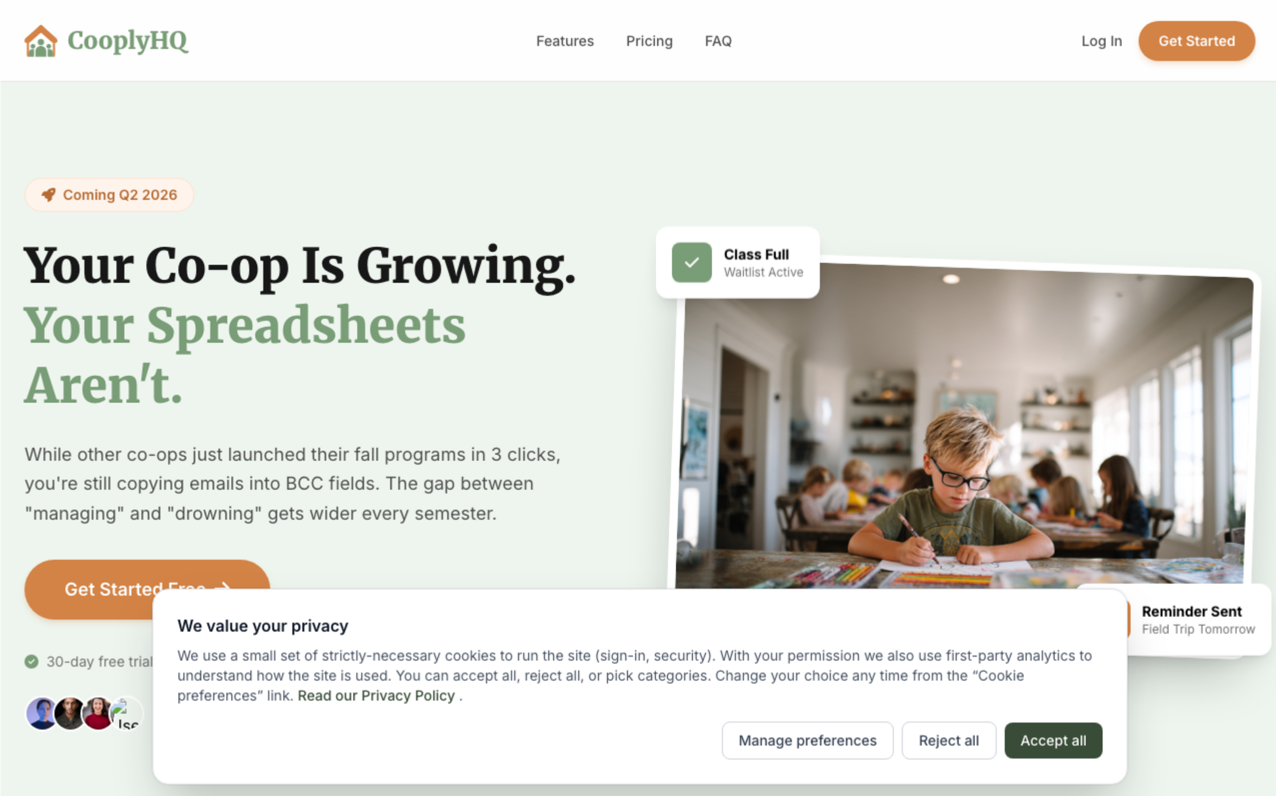
Learn how to set up and use CooplyHQ for your homeschool co-op

Create a CooplyHQ Account

Get your homeschool co-op online in minutes by creating a CooplyHQ account.

Steps

1. Go to cooplyhq.com and look for the "Get Started" button on the home page.



2. Enter your email address and create a secure password.
3. Agree to the Terms of Service and confirm your email address by clicking the link sent to your inbox.
4. You're now logged in to your CooplyHQ dashboard and ready to set up your co-op.

What's next

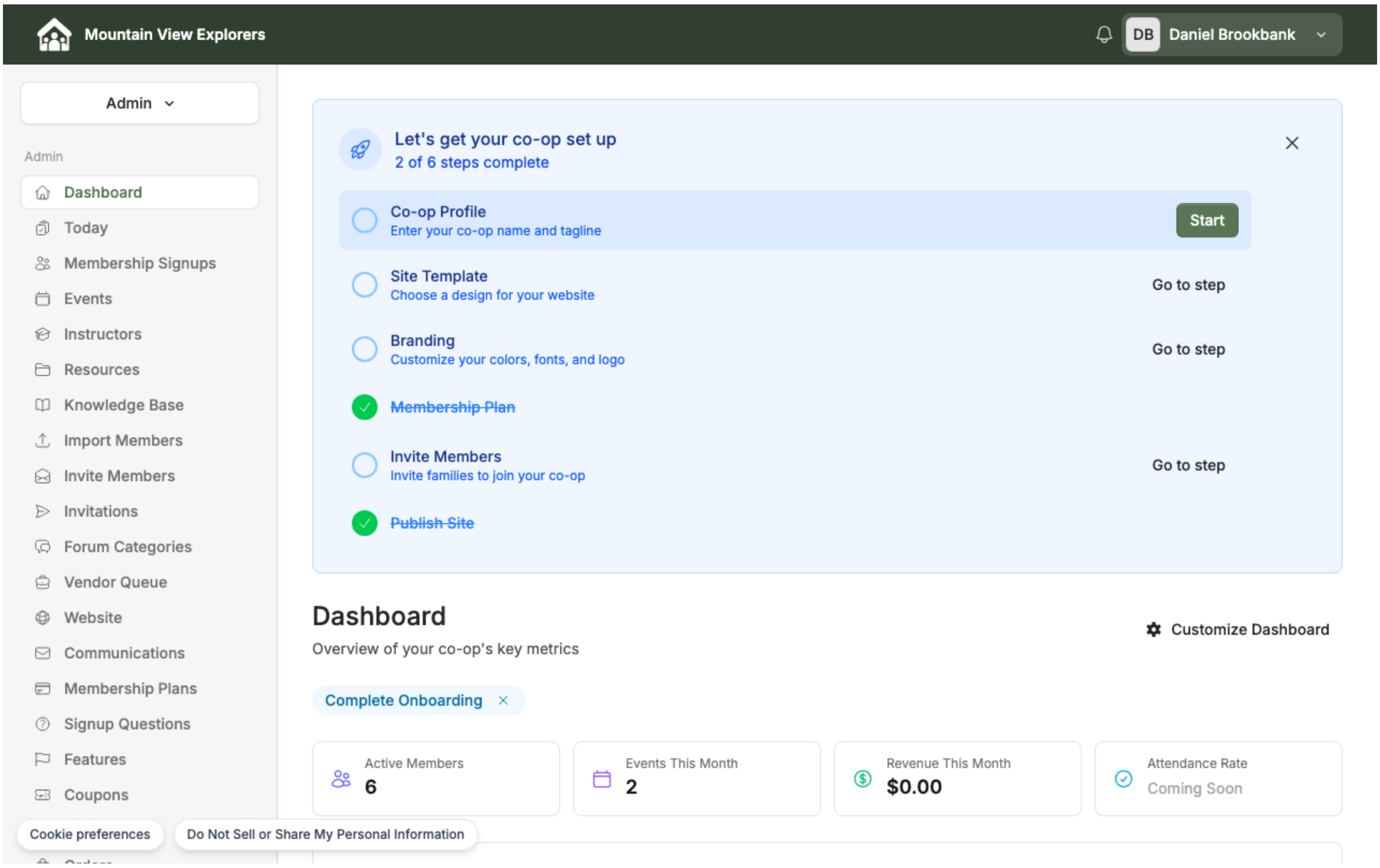
Read Account Basics to navigate your dashboard and update your profile settings.

Account Basics — Dashboard and Settings

Once you're logged in, you'll spend most of your time in the dashboard. Here's what you need to know to get started.

Your Dashboard

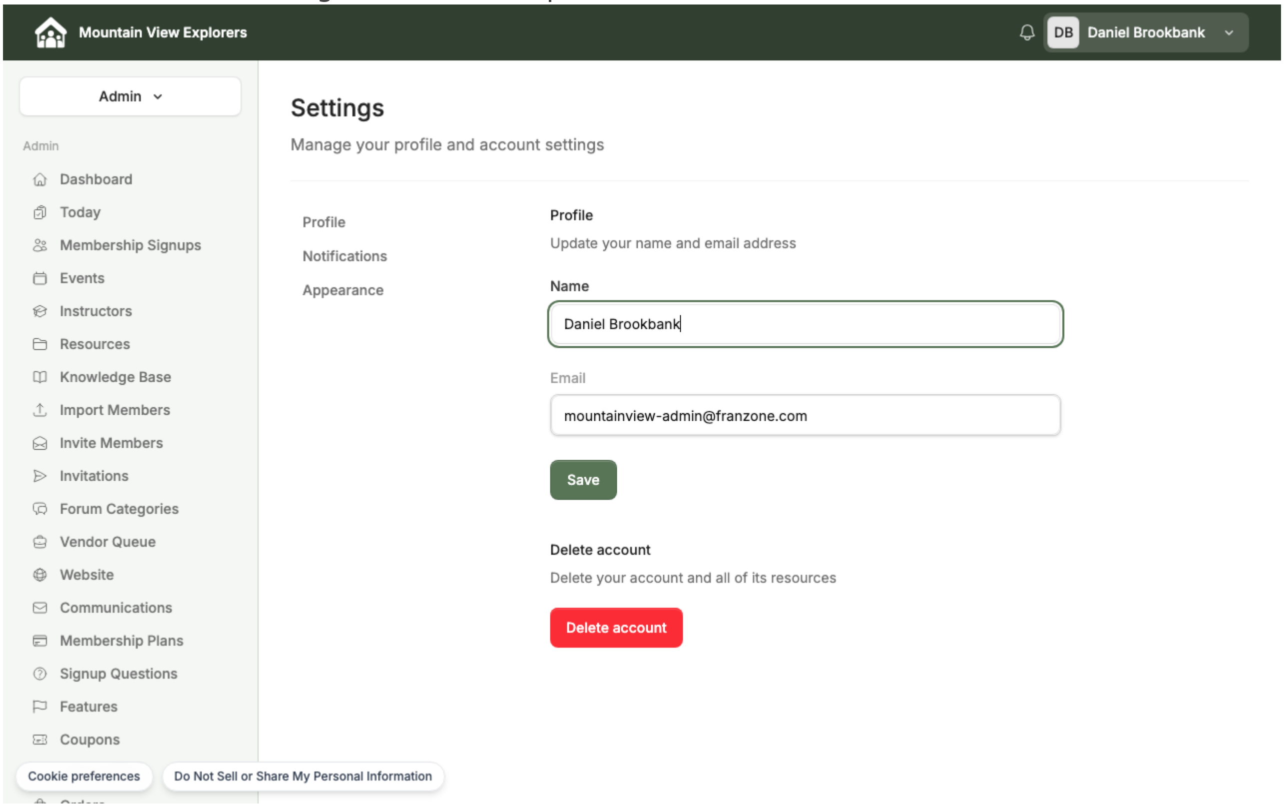
The dashboard is your home base for managing your co-op. From here, you can create events, manage members, and track schedules.



Manage Your Account Settings

To update your profile information or change your password:

1. From the dashboard, click your profile icon or name in the top-right corner.
2. Select "Account Settings" from the dropdown menu.



3. Update your email address, name, or password as needed.
4. Click "Save Changes" to confirm.

What's next

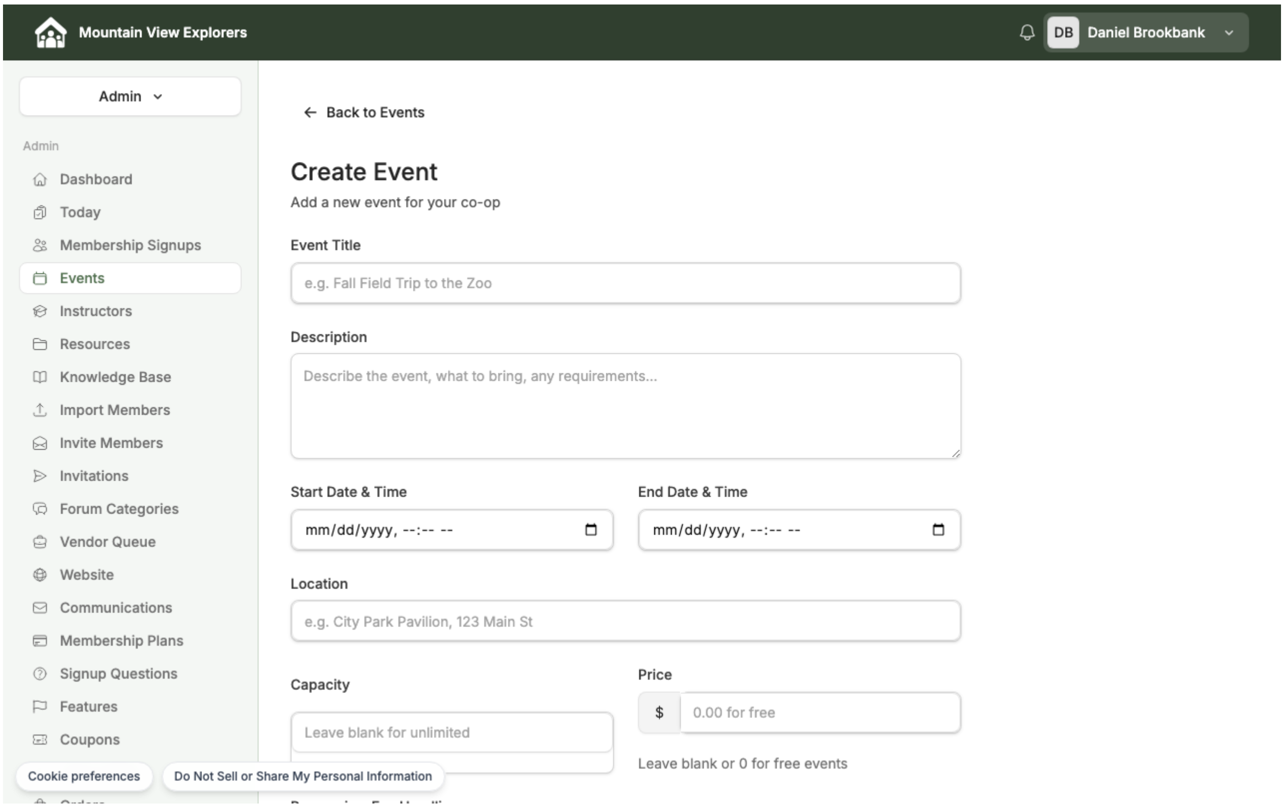
Read [Creating an Event] to set up your first co-op gathering.

Creating an Event

Events are how you schedule co-op meetings, classes, and gatherings. Here's how to create one.

Steps

1. From your dashboard, click the "Create Event" button or navigate to the Events section.
2. Click "New Event" to start.



3. Fill in the event details:
   - **Event Title**: Give your event a clear name (e.g., "Science Class," "Monthly Meetup")
   - **Date and Time**: Select when the event takes place
   - **Location**: Add the address or link where the event will happen
   - **Description**: Add details about what to bring, what to prepare, or any instructions for families
4. Set recurring options if this event happens regularly (weekly, monthly, etc.).
5. Add families or members who should be invited to this event.
6. Click "Create Event" to save.

Your co-op members will now see this event in their calendars and can RSVP.

What's next

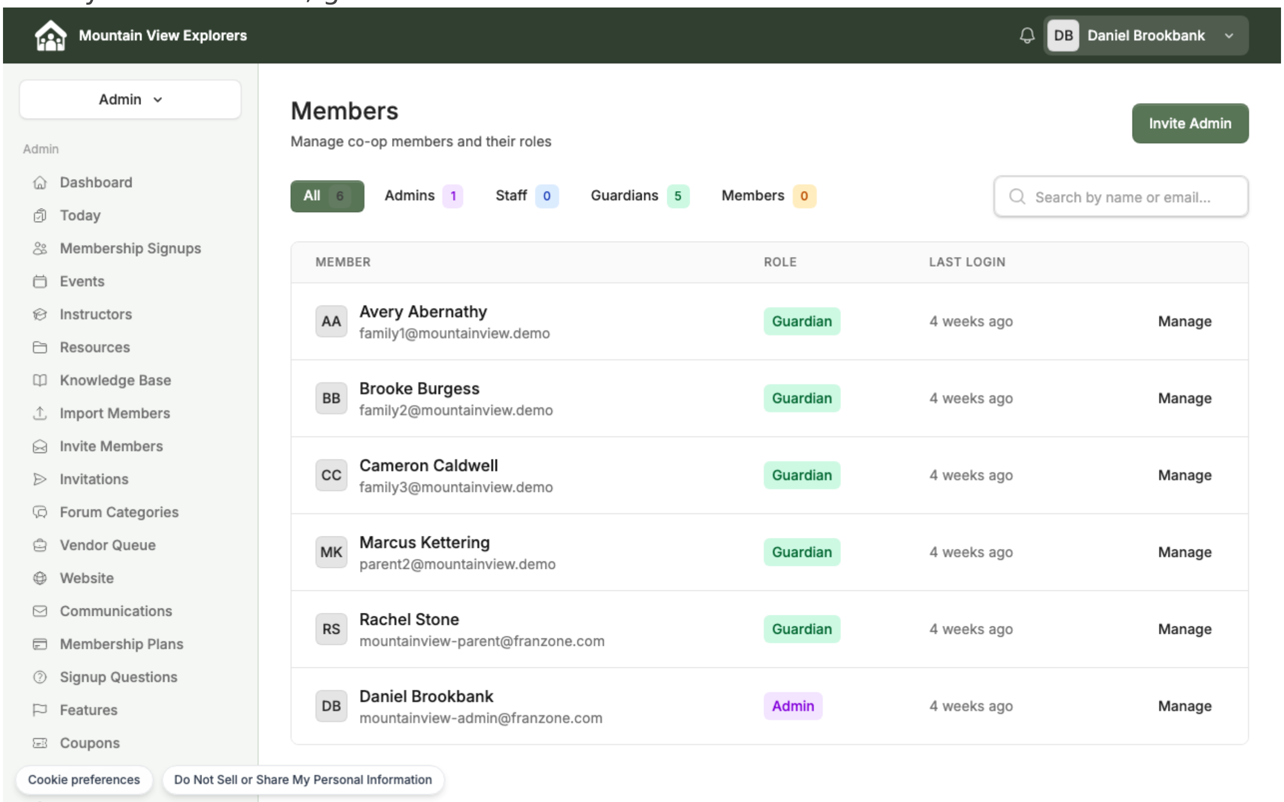
Start inviting your co-op families and creating a shared schedule. For help managing members or invitations, check the Account Basics article.

Inviting Families to Your Co-op

Once your co-op is set up, you'll need to invite families so they can see the calendar and RSVP to events.

Steps

1. From your dashboard, go to the **Members** section.



2. Click "Invite Family" or "Add Member" to start sending invitations.
3. Enter the email addresses of family members you want to invite to your co-op.
4. Optionally add a message explaining the co-op and what to expect.
5. Click "Send Invitations" to send email invites to the families.

What families see

Families will receive an email with a link to join your co-op. When they click the link, they'll create a CooplyHQ account and be added to your co-op automatically. They'll then see all upcoming events and can RSVP.

Managing members

From the Members page, you can:

- View all families in your co-op
- Remove families who are no longer participating
- See who has accepted the invitation and who hasn't yet

What's next

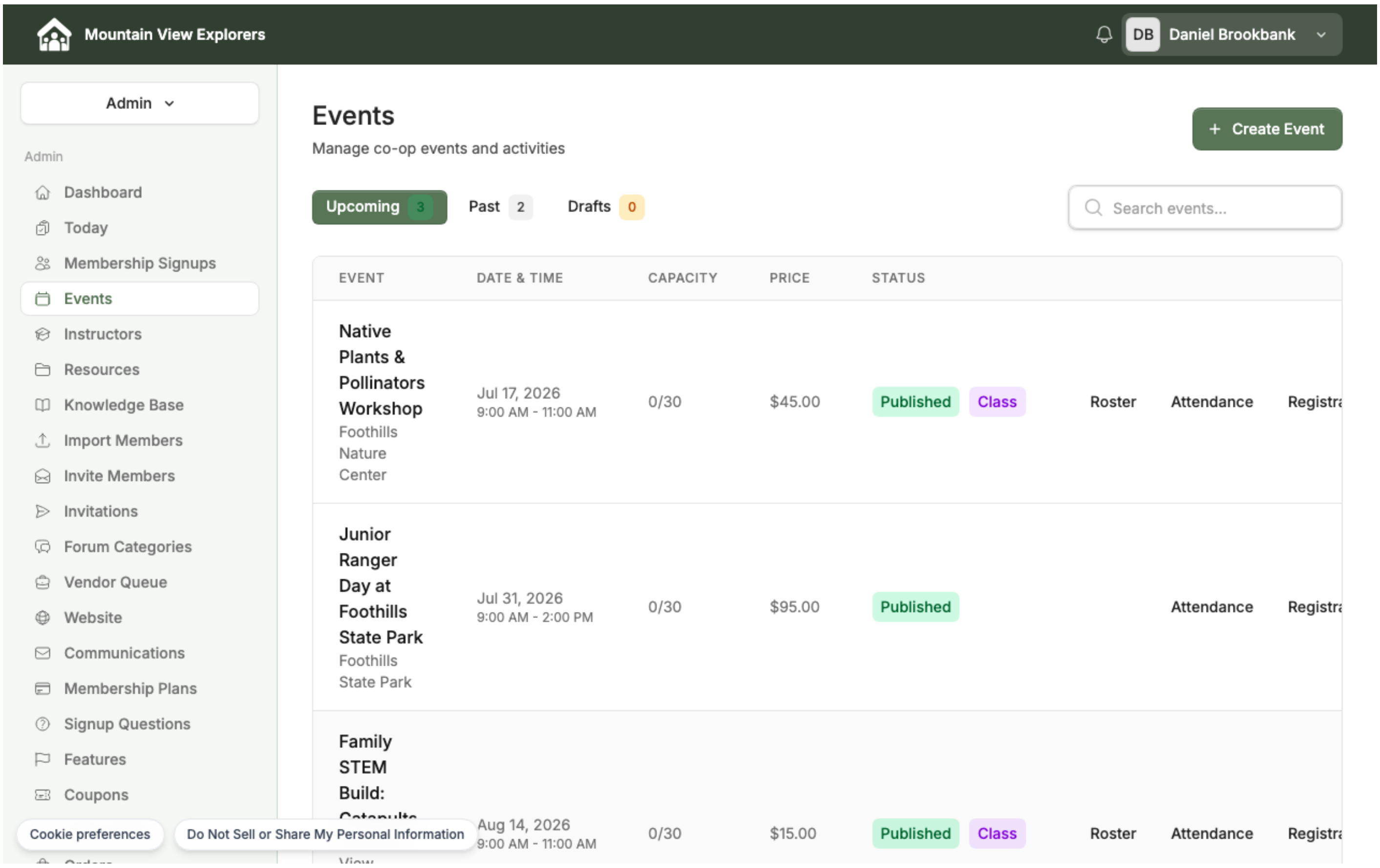
Once families are invited, see Creating an Event to schedule your first gathering.

Managing Your Co-op Calendar

Your calendar is where families see all upcoming events, RSVPs, and schedules for the co-op.

View Your Calendar

From your dashboard, go to the **Events** section to see all your co-op events.



Here you can:

- See upcoming events at a glance
- View event details by clicking on any event
- See who has RSVP'd to each event
- Manage attendance and scheduling

Edit or Cancel Events

1. Click on any event in your calendar.
2. Select "Edit" to change the date, time, location, or description.
3. To cancel an event, select "Delete" and confirm. Families will be notified of the cancellation.

Recurring Events

When you create an event with a recurring schedule (like weekly classes), CooplyHQ automatically creates each instance. You can edit individual events or the entire series.

Share Your Calendar

Families can view the entire co-op calendar once they join. They'll see all upcoming events and can RSVP to the ones that apply to them.

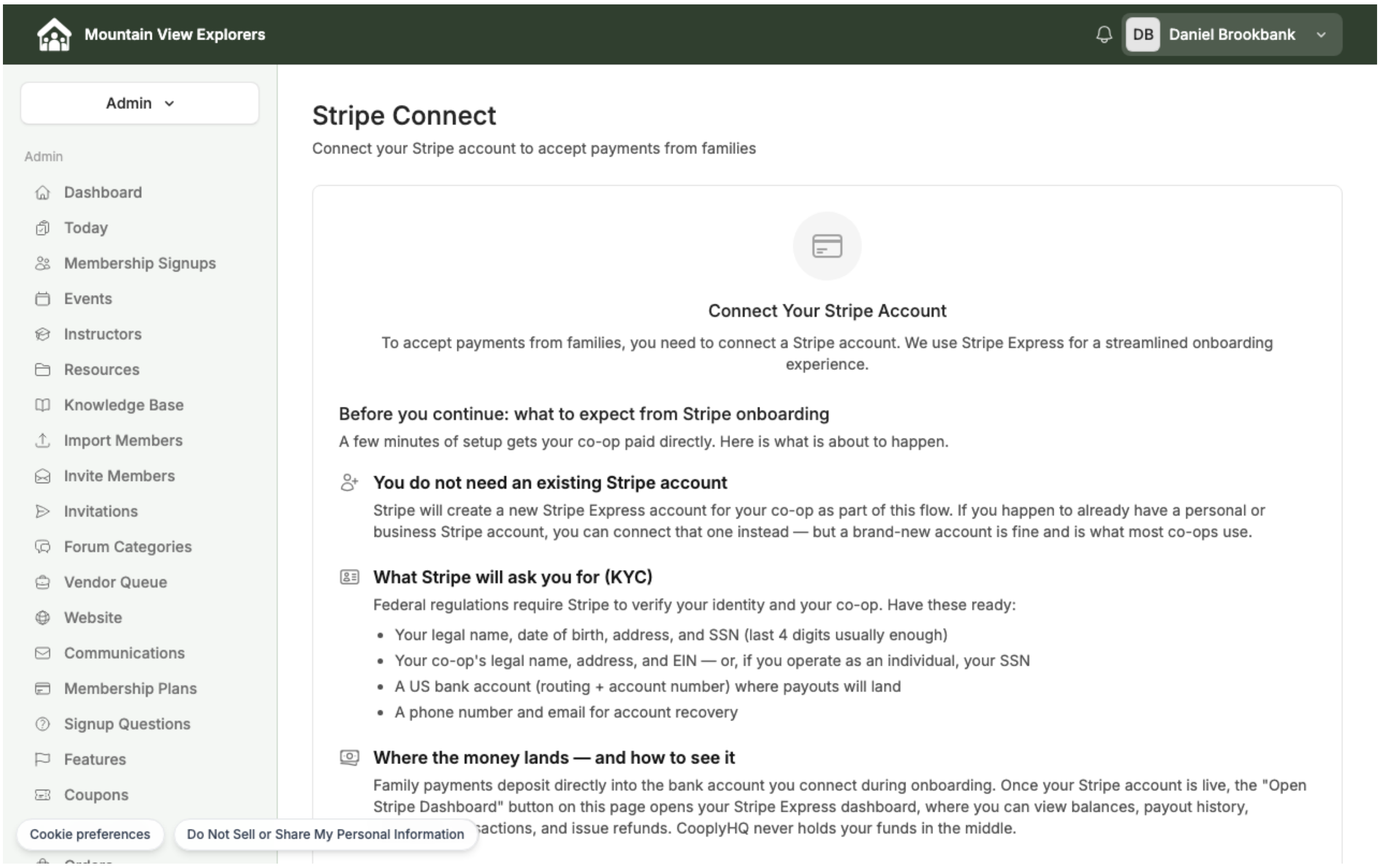
What's next

Once your calendar is set up with events, see [Inviting Families to Your Co-op] to start building your community.

Setting Up Stripe Payments: How Onboarding Works and How Fees Are Handled

CooplyHQ uses **Stripe Express** to process payments from families. Before you click **Start Stripe Onboarding**, here is exactly what to expect — so there are no surprises partway through.

To begin: go to **Admin → Payouts & Billing → Stripe Connect** in your co-op admin panel.



You do not need an existing Stripe account

Stripe will create a new **Stripe Express** account for your co-op as part of this flow. If you already have a personal or business Stripe account, you can connect that one instead — but a brand-new account is fine and is what most co-ops use.

What Stripe will ask you for (KYC)

Federal regulations require Stripe to verify your identity and your co-op. Have these ready before you start:

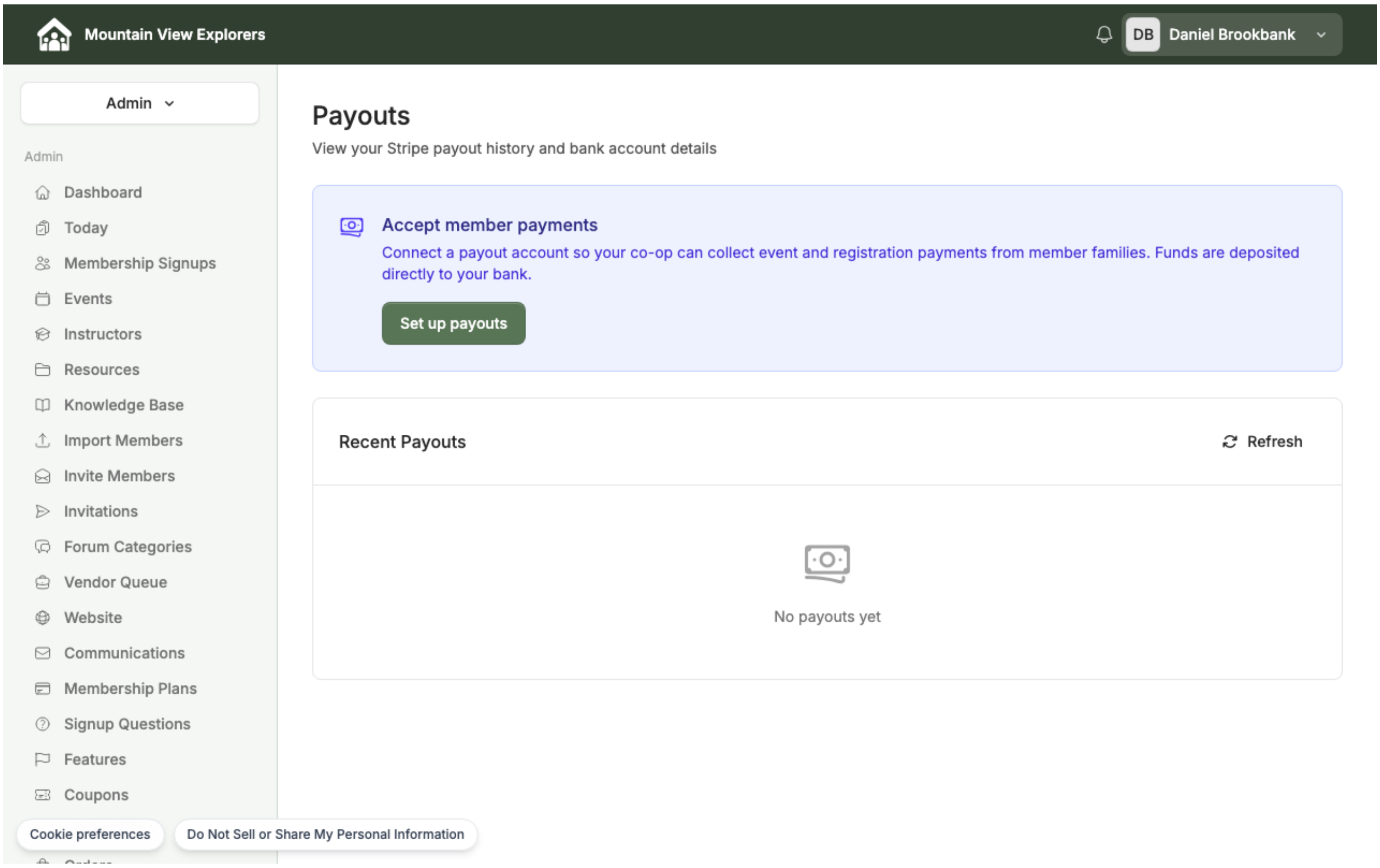
- Your **legal name**, date of birth, address, and **SSN** (last 4 digits usually enough)
- Your **co-op's legal name**, address, and **EIN** — or, if you operate as an individual, your SSN
- A **US bank account** (routing + account number) where payouts will land
- A **phone number and email** for account recovery

Stripe's onboarding form walks you through each step. Most co-op admins complete it in about 10 minutes. Your information goes directly to Stripe — CooplyHQ never sees or stores it.

Where the money lands — and how to see it

Family payments deposit **directly into the bank account** you connect during onboarding. CooplyHQ never holds your funds in the middle.

Once your Stripe account is live, the **Open Stripe Dashboard** button on the Stripe Connect page opens your **Stripe Express dashboard**, where you can view balances, payout history, individual transactions, and issue refunds.



How Stripe fees are handled

Stripe charges a processing fee on each card payment (typically 2.9% + 30¢). CooplyHQ gives you control over how those fees are handled. You set the mode **per priced item** — membership plans, events, classes, and classified listings each have their own setting.

Two modes are available:

Absorb *(default)*

Your co-op pays the Stripe processing fee. Families pay the sticker price exactly. If you list a class at $50, the family pays $50 and your co-op receives the remainder after Stripe's fee.

Choose Absorb when you want the simplest checkout experience for families and are comfortable building the fee into your pricing.

Gross-up

One all-in price for families, with the Stripe fee baked into the displayed amount. The buyer effectively pays the fee.

Example: If you want to net $50, CooplyHQ calculates the grossed-up price (approximately $52.06) so that after the Stripe fee is deducted, you receive exactly $50.

Choose Gross-up when you want your co-op to net a specific amount on every transaction.

Why checkout happens on checkout.stripe.com

When a family clicks to pay, they are redirected to **checkout.stripe.com** — Stripe's PCI-compliant hosted checkout page — to enter card or bank details, then returned to your co-op site.

Card numbers never touch CooplyHQ's servers. This keeps your co-op completely out of PCI compliance scope — a significant benefit that removes a large category of data security requirements from your organization.

Ready to connect?

Go to **Admin → Payouts & Billing → Stripe Connect** and click **Start Stripe Onboarding**. The guided Stripe flow takes a few minutes. Once complete, your co-op can immediately start collecting payments from families.

How to Set Up Membership Plans and Recurring Payments

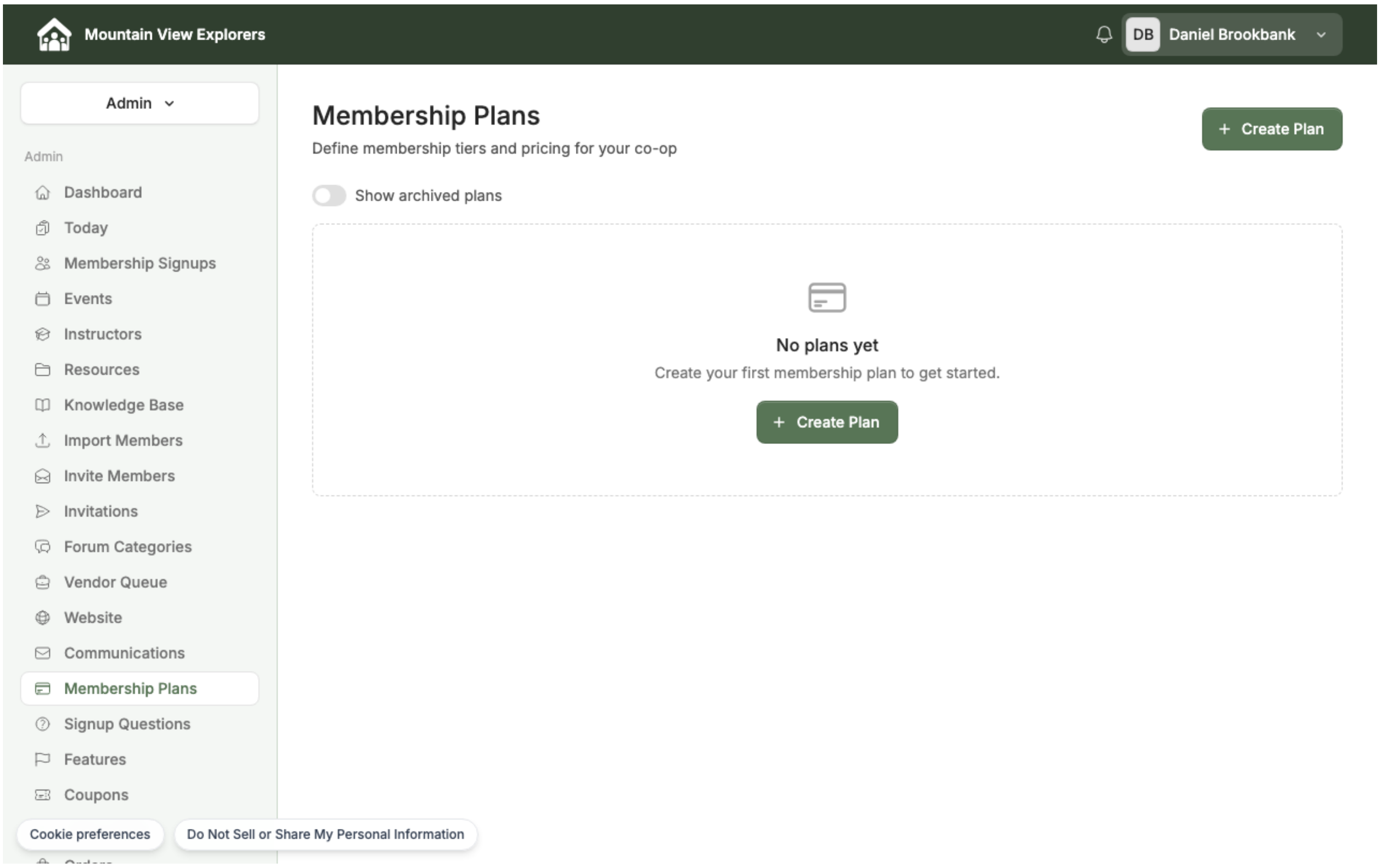
Overview

Membership Plans let you define the tiers families choose from when joining your co-op. Each plan can have a name, a description, feature bullets, and one or more billing intervals (monthly, semester, or annual). Once you save a plan it becomes active immediately and appears on your co-op's public membership page.

Before you start: Your Stripe account must be connected under **Payouts & Billing** before you can create paid plans. Free plans do not require Stripe. See Setting Up Stripe Payments for setup instructions.

Step 1: Open Membership Plans

1. Sign in to your co-op admin panel.
2. In the left sidebar, click **Membership Plans**.

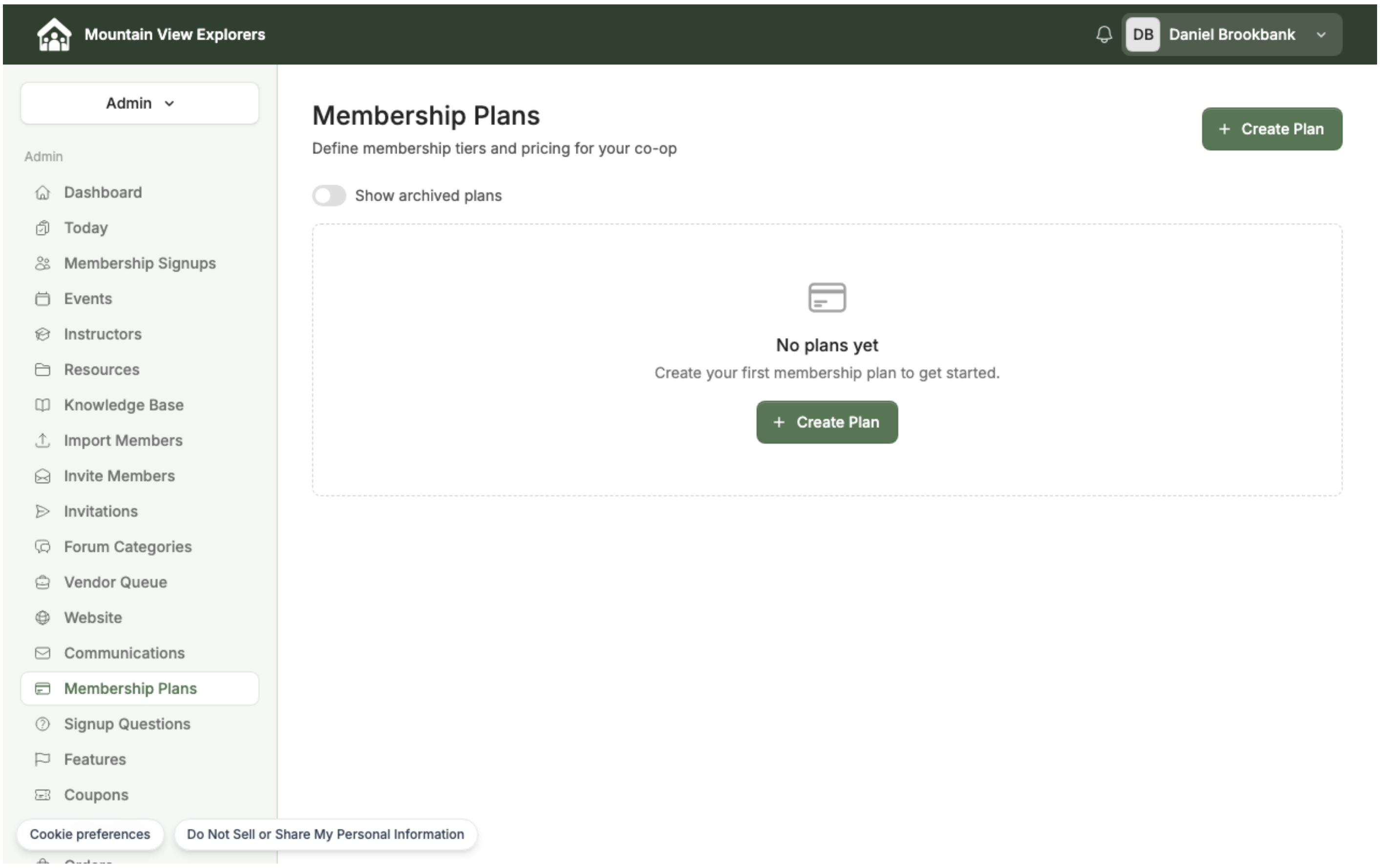


The page shows all your active plans. If you have not created any yet, it shows "No plans yet" with a **Create Plan** button.

Step 2: Create a Plan

1. Click **+ Create Plan** (top-right) or the **Create Plan** button in the empty-state card.

The **Create Plan** modal opens.



2. Fill in the plan details:

Field	What to enter
Plan Name	Short, recognizable name (e.g., "Basic", "Family", "Premium")
Description *(optional)*	One or two sentences describing what the plan includes
Features *(optional)*	Bullet points shown to families on the enrollment page — click **+ Add Feature** to add more

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Step 3: Set Pricing and Billing Intervals

Free plan

Toggle on **Free Tier** if families join at no cost. No Stripe connection is required for free plans. Skip to Step 4.

Paid plan

Leave **Free Tier** off. Under **Billing Periods**, enable one or more intervals:

- **Monthly** — families are billed every month
- **Semester** (6 months) — families are billed twice a year
- **Annual** — families are billed once a year

For each enabled interval, enter the price in dollars.

Processing-Fee Handling — choose how Stripe's processing fee is covered:

Option	What happens
Absorb *(default)*	Your co-op pays the processing fee. Families are charged exactly the listed price.
Gross-up	The processing fee is added into the displayed price. Families see one all-in amount.

You can mix intervals and fee modes — for example, offer both Monthly and Annual with different fee settings on each.

Step 4: Set Optional Limits

Scroll down in the modal to configure optional settings:

Field	What it does
Member Limit *(optional)*	Maximum number of members allowed on this plan. Leave blank for unlimited.
Requires Application	When on, each signup must be manually approved by an admin before the family gains access.

Step 5: Save the Plan

Click **Create Plan**. The plan saves and is immediately **Active** — no separate publish step is needed.

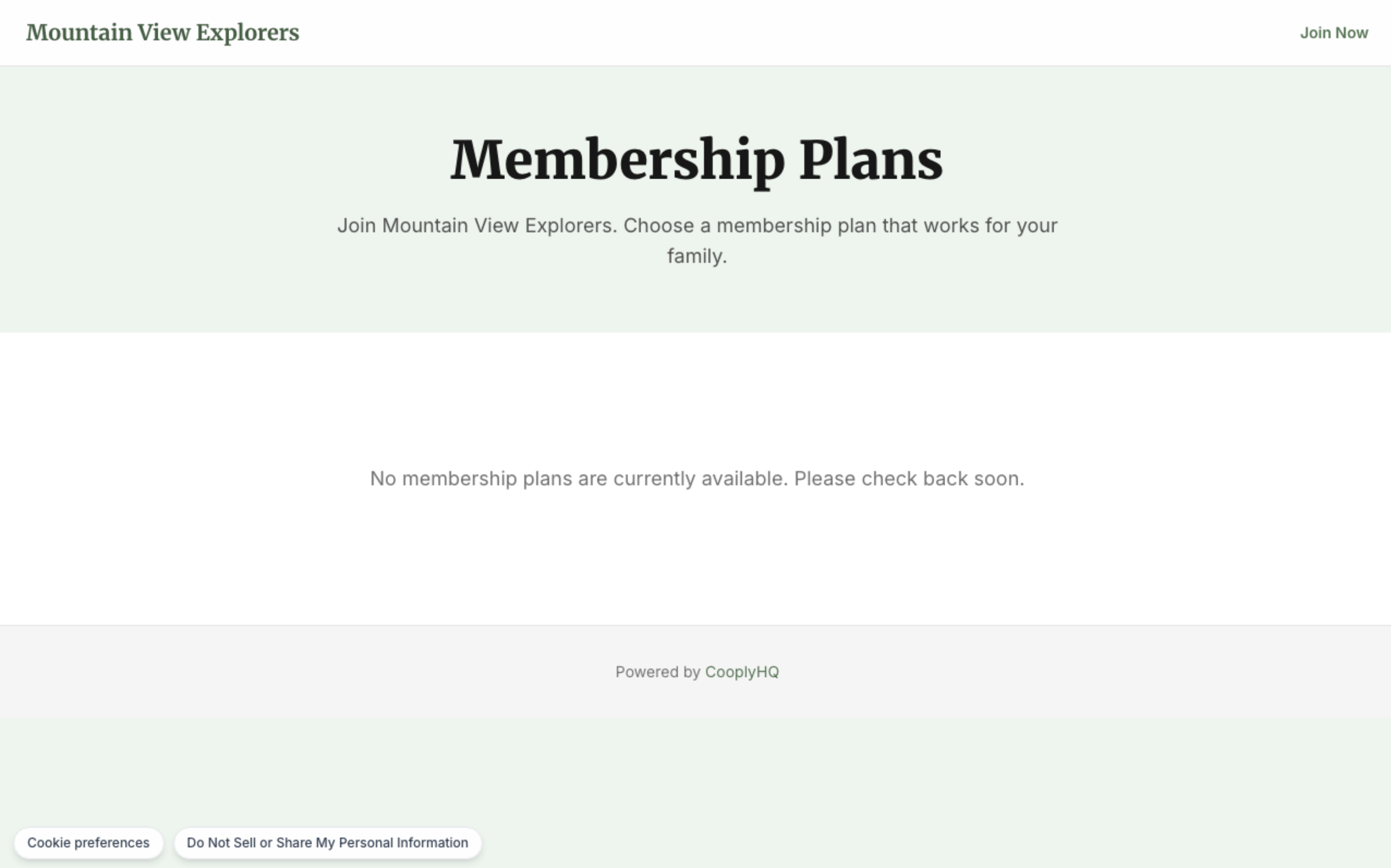
To edit a plan later, return to **Membership Plans** and click **Edit** on any plan card.

Step 6: How Families See and Enroll

Once at least one plan is active, families can visit your co-op's public membership page at:

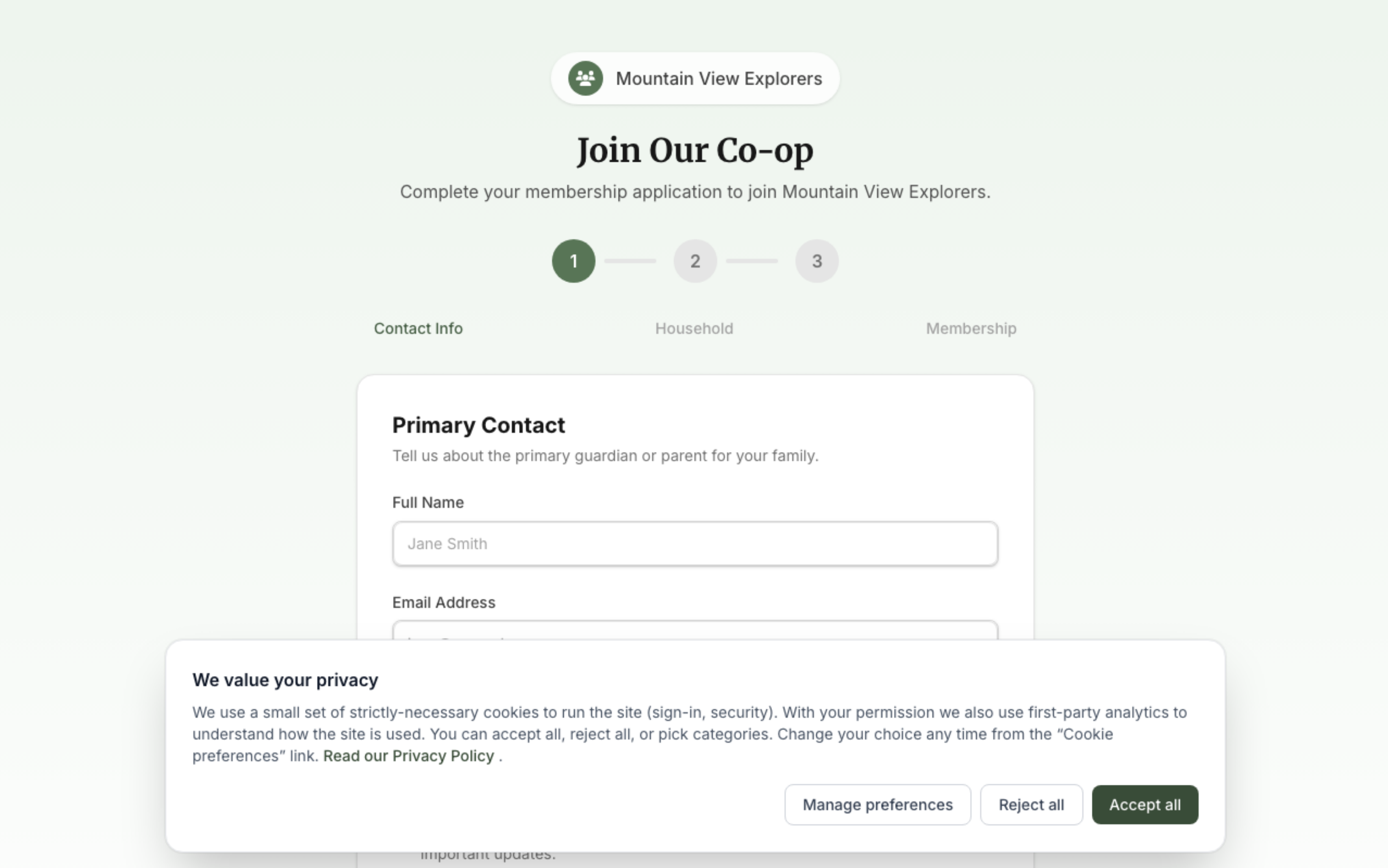
```
https://yourco-op.cooplyhq.com/membership/plans
```

The page lists all active plans. If you offer multiple billing intervals (e.g., Monthly and Annual), a toggle at the top lets families switch between intervals to compare prices.



Families click **Join Now** to begin a three-step application:

1. **Contact Info** — primary contact name, email, and phone number
2. **Household** — children and household details
3. **Membership** — plan and billing interval selection, then payment

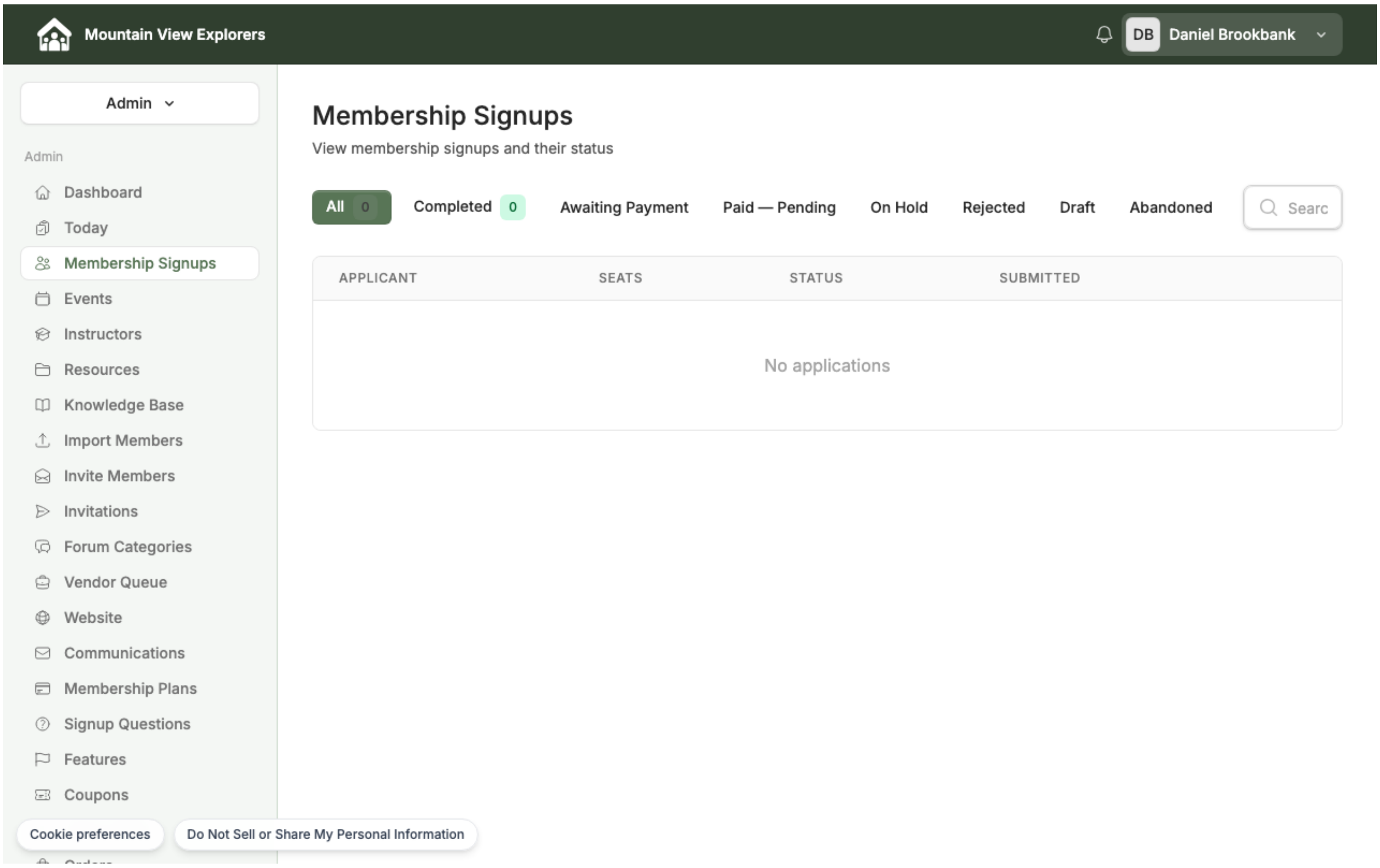


After completing the form, families are taken to Stripe Checkout to pay (for paid plans) or directly to a confirmation page (for free plans).

Step 7: View Active Memberships

To see who has applied or enrolled:

1. In the left sidebar, click **Membership Signups**.



The **Membership Signups** page shows all applications with status tabs:

Tab	Meaning
Completed	Enrollment is finished and payment (if required) has been received
Awaiting Payment	Family submitted the form but has not yet paid
Paid — Pending	Payment received; awaiting admin approval (when "Requires Application" is on)
On Hold	Admin has placed the application on hold for review
Rejected	Application was not approved
Draft	Family started but did not submit the application
Abandoned	Family started and did not complete within the session

Click any row to view the full application details and take action.

What's Next

- **Signup Questions** — Add custom questions to the enrollment form: in the sidebar go to **Signup Questions**.

- **Coupons** — Create discount codes for your plans: in the sidebar go to **Coupons**.
- **Payouts & Billing** — View Stripe payouts and check your balance: in the sidebar go to **Payouts & Billing**.

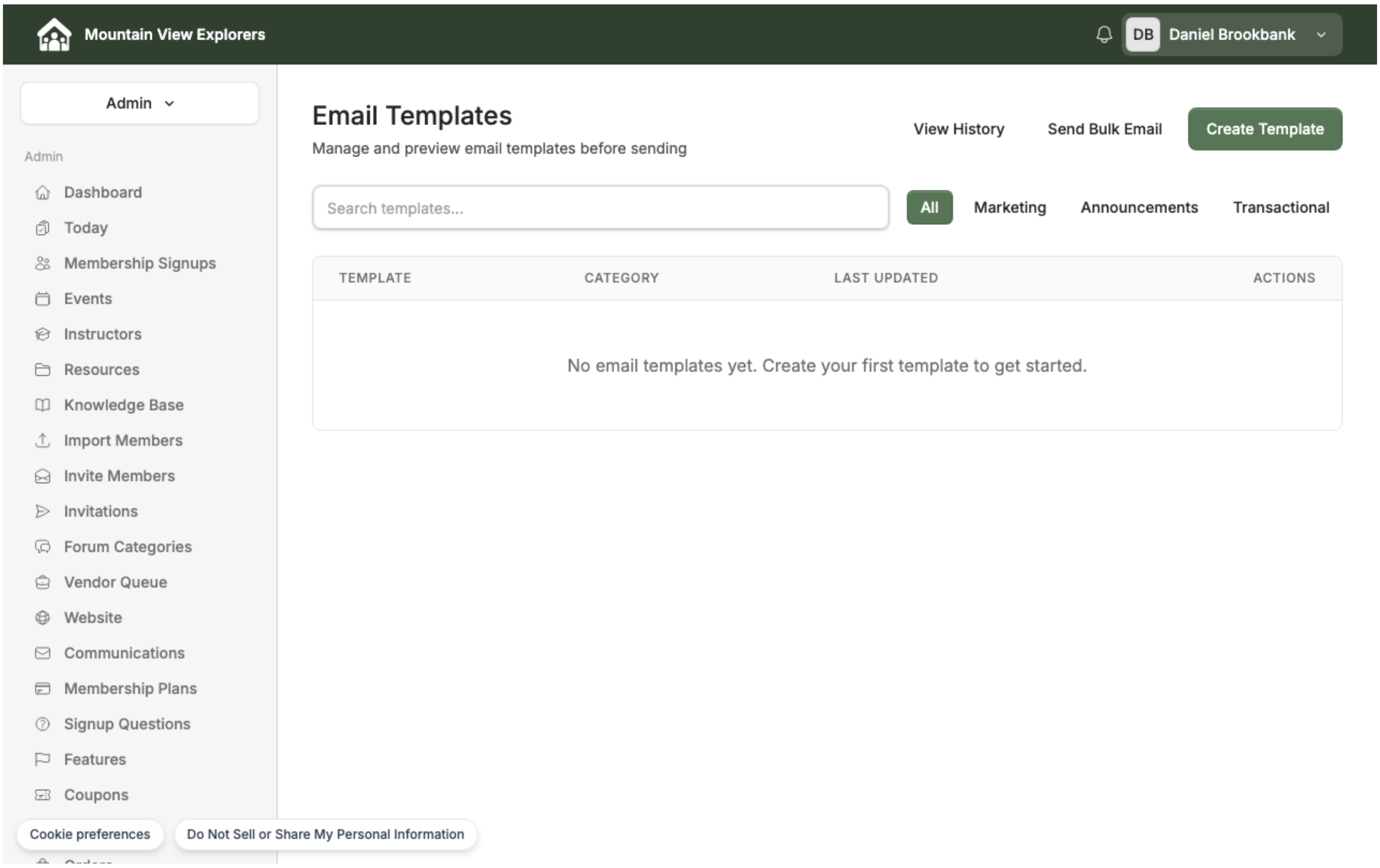
How to Send Newsletters and Announcements to Your Co-op

Overview

CooplyHQ's **Bulk Email** tool lets you send newsletters and announcements to every family in your co-op (or a specific group) in just a few steps. You can write a custom message or use a saved template, preview the email before it goes out, and send immediately or schedule for a future date and time.

Step 1: Open the Bulk Email Tool

1. Sign in to your co-op admin panel.
2. In the left sidebar, click **Communications**.
3. On the Email Templates page, click **Send Bulk Email** in the upper-right corner.

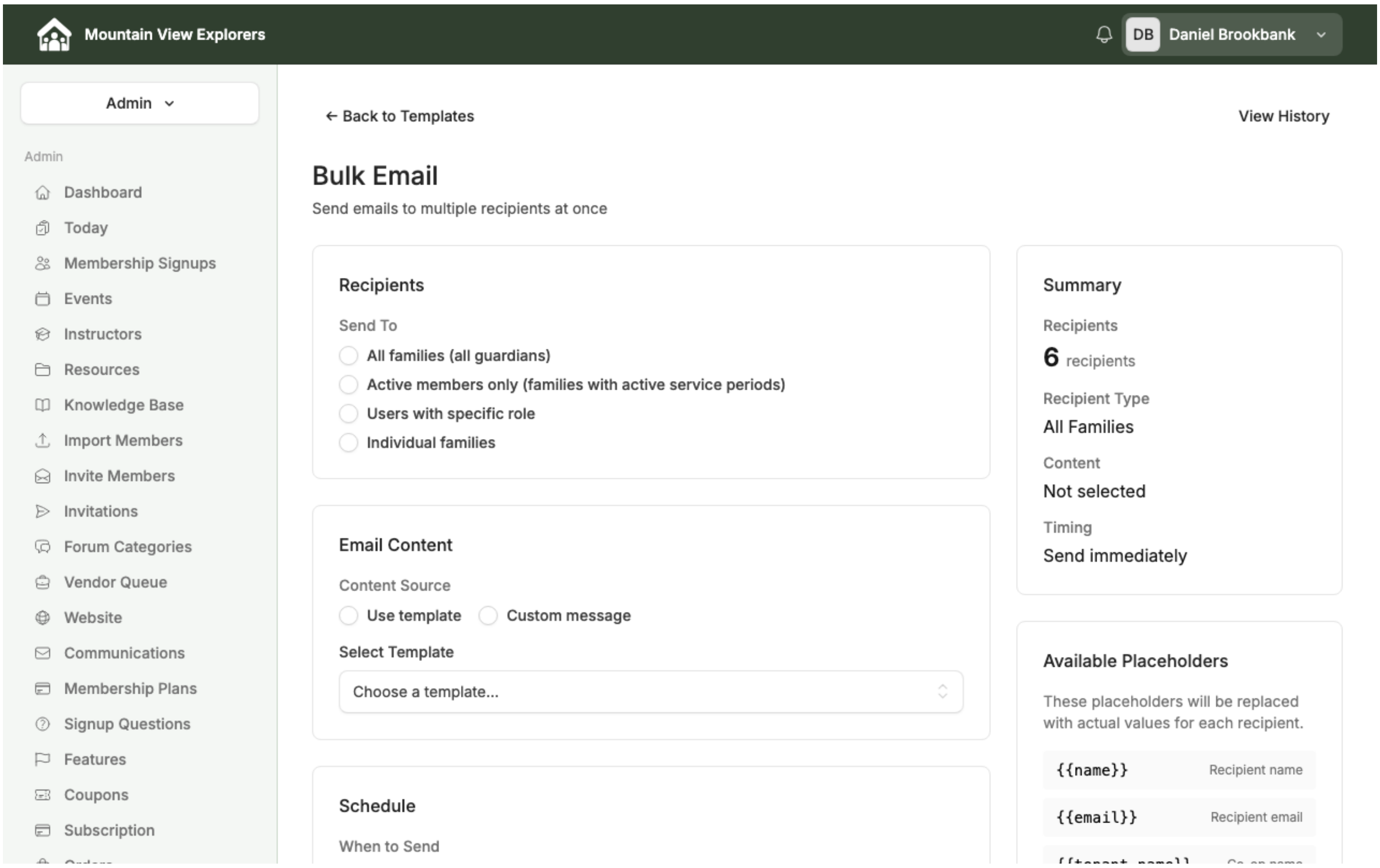


Step 2: Choose Your Recipients

Under **Recipients**, select who should receive the email:

Option	Who receives it
All families (all guardians)	Every guardian in your co-op
Active members only	Families with an active membership period
Users with specific role	Admins, staff, guardians, or members only
Individual families	Specific households you pick from a list

The **Summary** panel on the right updates instantly to show how many recipients match your selection.



Step 3: Write Your Message

Under **Email Content**, choose how to compose your email:

Option A — Use a saved template

1. Select **Use template**.
2. Choose a template from the drop-down. A subject and body preview appear automatically.

Option B — Write a custom message

1. Select **Custom message**.
2. Enter a **Subject**.
3. Write the email body using Markdown.

You can personalize any message with these placeholders — CooplyHQ replaces them with real values for each recipient:

- `{{name}}` — recipient's name
- `{{email}}` — recipient's email address
- `{{tenant_name}}` — your co-op's name

Step 4: Preview and Test

Before sending, verify the email looks right:

- Click **Preview Email** to see a rendered preview of the message.
- Click **Send Test to Me** to receive the email at your own address and check formatting in a real inbox.

Both buttons are in the sidebar on the right side of the page.

Step 5: Choose When to Send

Under **Schedule**, pick a delivery time:

- **Send immediately** — the email goes out as soon as you confirm.
- **Schedule for later** — choose a future date and time. CooplyHQ queues the email and sends it automatically at the scheduled time.

Step 6: Confirm and Send

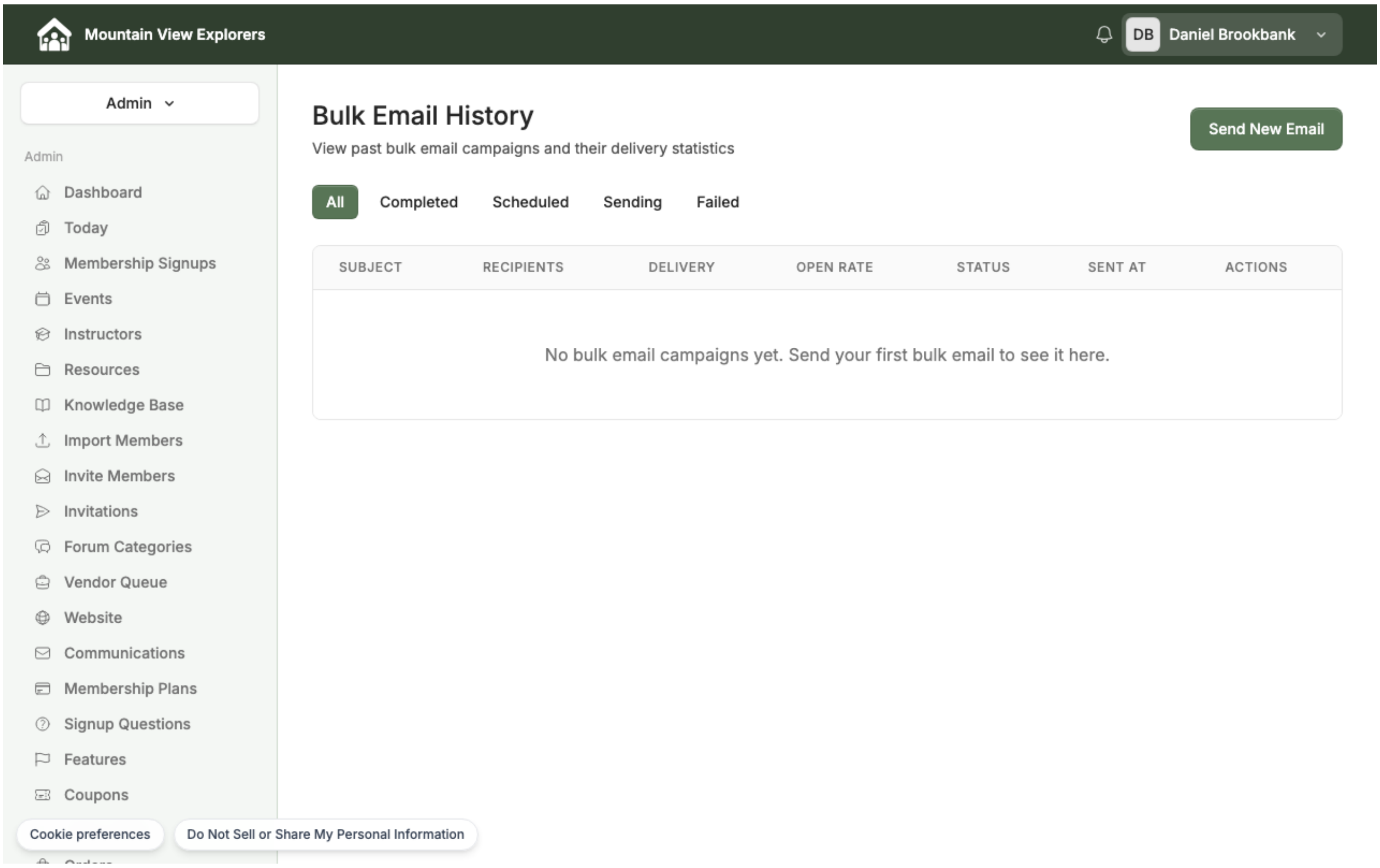
1. Review the **Summary** panel — confirm the recipient count, content, and timing.
2. Click **Send to [N] recipients** (or **Schedule Email** if you picked a future time).
3. A confirmation dialog appears. Review the details and click **Send Email** (or **Schedule Email**) to confirm.

Once sent (or scheduled), a green success message confirms the action. You can click **View History** to see delivery status.

Step 7: View Send History and Status

To review past campaigns:

1. Click **View History** from the Bulk Email page, or navigate to **Communications → View History**.
2. Use the status tabs to filter campaigns: **Completed**, **Scheduled**, **Sending**, or **Failed**.
3. Each row shows the subject, number of recipients, delivery rate, open rate, status, and sent time.
4. To cancel a scheduled email before it sends, find it on the **Scheduled** tab and cancel it from the Actions column.



Next Steps

You're ready to keep your families informed. Send your first newsletter today — share an upcoming event, a co-op update, or a welcome message for new members.

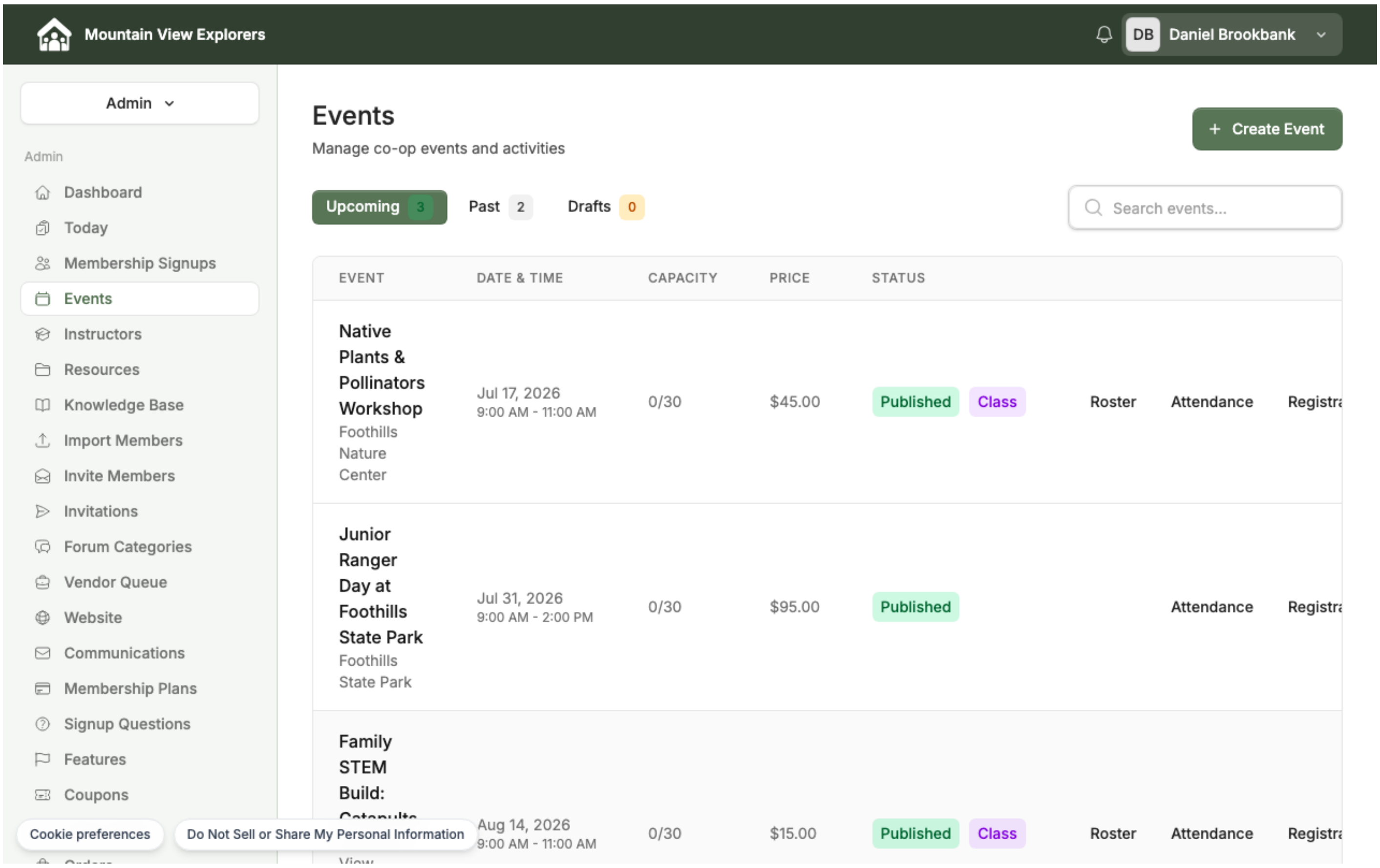
Want to save time on future emails? Set up a reusable template under **Communications → Create Template** so you can send consistent, on-brand messages with one click.

How to Manage Registrations and Track Attendance

Once you have created an event with registration enabled, CooplyHQ gives you a dedicated view to manage who is coming and to track attendance on the day.

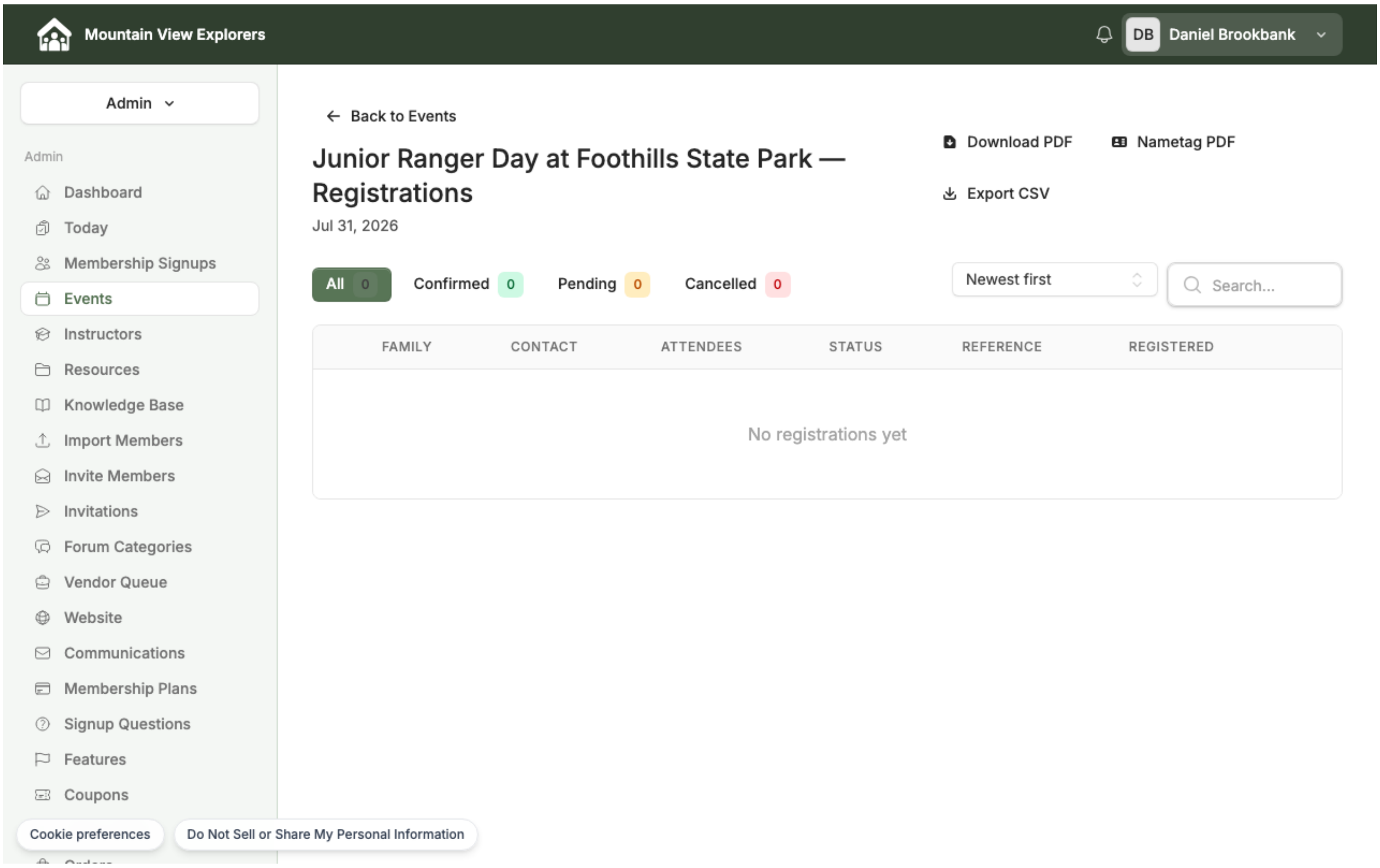
Step 1: Open the Event Registration List

1. Sign in to your co-op admin panel.
2. In the left sidebar, click **Events**.



3. Find the event you want to manage and click its title to open it.
4. Select the **Registrations** tab.

You will see a list of everyone who has registered, including their name, contact email, and registration date. Paid-event entries show the payment status.



Step 2: Manage Individual Registrations

From the Registrations tab you can:

- **Add a registrant manually** — click **Add Registrant** and enter the member's name. Use this when a family contacts you directly rather than registering online.
- **Remove a registrant** — click the three-dot menu next to a name and select **Remove**. This opens a spot back up if capacity is limited.

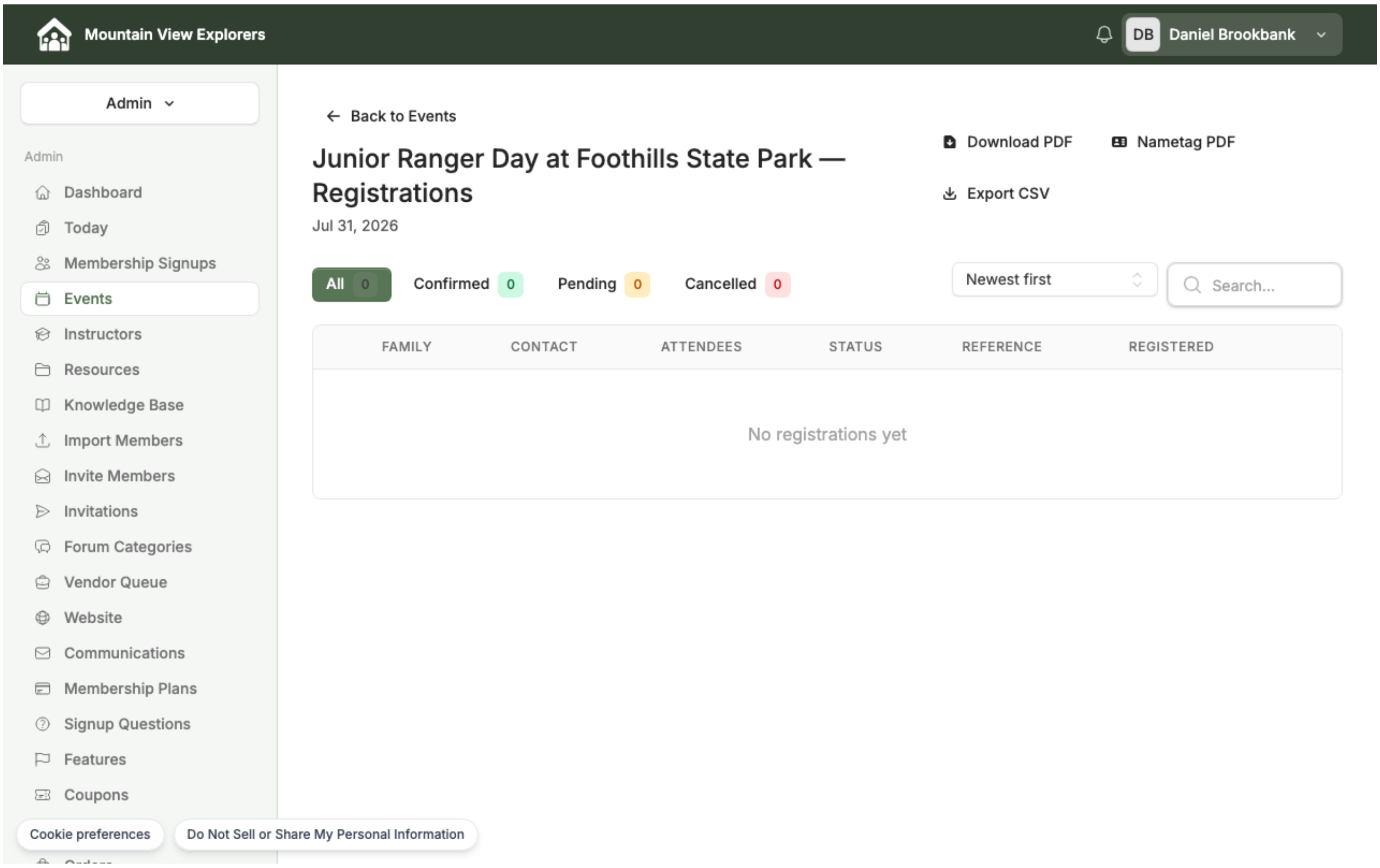
> **Note:** Removing a registration does not automatically issue a refund for paid events. Issue any refund separately through **Orders** in the admin panel.

Step 3: Check In Attendees on the Day

On the day of the event, use the check-in view to mark who actually shows up.

1. Open the event's **Registrations** tab (same steps as Step 1).
2. As each family arrives, find their name in the list and click **Check In**.

The row updates to show a check-in timestamp. You can uncheck an attendee if you made a mistake — click **Undo Check-In** next to the name.



> **Tip:** The check-in view works on a phone or tablet. Pull up the Registrations tab on your mobile browser at the door so you can check in families as they arrive.

Step 4: Record Attendance After the Event

If you were not able to mark attendance live, you can update attendance records after the event:

1. Return to the event's **Registrations** tab.
2. Click **Check In** next to each attendee who was present. Leave absent attendees unchecked.

All records are saved automatically. There is no separate "submit" step.

Step 5: Export the Attendance Report

To download a list of attendees — for your records, a partner organization, or a printable name-tag sheet:

1. On the **Registrations** tab, click **Export**.
2. Choose your format:
   - **CSV** — opens in Excel or Google Sheets; includes name, email, registration date, and check-in status.
   - **PDF (Name Tags)** — printable name-tag sheet sized for standard Avery labels.
3. The file downloads immediately.

Next Steps

- To send a message to everyone registered for this event, see How to Send Newsletters and Announcements.
- To set up your next event, see How to Create an Event and Enable Member Registration.

How to Create an Event and Enable Member Registration

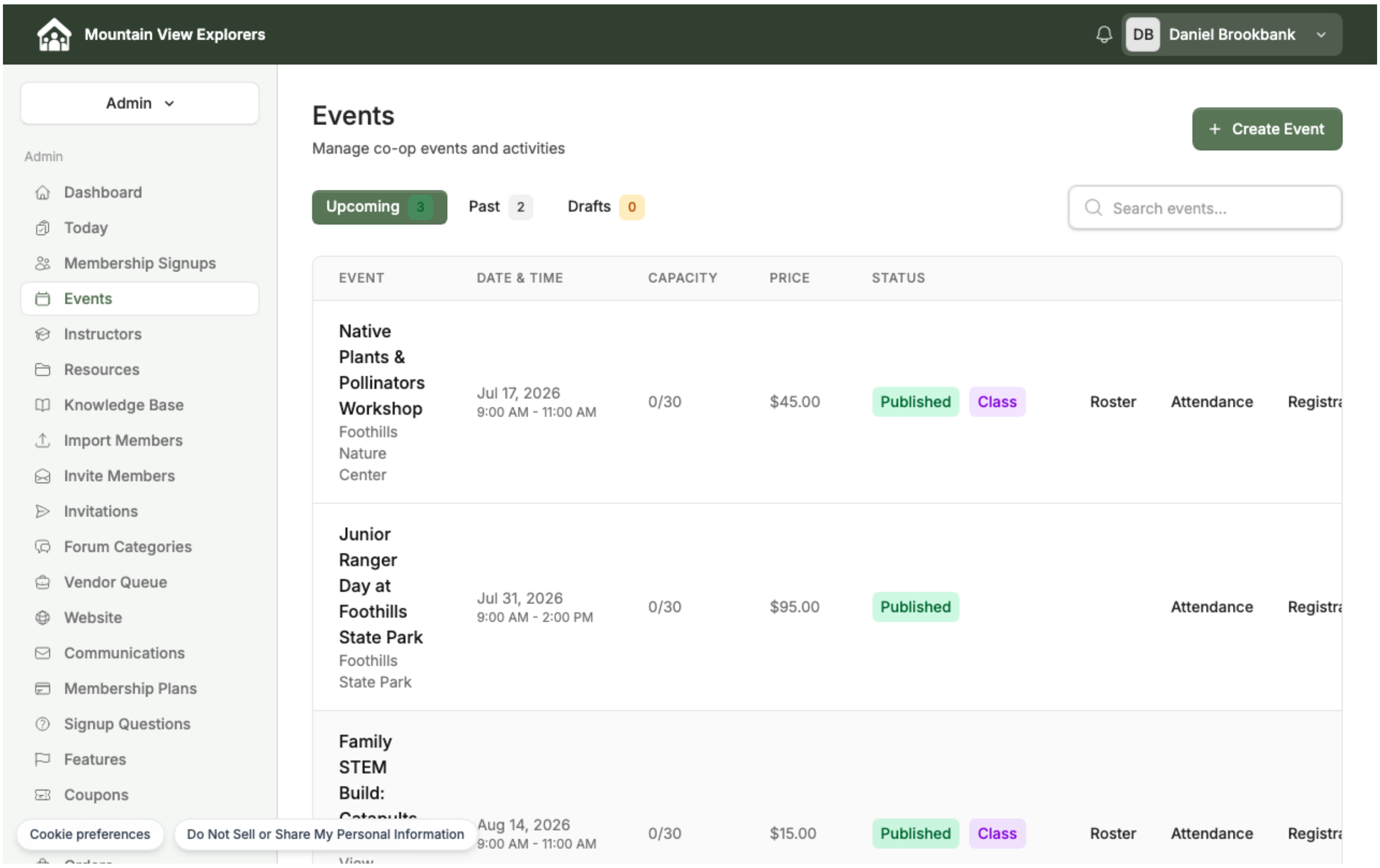
Overview

This guide walks you through creating an event on CooplyHQ and opening it for member registration. After completing these steps, the event will appear on your co-op's events page and members can register directly from their dashboard.

Part 1: Create the Event

Step 1: Go to Events in your admin panel

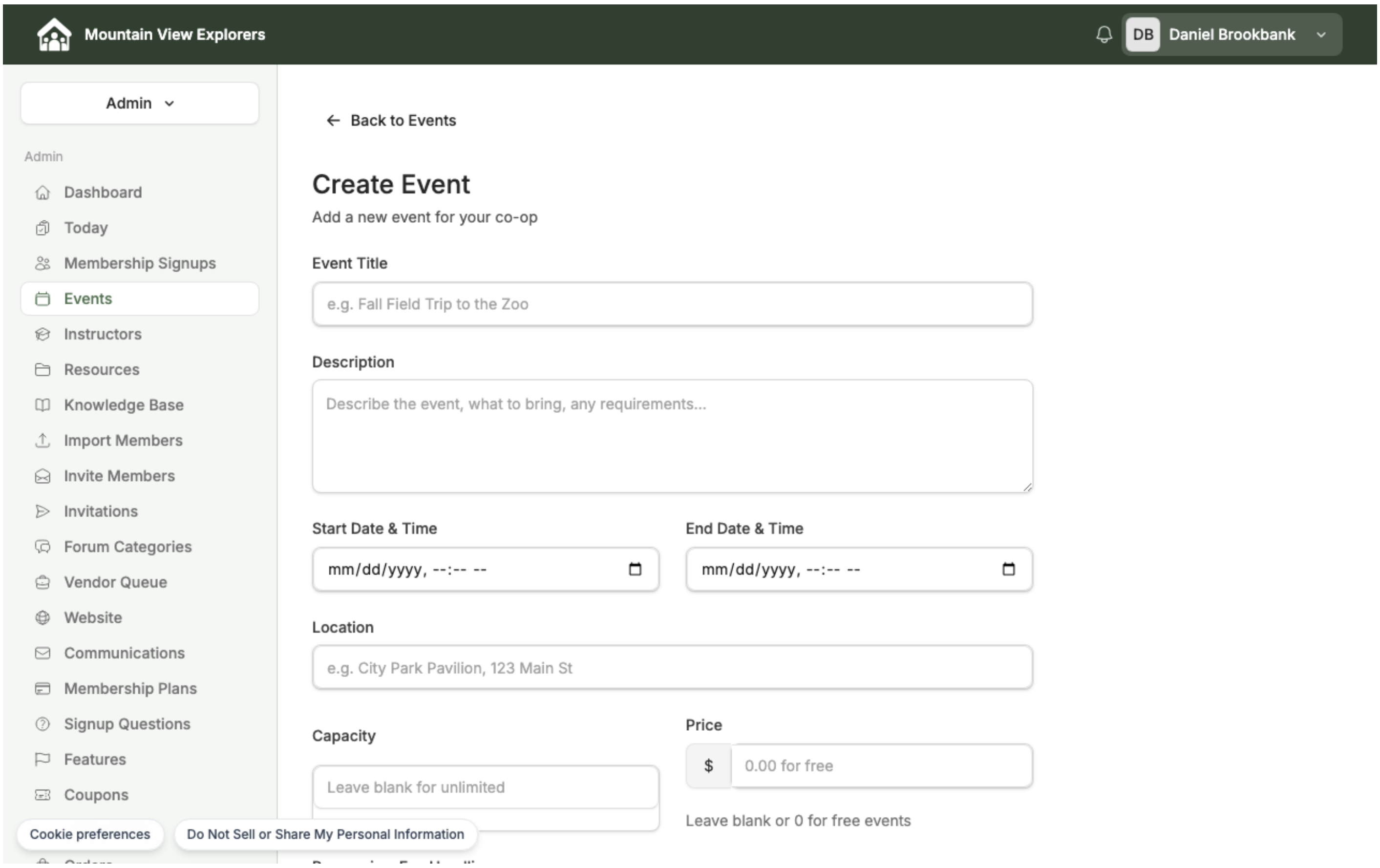
1. Sign in to your co-op's CooplyHQ site.
2. In the left sidebar, click **Events**.



You'll see a list of all events you've created. New co-ops will see an empty state with a prompt to create your first event.

Step 2: Open the Create Event form

1. Click **Create Event** (top right of the Events page).



Step 3: Fill in the event title and description

1. In the **Event Title** field, type a clear, descriptive name (e.g. *Fall Field Trip to the Natural History Museum*).
2. In the **Description** field, add any details families should know — what to bring, where to meet, age suitability, etc.

Step 4: Set the date, time, and location

1. Click the **Start Date & Time** field and pick the event date and start time.
2. Optionally click **End Date & Time** and set when the event finishes.
3. In the **Location** field, enter the address or venue name (e.g. *City Park Pavilion, 123 Main St*).

Part 2: Configure Capacity and Registration

Step 5: Set a capacity limit (optional)

1. In the **Capacity** field, enter the maximum number of registrations you'll accept.
2. Leave the field blank to allow unlimited registrations.

Registration closes automatically one day before the event start time. Capacity limits are enforced in real time — once the last spot is taken, the Register button disappears for new visitors.

Part 3: Set Event Pricing

Step 6: Set the price

1. In the **Price** field, enter the dollar amount per registration (e.g. *12.00*).
2. Leave the field blank, or enter *0.00*, if the event is free.

Fee handling — if you set a price, choose how processing fees are handled:

Option	What members see
Absorb *(default)*	Members pay exactly the listed price. Your co-op covers the processing fee.
Gross-up	The processing fee is built into one combined price. Members see a single total with no separate fee line.

Members receive a payment confirmation email automatically after a successful paid registration.

Part 4: Publish the Event

Step 7: Publish immediately or save as a draft

- Toggle **Publish immediately** on to make the event visible to members as soon as you save.
- Leave it off to save the event as a draft. You can publish it later from the event edit page.

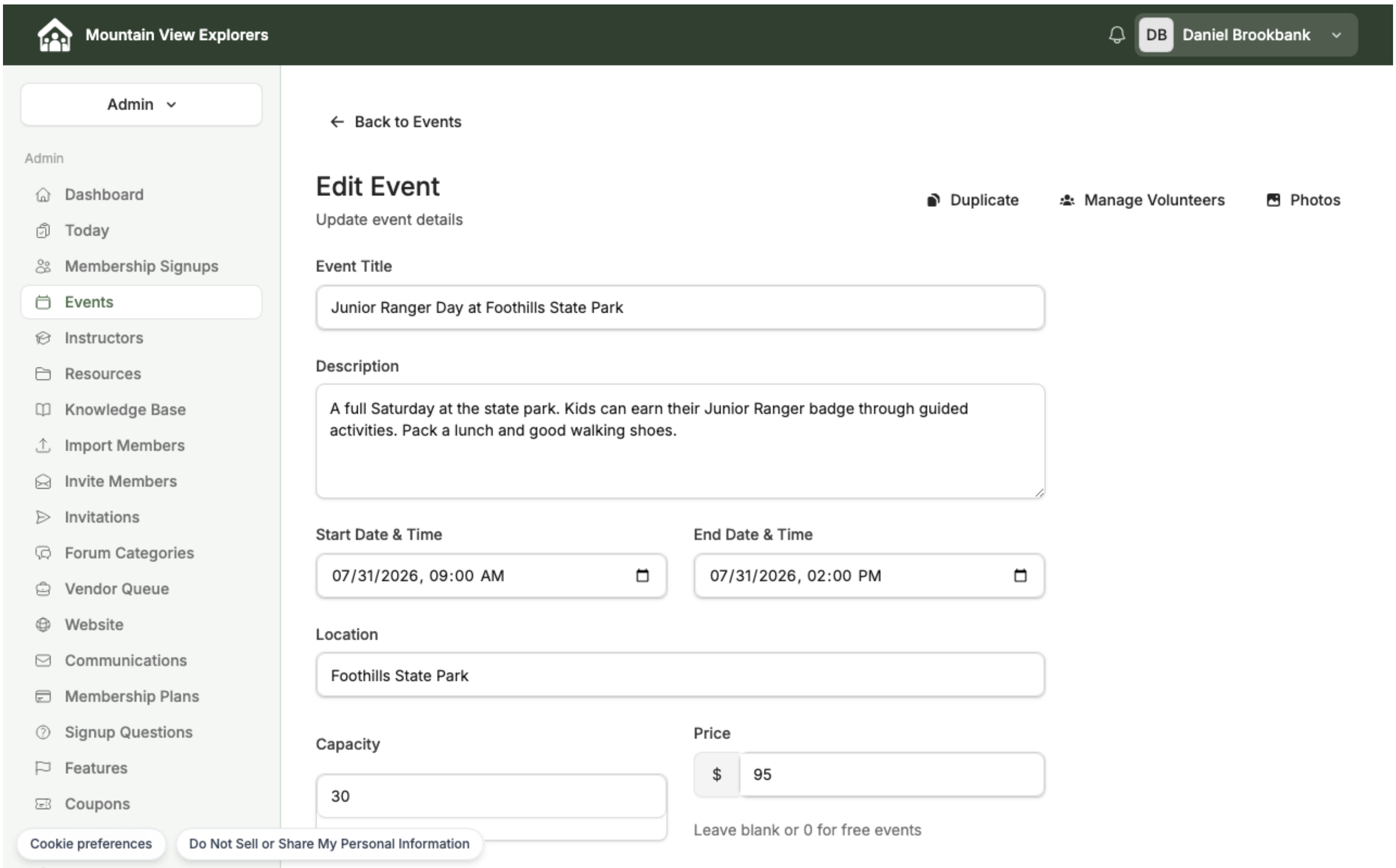
Optional settings:

- **Allow guest registration** — enables non-members to register without a CooplyHQ account.
- **Collect dietary/allergy information** — adds a dietary preferences question to the registration flow.

Step 8: Save the event

1. Click **Create Event**.

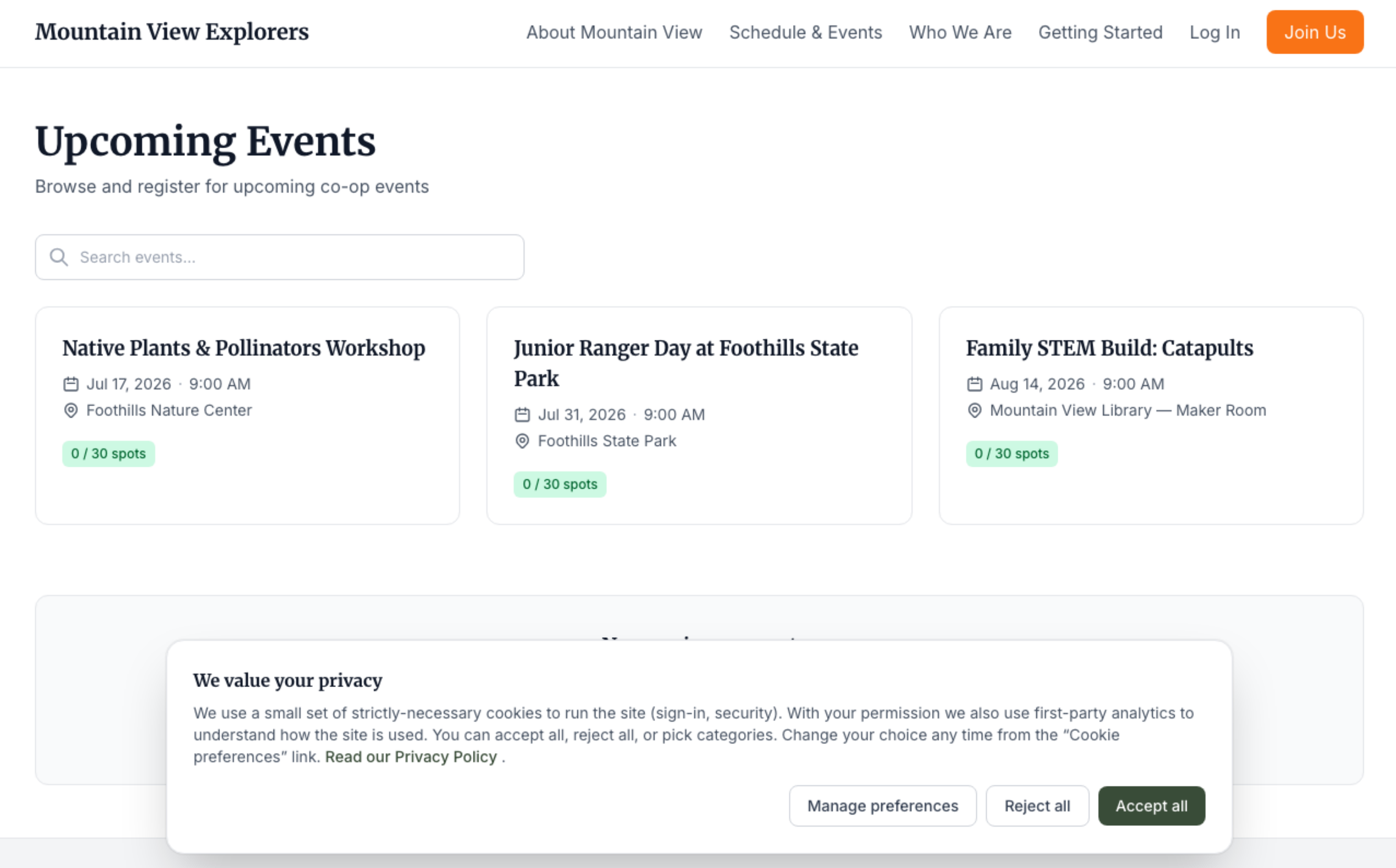
You'll be returned to the Events list, and a confirmation banner will appear. The event is now live if you toggled **Publish immediately** on.



Part 5: Member Registration Experience

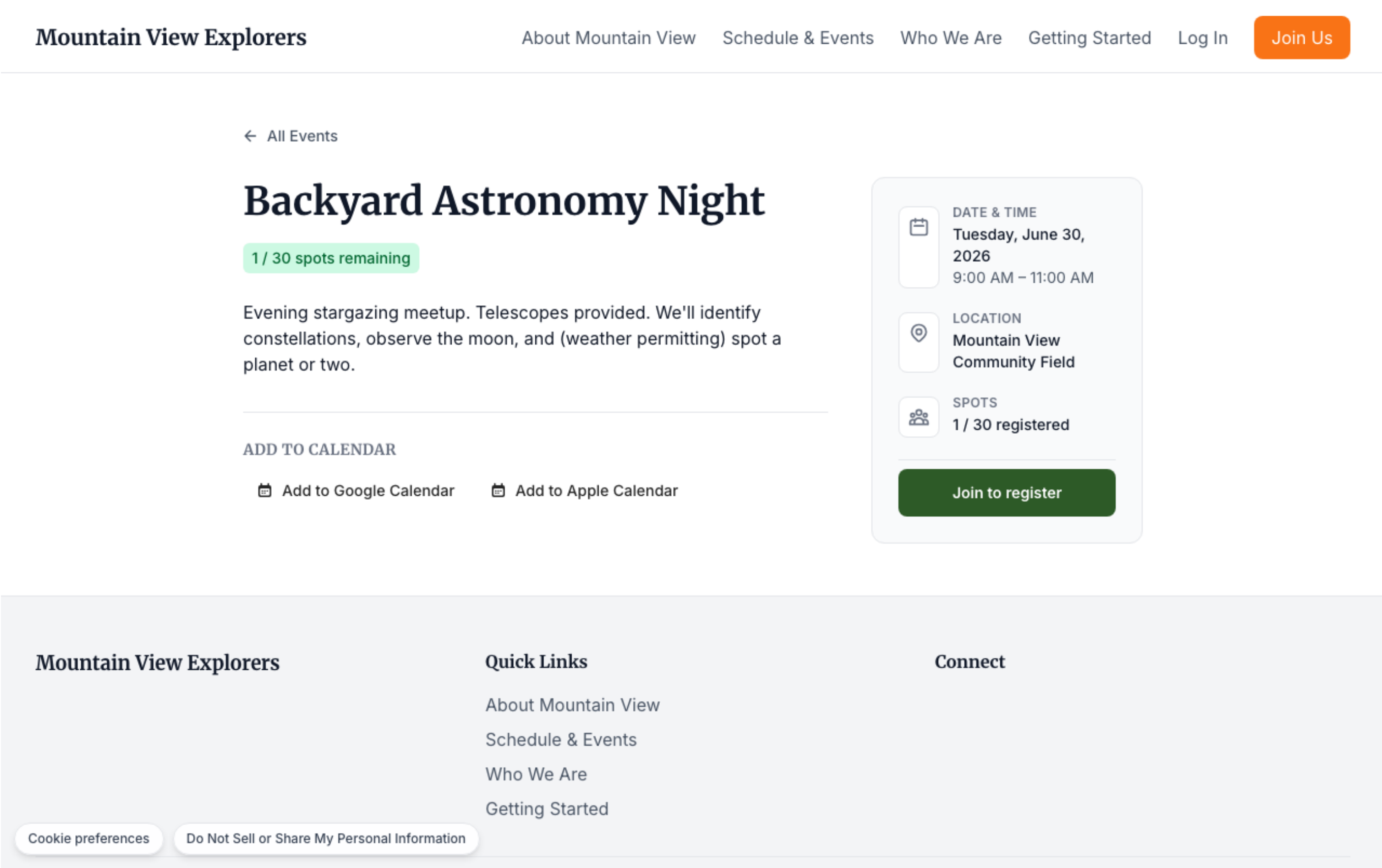
Step 9: Members find the event

Once published, the event appears on your co-op's **Events** page, which members access from their member dashboard.



Step 10: Members register

1. A member clicks the event name to open the event detail page.
2. They click **Register**.
    - For free events, registration is confirmed immediately and a confirmation email is sent.
    - For paid events, the member is taken to a secure checkout page. After payment, they receive a payment confirmation email.

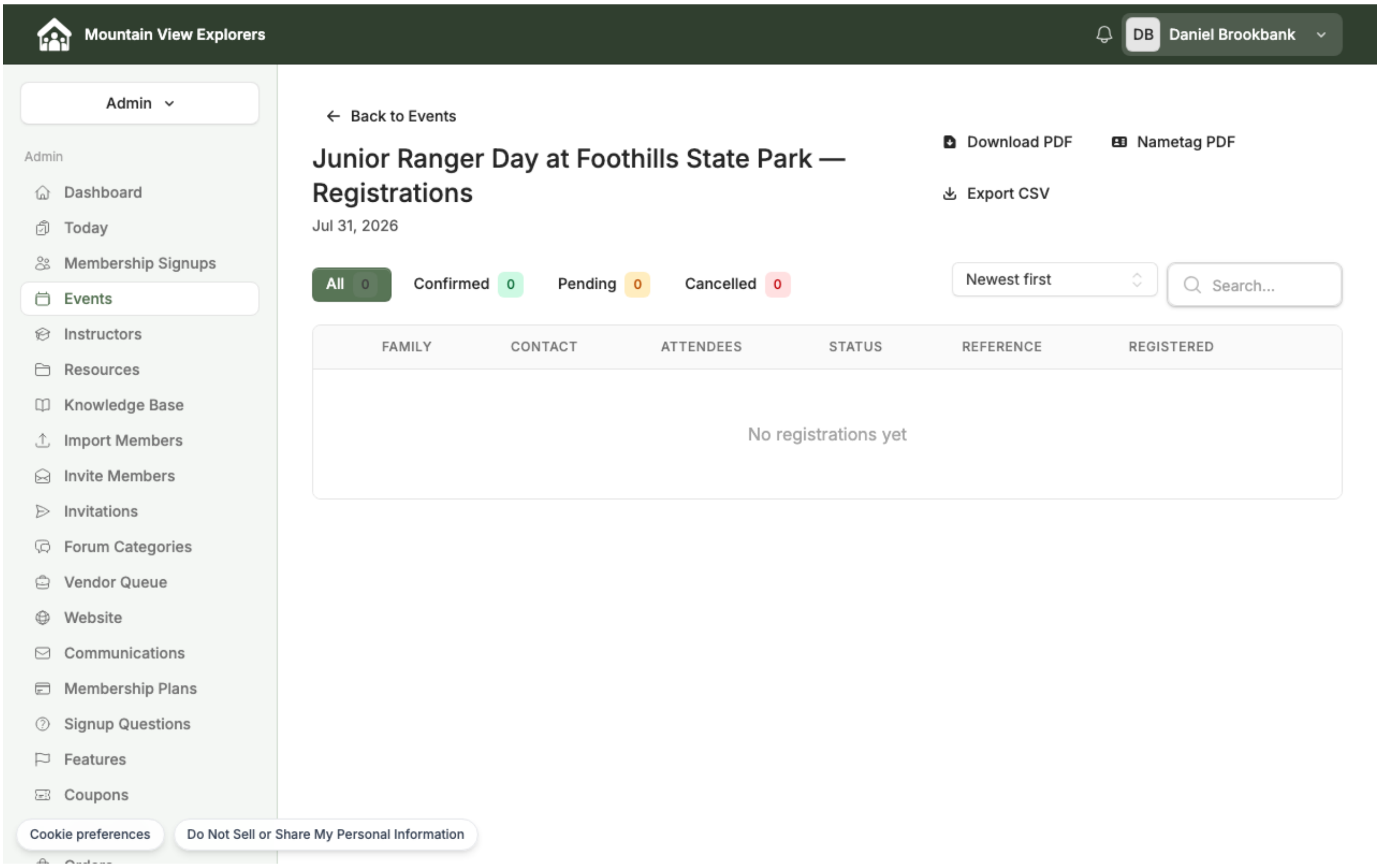


Members who are not signed in, or whose membership is not active, see a prompt to join or renew before they can register.

Tracking Registrations

After publishing, you can view who has signed up at any time:

1. From the **Events** list, click the event name.
2. Click **Registrations** in the admin tabs.



The registrations page shows each attendee's name, registration date, and payment status.

What's next

Now that your first event is live, consider:

- [How to Set Up Membership Plans and Recurring Payments](#) — make sure families are set up with an active plan before your event date
- Adding a recurring event series using the **Recurring event** toggle on the create form

How to Create an Event and Enable Member Registration

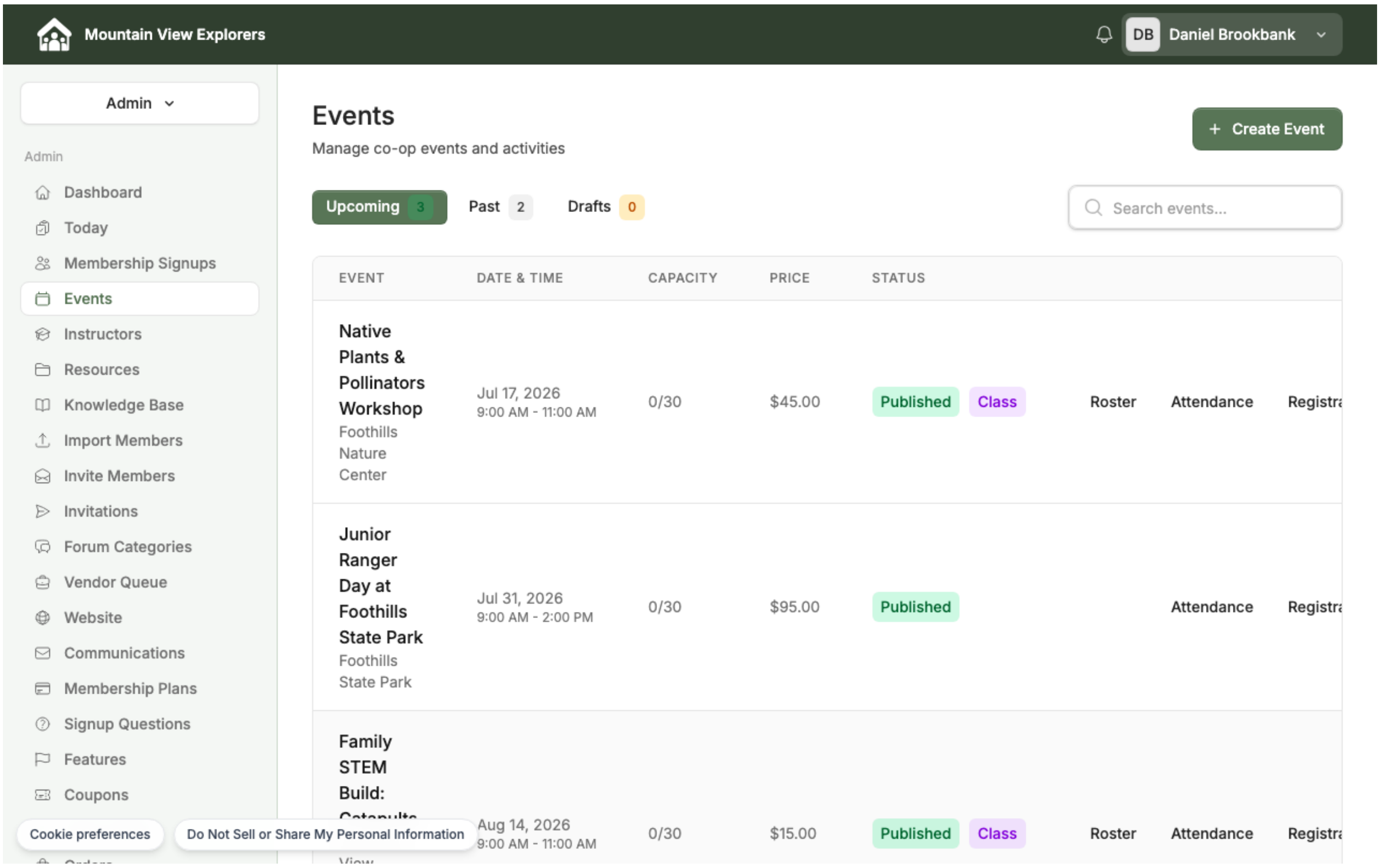
Overview

Events let you schedule activities — classes, field trips, co-op days — and give members a way to register directly through your site. This guide walks you through creating an event, configuring registration and pricing, publishing it, and what your members see when they sign up.

Before you start: Your co-op site must be active and your membership plans set up. If you are collecting payment for events, your Stripe account must be connected under **Payouts & Billing**.

Step 1: Navigate to Events

1. Sign in to your co-op admin panel.
2. In the left sidebar, click **Events**.

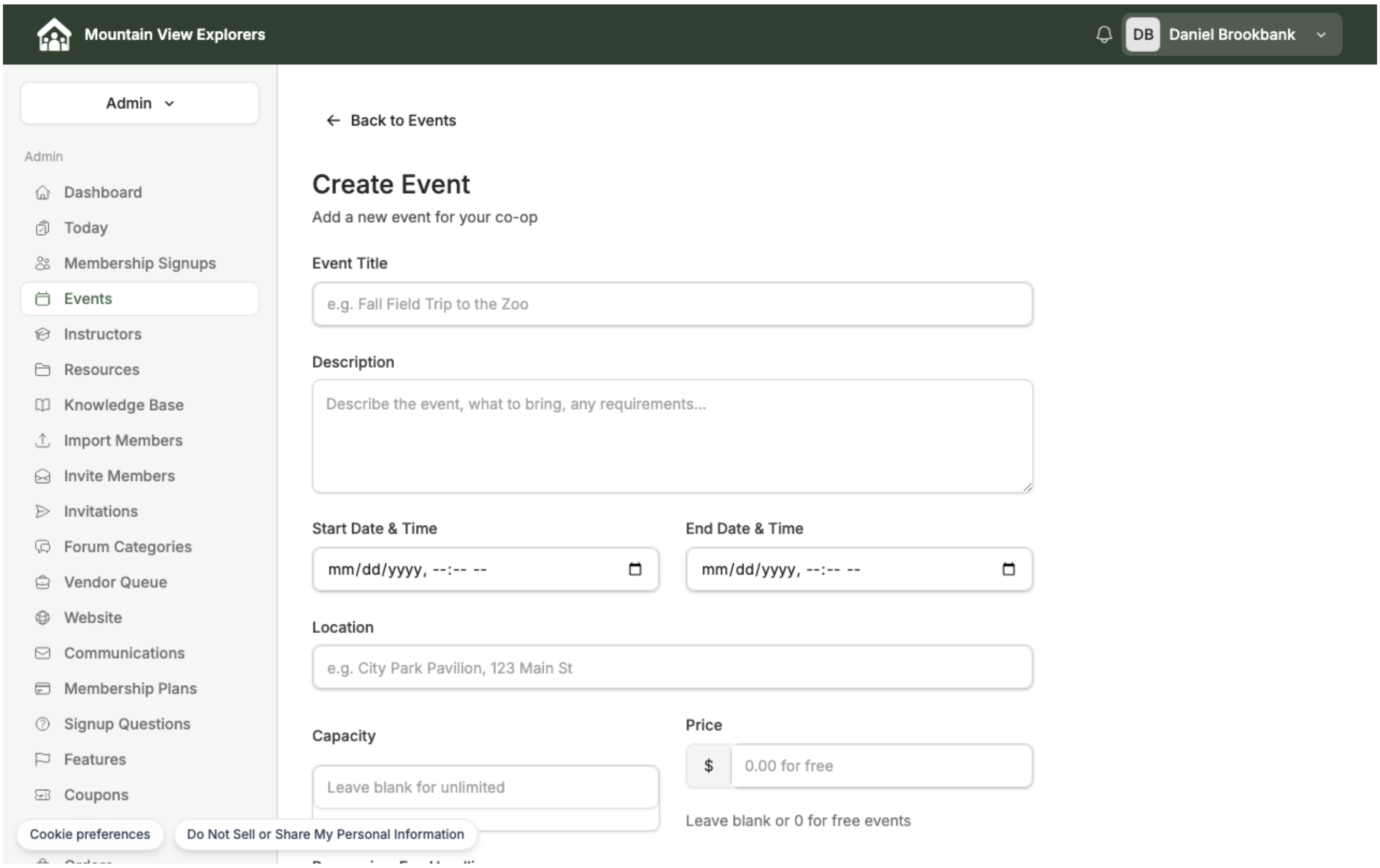


The Events page lists all your scheduled events. If you have not created any yet, you will see an empty state with a **New Event** button.

Step 2: Create a New Event

1. Click **New Event** (top-right corner, or the button in the empty state).

The event creation form opens.



2. Fill in the event details:

Field	What to enter
Title	A clear, recognizable name (e.g., "Spring Co-op Day", "Math Class — Week 12")
Date	The date the event takes place
Start Time / End Time	When the event begins and ends
Location	Physical address, room name, or "Online" for virtual events
Description	Details families need to know — what to bring, parking, etc.

Step 3: Configure Registration Settings

In the same form, scroll to the **Registration** section.

Setting	What it does

Enable Registration	Turn on so members can sign up for the event
Capacity	Maximum registrants. Leave blank for unlimited.
Registration Opens	Date and time when sign-ups become available
Registration Closes	Date and time when sign-ups close (optional)

Set **Enable Registration** to on. Enter a **Capacity** if your venue or session has a limit; otherwise leave it blank.

Step 4: Set Event Pricing

Under **Pricing**, choose whether the event is free or paid.

Free event

Select **Free**. Members register at no cost. No Stripe connection is required.

Paid event

Select **Paid** and enter the price in dollars.

When members complete registration for a paid event, they receive a payment confirmation by email. Their payment receipt is available under **My Registrations** in their member account.

> **Note:** Use the **Free** option for $0 events rather than entering a price of $0.00. This keeps the registration flow simple and avoids unnecessary Stripe processing.

Step 5: Publish the Event

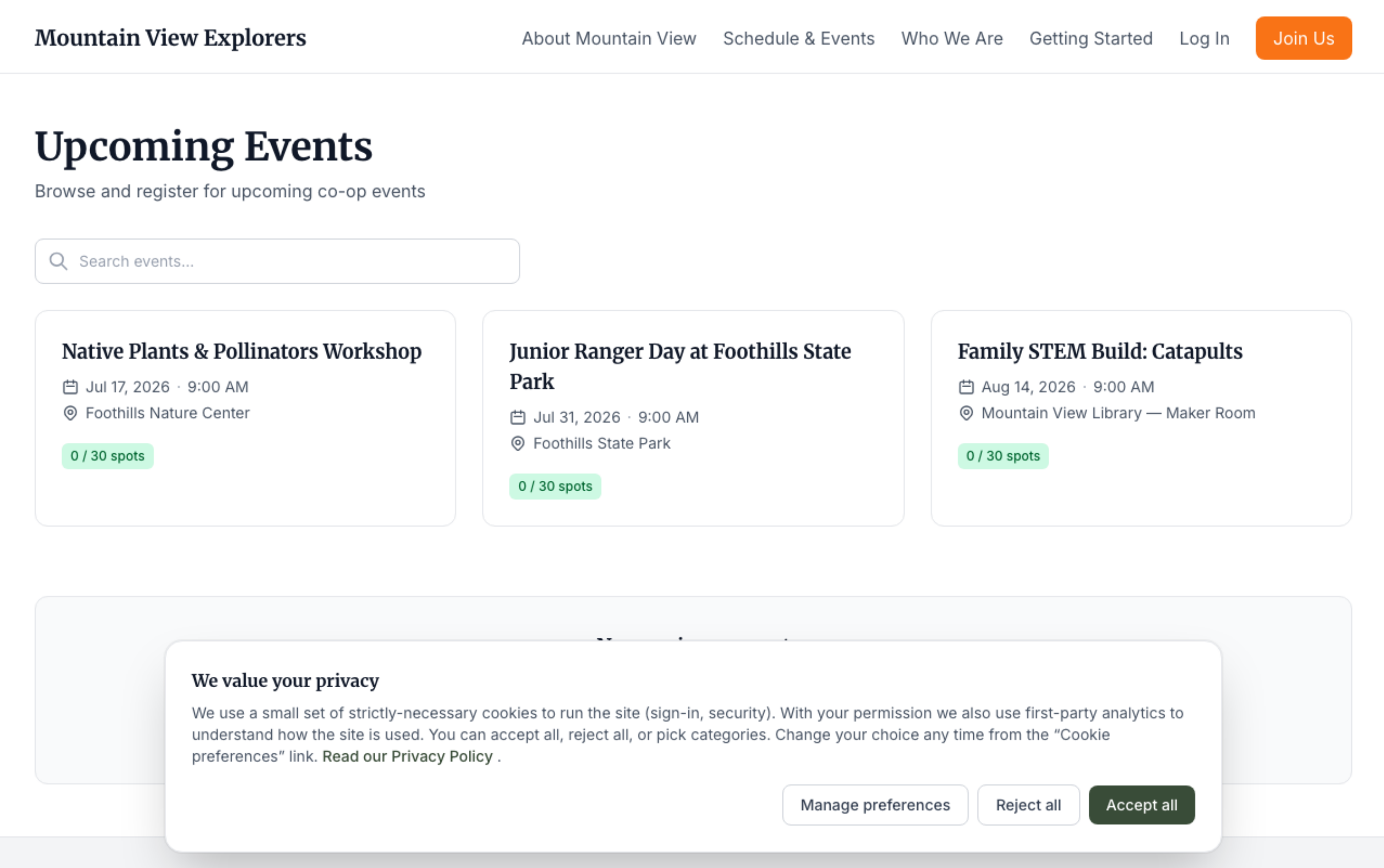
1. Once all settings are filled in, click **Publish Event**.

The event is now live on your co-op site. Members can see it on the public **Events** page and register from there.

> **Tip:** To save your work and return later without making the event visible to members, click **Save Draft** instead. Drafts appear only in the admin panel.

Step 6: Member Registration Experience

Here is what a member sees when they visit your Events page.



1. The member clicks the event title or a **Register** button.
2. The event detail page shows the date, time, location, and description.
3. For free events, the member clicks **Register**.
   For paid events, the member clicks **Register & Pay** and enters payment details on a secure Stripe checkout page.
4. After completing registration, the member receives a payment confirmation by email and can view their spot under **My Registrations**.

Next Steps

- To view who has registered and track attendance, see How to Manage Registrations and Track Attendance.
- To contact registered members, see How to Send Newsletters and Announcements.

How to Manage Your Co-op Calendar

Overview

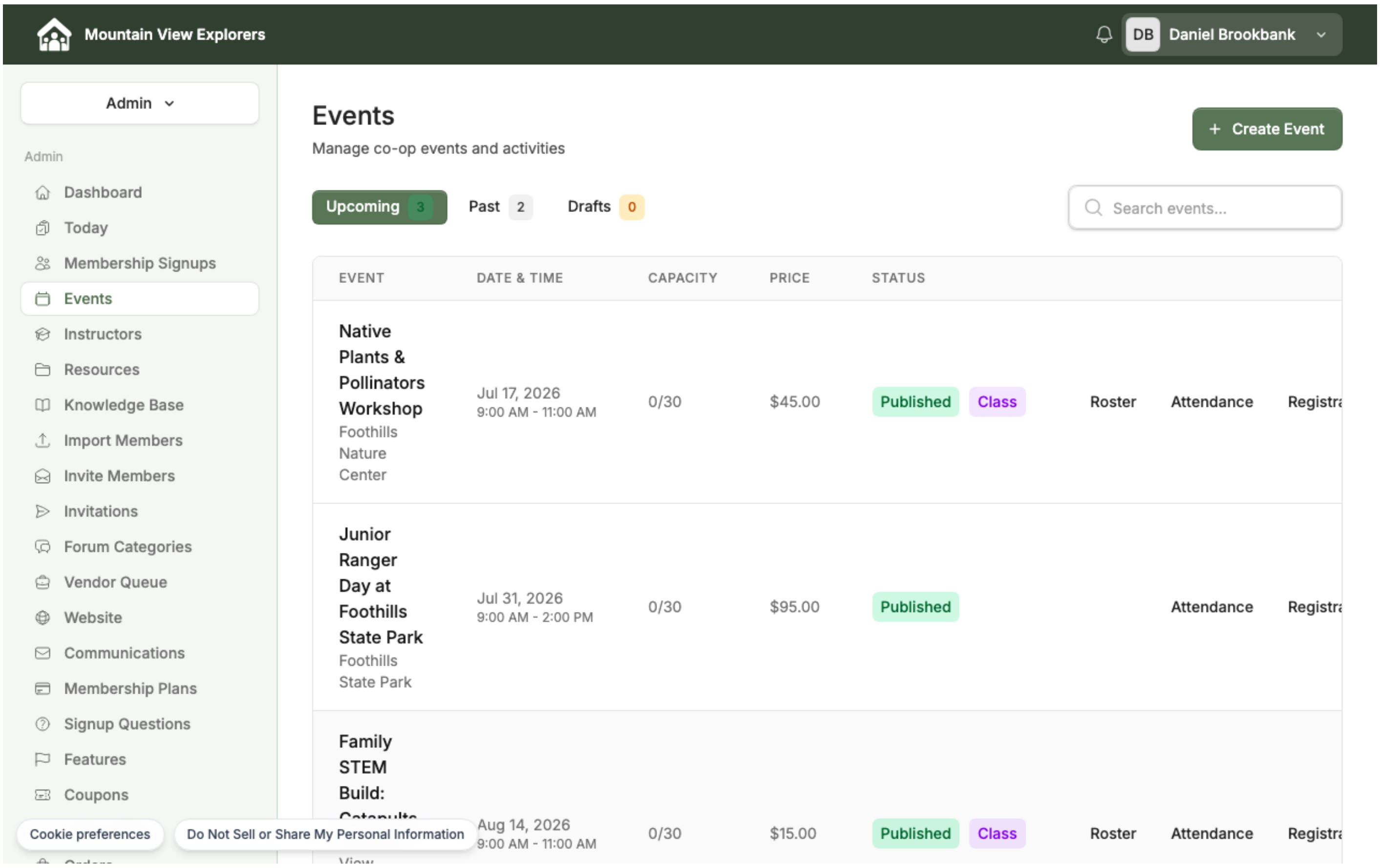
CooplyHQ gives your co-op two calendar tools that work together:

- The **Admin Events list** — where you create and manage events
- The **Public Event Calendar** — a month-view grid where members and families browse your schedule

This guide covers both.

Step 1: Open the Events list in your admin panel

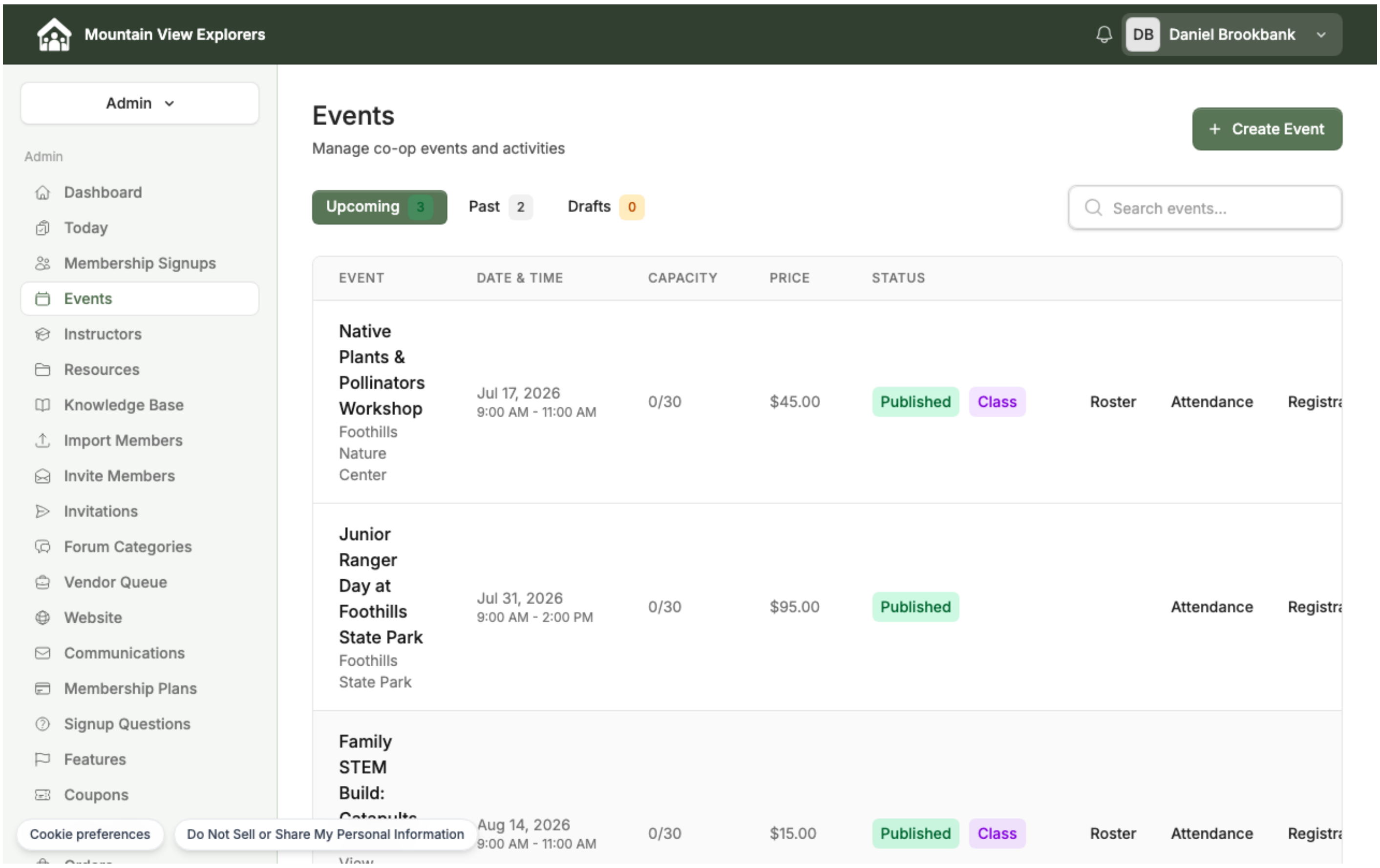
1. Sign in to your admin panel.
2. In the left sidebar, click **Events**.



The Events page is your central place to manage your co-op's schedule. Every event you publish here appears on the public Event Calendar.

Step 2: Understand what is on your calendar

The Events list organizes all your events by status using three tabs.



Tab	What it shows
Upcoming	Published events with a future date — visible to members
Past	Events that have already occurred
Drafts	Events saved but not yet published — admin-only

Each event row shows:

- Event name and location
- Date and start/end time
- Capacity (spots taken / total)
- Price (Free or paid amount)
- Status badge (Published or Draft)

Use the **Search events** box to filter by keyword when your list grows long.

Step 3: Add a new event to your calendar

1. On the Events page, click **+ Create Event** (top right).
2. Fill in the event details.
3. Click **Publish Event** to make it visible to members.

> **Note:** Events are added and edited from the admin Events page. The public calendar grid is view-only — it cannot be used to create or edit events.

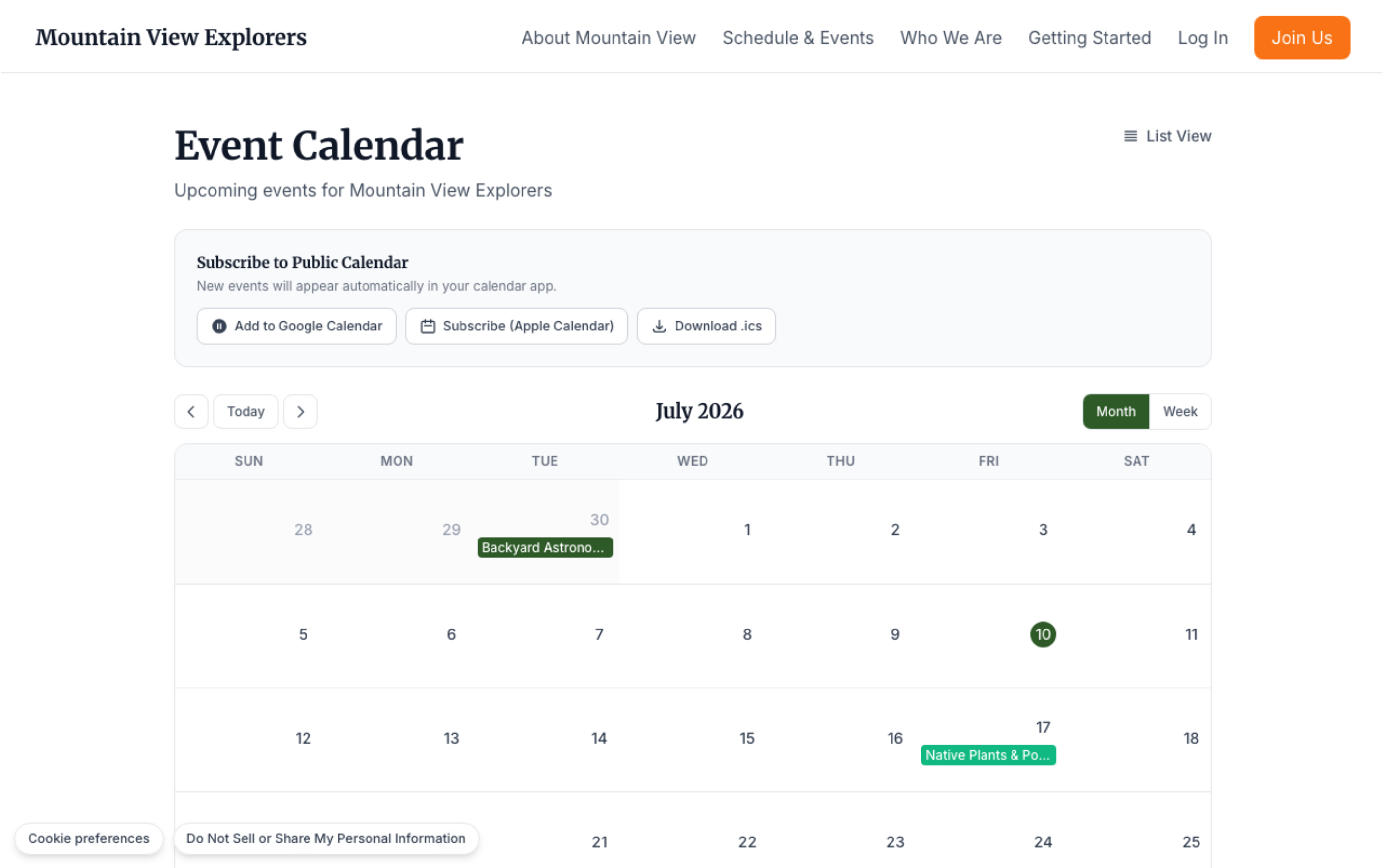
For full event creation instructions, see How to Create an Event and Enable Member Registration.

Step 4: View the public Event Calendar — what families see

Members and families browse your schedule at:

yoursite.cooplyhq.com/calendar

To view it yourself, click your co-op's name in the top-left corner of the admin panel to open your public site, then navigate to **Schedule & Events** in the top navigation.



The public Event Calendar shows:

- A **month grid** with published events placed on their dates
- Navigation arrows (**<** and **>**) to move forward and backward by month or week
- A **Today** button to return to the current date
- A **Week** button to switch to a week-by-week layout

Subscribe to the calendar

At the top of the calendar page, families see a **Subscribe to Public Calendar** section.

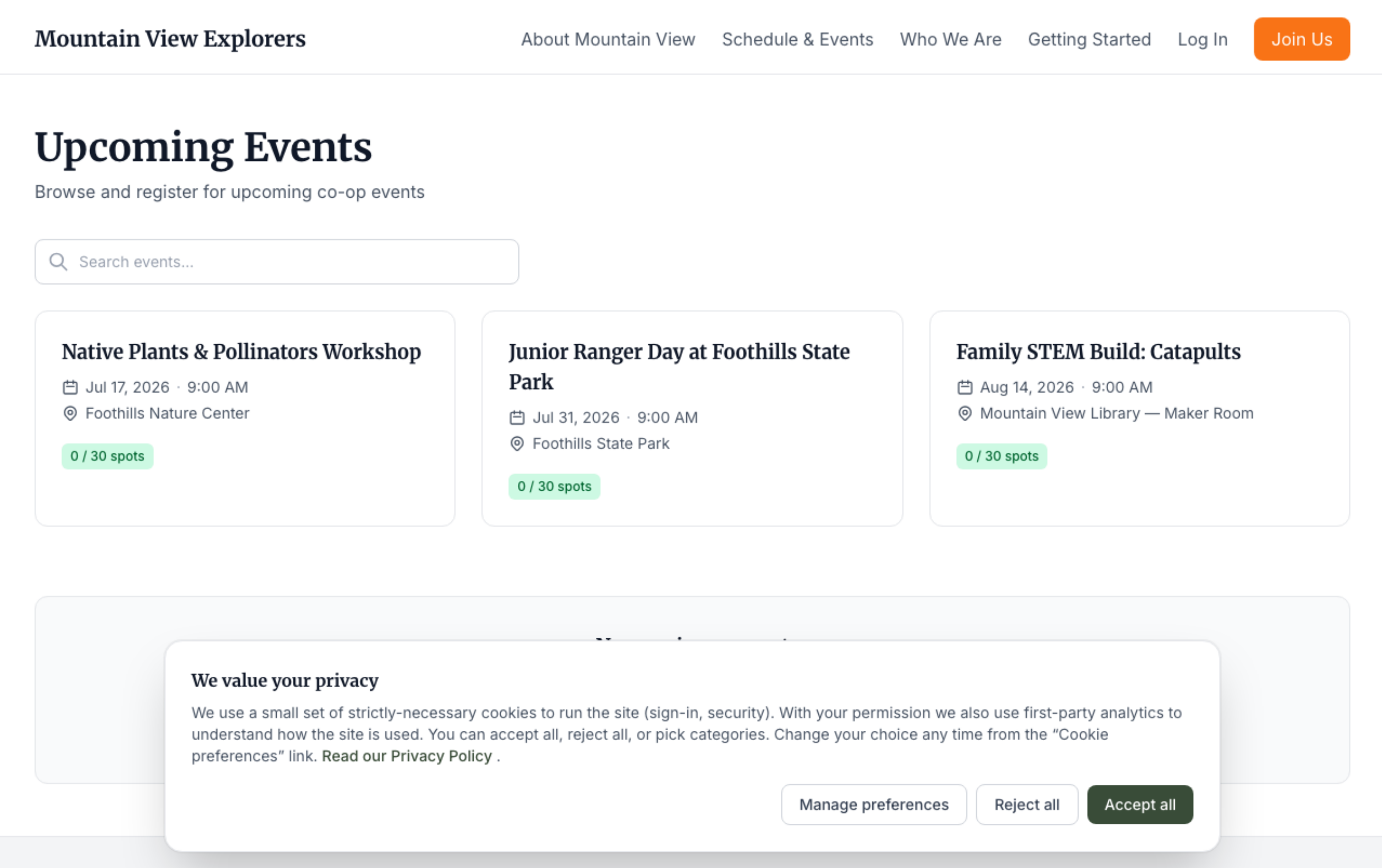
Option	What it does
Add to Google Calendar	Subscribes to your co-op's live calendar — new events appear automatically
Subscribe (Apple Calendar)	Subscribes in Apple Calendar or any compatible calendar app
Download .ics	Downloads a snapshot of current events in iCal format

Sharing this subscription option with families means they always see your latest events without checking your site manually.

Step 5: Browse upcoming events in list format

Families can also view your events as a searchable list at:

yoursite.cooplyhq.com/events



Each event card shows:

- Event name
- Date, time, and location
- Spots remaining (e.g., "4 / 30 spots")

Members can use the **Search events** box to filter by keyword. To register, they click the event card and follow the steps on the event detail page.

Next Steps

- To create a new event, see How to Create an Event and Enable Member Registration.
- To review who has registered for an event, see How to Manage Registrations and Track Attendance.

How to Invite Families and Manage Your Member Directory

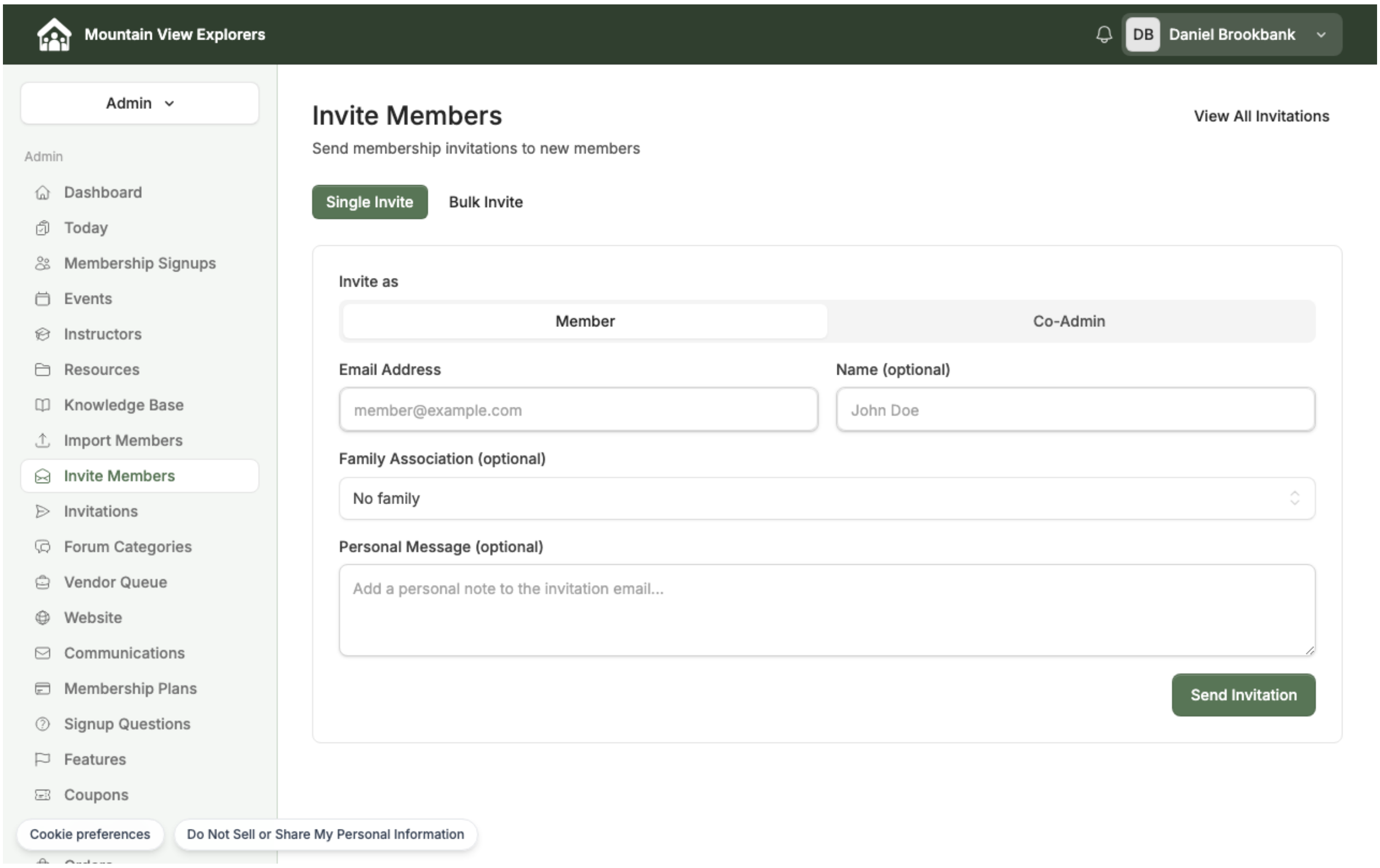
Overview

Once your co-op site is set up, you are ready to bring families on board. This guide covers:

- Sending a membership invitation to a family
- What the invited family sees when they follow the link
- Tracking invitation status
- Viewing and searching the member directory
- Opening a member record and updating a member's role

Step 1: Send an invitation

1. Sign in to your admin panel.
2. In the left sidebar, click **Invite Members**.



The **Invite Members** page opens with the **Single Invite** tab selected.

3. Under **Invite as**, choose the role you are assigning:

Option	Who it is for
Member	A family joining to participate in co-op activities
Co-Admin	A trusted parent you want to help manage the co-op

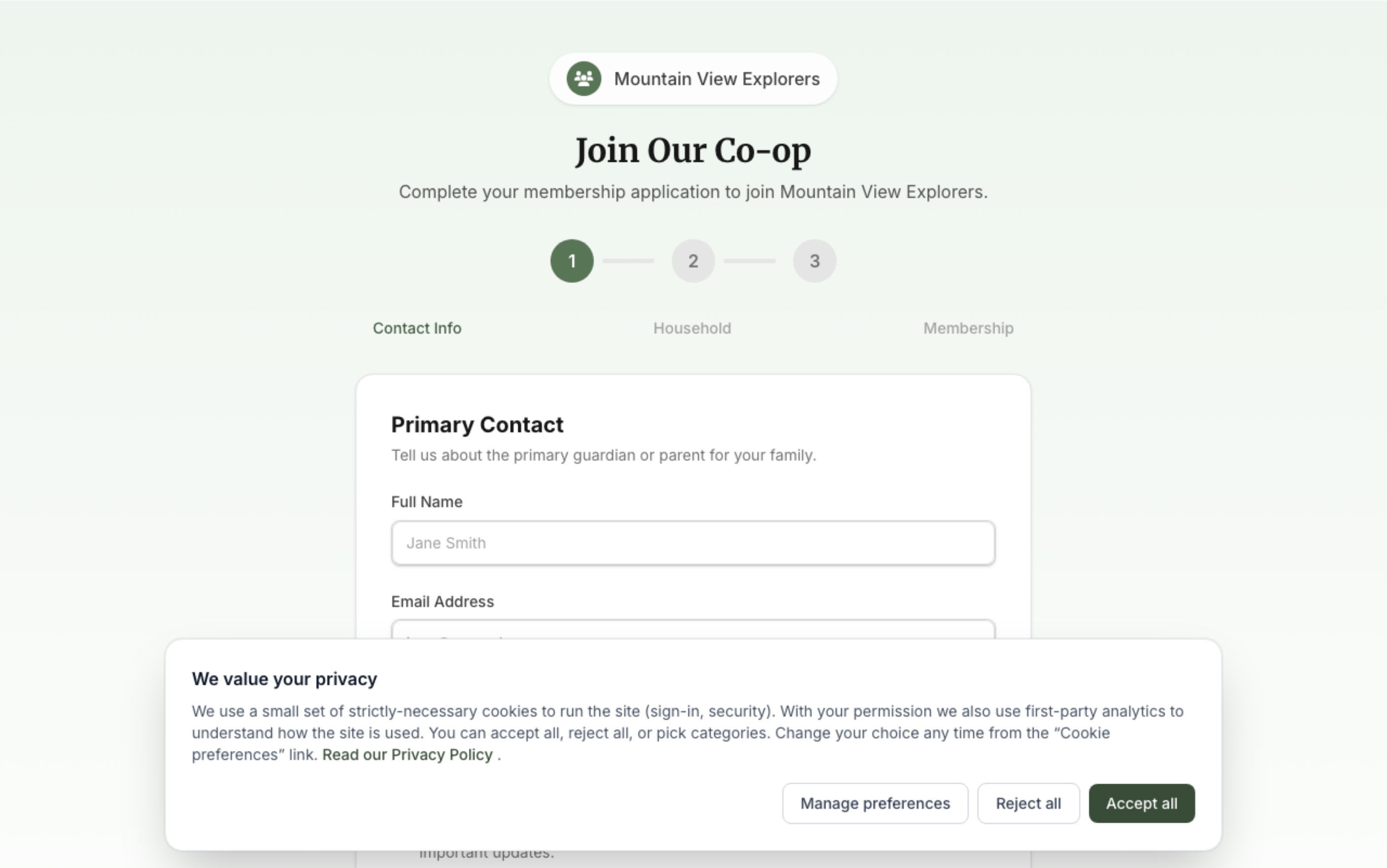
4. Enter the family's **Email Address** (required).
5. Optionally, add the family's **Name** and select their **Family Association** from the dropdown if you have families already set up.
6. Optionally, type a short note in the **Personal Message** field — this appears in the invitation email.
7. Click **Send Invitation**.

CooplyHQ sends the family an email with a link to complete their membership application.

> **Tip:** To invite several families at once, click the **Bulk Invite** tab and follow the on-screen instructions.

Step 2: What the family sees

When a family receives the invitation email and clicks the link, they arrive at your co-op's membership application.



The application walks the family through three steps:

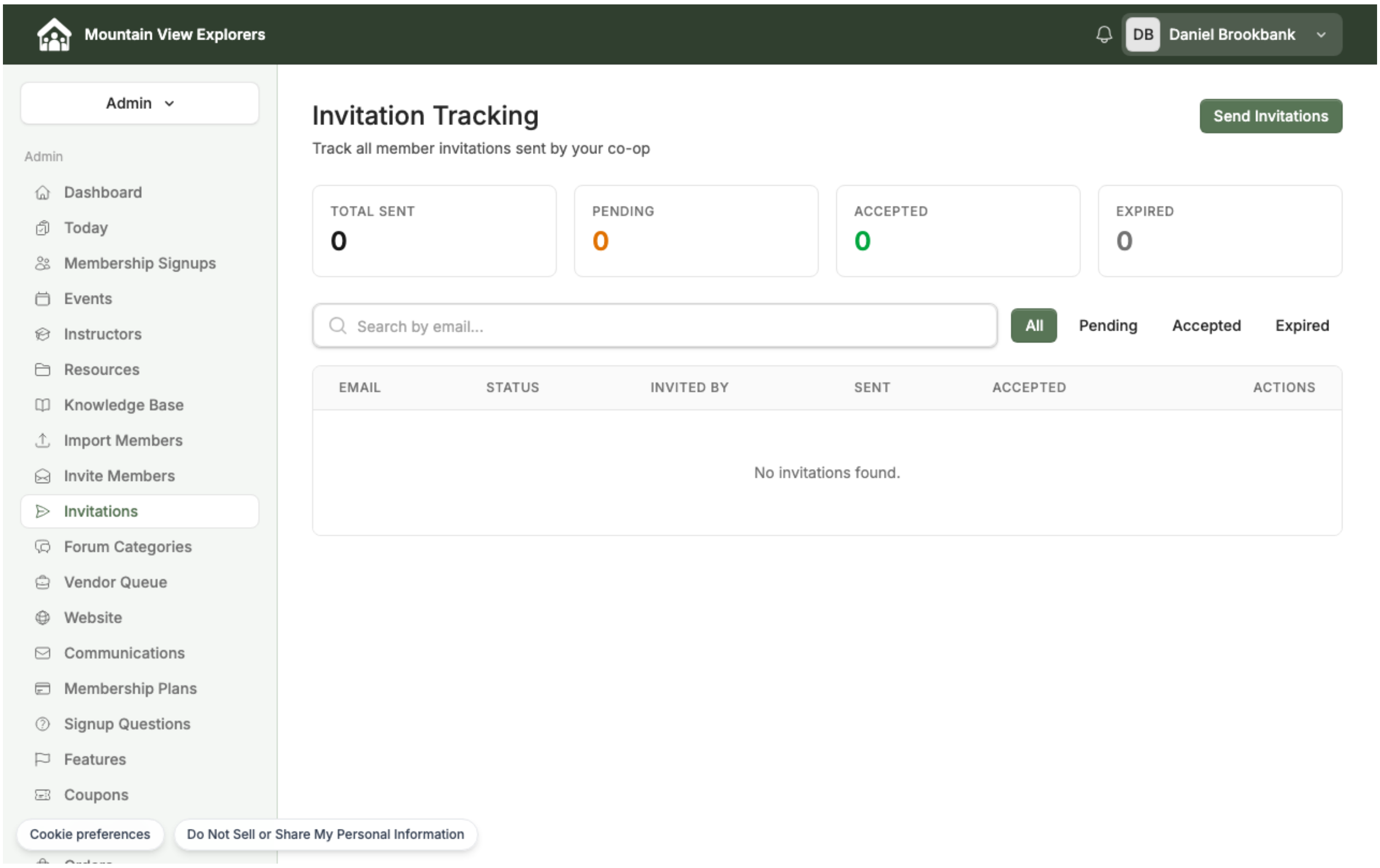
1. **Contact Info** — primary guardian's name, email address, and phone number
2. **Household** — adding children and other household members
3. **Membership** — selecting a membership plan and completing payment (if applicable)

Once submitted, the family appears in your **Membership Signups** queue for approval.

Step 3: Track invitations

To see the status of every invitation you have sent:

1. In the left sidebar, click **Invitations**.



The **Invitation Tracking** page shows summary counts at the top:

Counter	Meaning
Total Sent	All invitations ever sent
Pending	Sent but not yet accepted
Accepted	Family completed their application
Expired	Invitation link is no longer valid

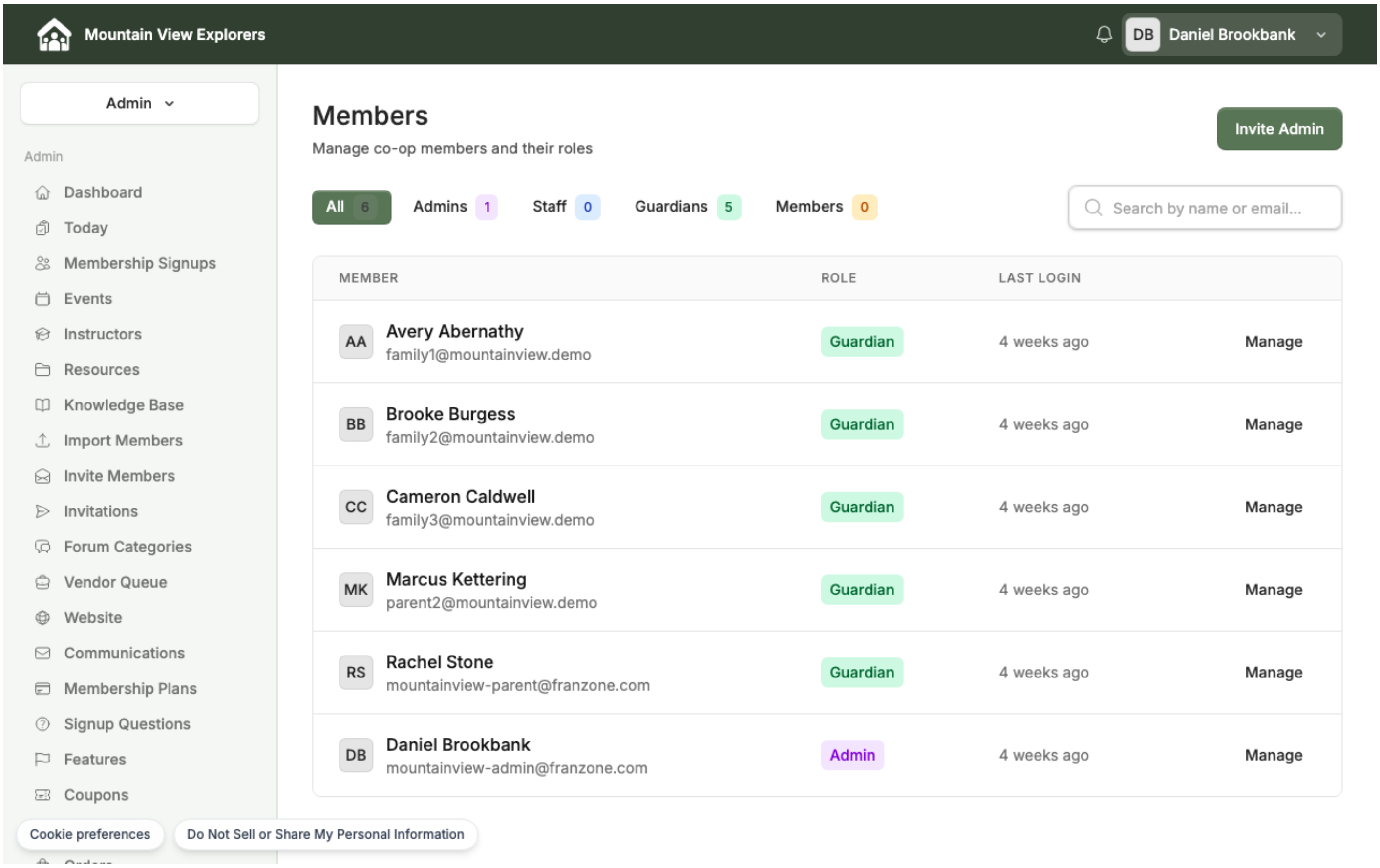
Use the **Search by email** box to find a specific invitation, or use the **All / Pending / Accepted / Expired** filter tabs to narrow the list.

From the **Actions** column you can resend or cancel individual invitations.

Step 4: View the member directory

The member directory shows every person who has joined your co-op.

1. Go to your admin **Dashboard**.
2. In the dashboard widgets, click **Active Families** to open the member directory.



The **Members** page shows a table with each member's name, email, role, and the date they last logged in.

Filter by role

Use the filter buttons at the top of the list to show only members with a specific role:

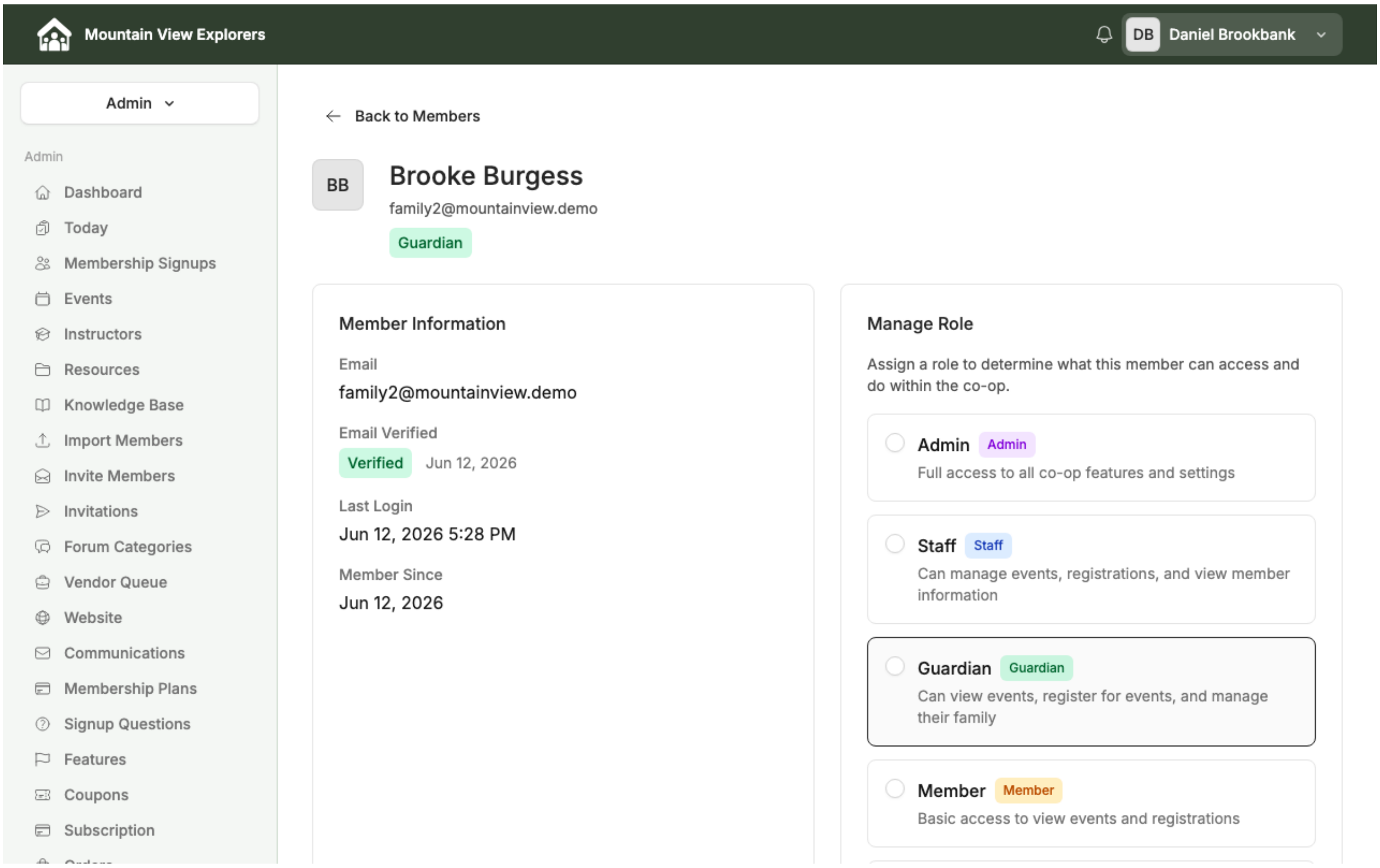
Filter	Who it shows
All	Every member, regardless of role
Admins	Co-op administrators
Staff	Staff members who help manage events and registrations
Guardians	Parents and guardians who have completed membership
Members	Members with basic access

Search by name or email

Type in the **Search by name or email** box to filter the list as you type. This is useful when your co-op has many members and you are looking for a specific person.

Step 5: Open a member record

1. In the member directory, find the person you want to view.
2. Click **Manage** on their row.



The member detail page shows two sections:

Member Information

Field	What it shows
Email	The member's login email address
Email Verified	Whether the email has been verified, and when
Last Login	The date and time of their most recent sign-in
Member Since	The date their account was created

Manage Role

The current role is highlighted. See Step 6 to change it.

Step 6: Change a member's role

1. On the member detail page, find the **Manage Role** section.
2. Select the role you want to assign:

Role	Access level
Admin	Full access to all co-op features and settings
Staff	Can manage events, registrations, and view member information
Guardian	Can view events, register for events, and manage their family
Member	Basic access to view events and registrations

3. Click **Update Role**.

A confirmation message appears when the role is saved.

Next steps

- To approve a family's membership application after they sign up, see **How to Review and Approve Membership Signups**.
- To create an event for your members to register for, see How to Create an Event and Enable Member Registration.

How to Configure Your Co-op Settings

Overview

Before inviting families to your co-op, take a few minutes to configure your co-op's identity. CooplyHQ gives you two places to do this:

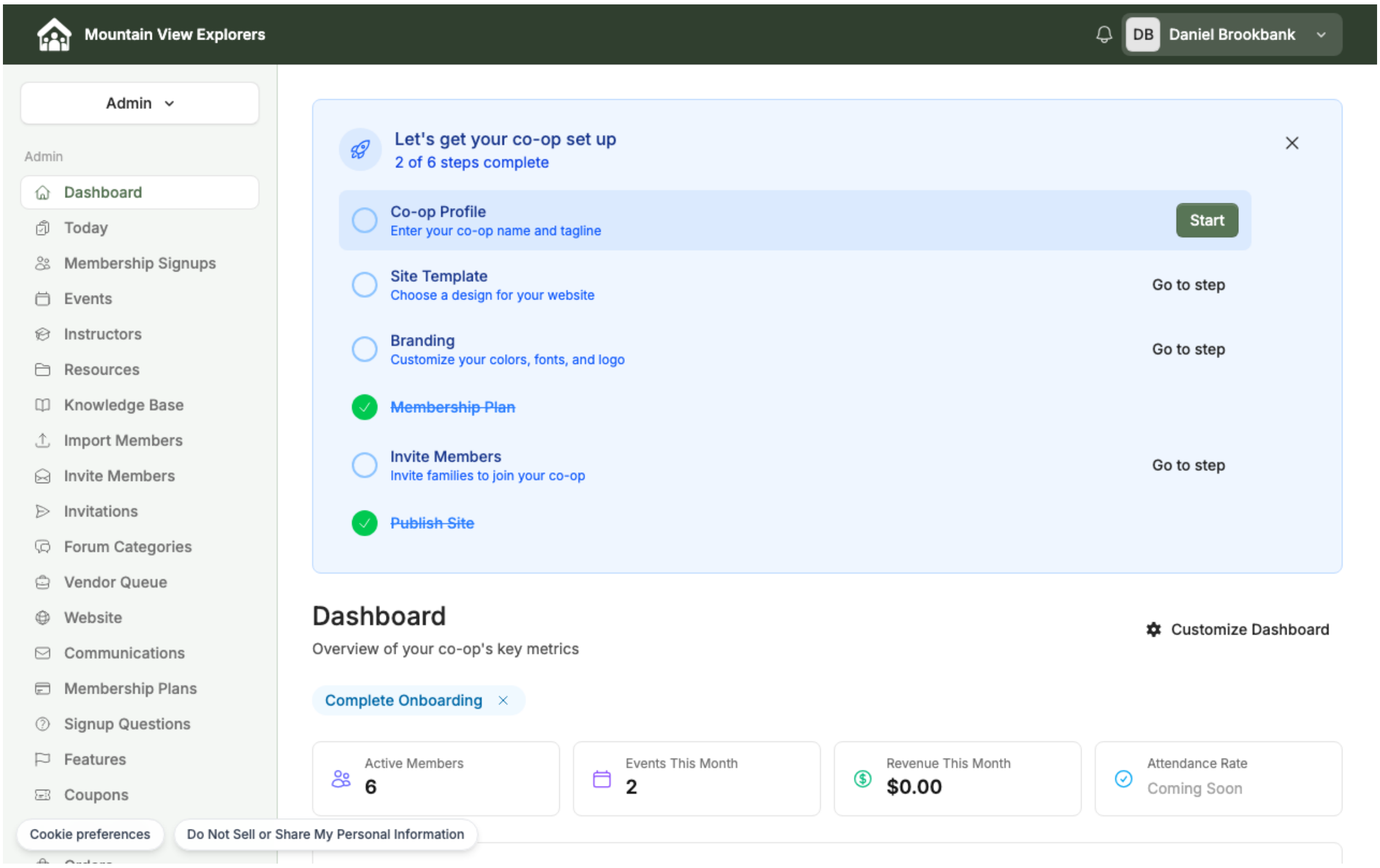
- **Co-op Profile** (in the setup wizard on your dashboard) — set your co-op's name and tagline
- **Website > Site Settings** — configure your logo, contact email, header display, and signup options

This guide walks through both.

Step 1: Set your co-op name and tagline

When you first log in, your dashboard shows a **"Let's get your co-op set up"** card. This is your setup checklist.

1. Sign in to your admin panel at `yourcoopname.cooplyhq.com`.
2. On the **Dashboard**, locate the setup checklist card.
3. Click **Start** next to **Co-op Profile**.

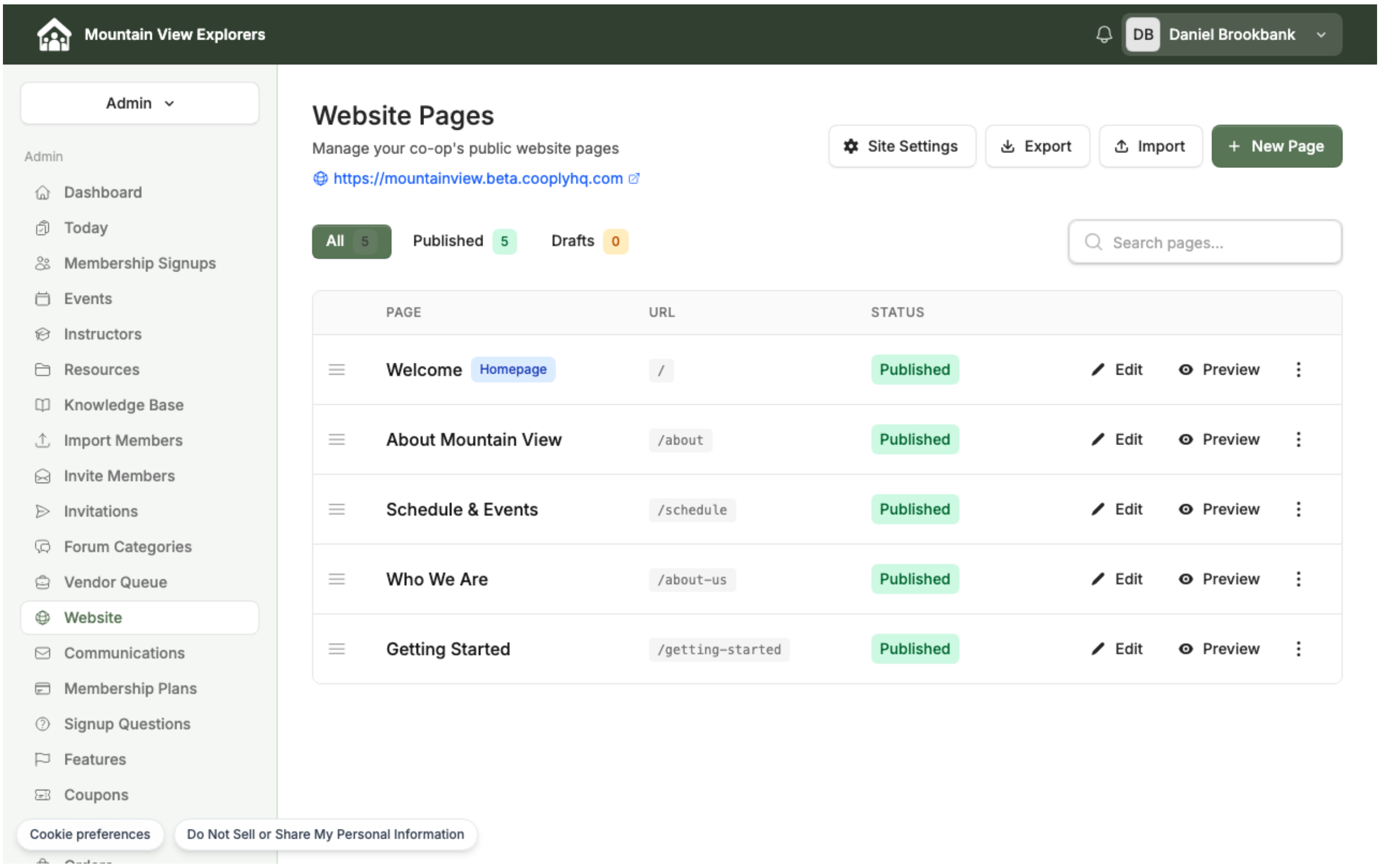


4. In the dialog that opens, enter your **Co-op Name** (required). This name appears on your website and throughout the admin panel.
5. Optionally, enter a **Tagline** — a short phrase describing your co-op (for example, "Learning together, growing together").
6. Click **Next** to save and continue with the setup wizard, or close the dialog to return to the dashboard.

Step 2: Navigate to Site Settings

Your website branding settings — logo, contact email, header display, and more — live in the **Website** section.

1. In the left sidebar, click **Website**.

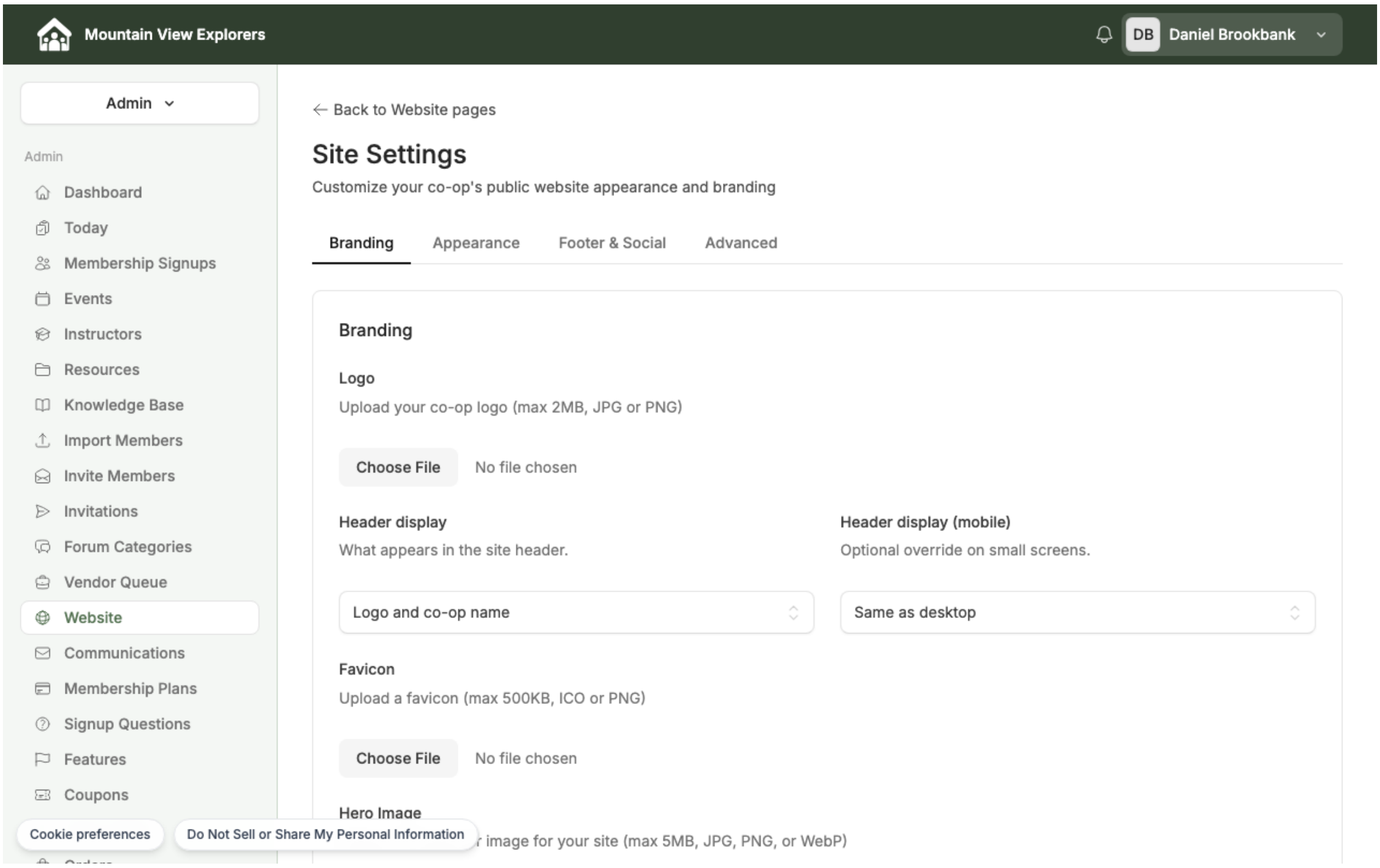


2. On the Website Pages screen, click **Site Settings** in the top right corner.

The **Site Settings** page opens on the **Branding** tab.

Step 3: Configure branding settings

The Branding tab has four sections:



Logo

Upload your co-op's logo (max 2 MB, JPG or PNG). This image appears in your public website header.

Header display

Choose what appears in your website's header:

Option	What visitors see
Logo and co-op name	Your logo image next to your co-op's name
Logo only	Your logo image, no text
Co-op name only	Your co-op's name in text, no logo

You can also set a separate **Header display (mobile)** if you want a different layout on small screens. Leave it set to **Same as desktop** to use one setting for all devices.

Favicon

Upload a small browser-tab icon for your website (max 500 KB, ICO or PNG).

Hero Image

Upload a default banner image that appears at the top of your website's homepage (max 5 MB, JPG, PNG, or WebP).

Tagline and Contact Email

Scroll down past the image uploads to find two text fields:

- **Tagline** — A short description of your co-op, displayed on your public website. If you already entered a tagline in the setup wizard, it appears here pre-filled.
- **Contact Email** — A public contact email address shown on your website (for example, `info@yourcoopname.org`).

Step 4: Configure signup settings

Still on the Branding tab, scroll to the **Signup Settings** section:

- **Enable Signup Button** — Toggle this on to show a "Join Us" button in your website header, which families can click to apply for membership.
- **Button Text** — Customize the label on the signup button (default: "Join Us").

If you are not yet ready to accept new members, turn the toggle off.

Step 5: Save your settings

Click **Save Settings** at the bottom of the page. A confirmation message appears at the top of the screen confirming your changes were saved.

What's next

Now that your co-op's settings are configured, you're ready to invite families. See How to Invite Families and Manage Your Member Directory for next steps.

How to View and Manage Membership Payments

Overview

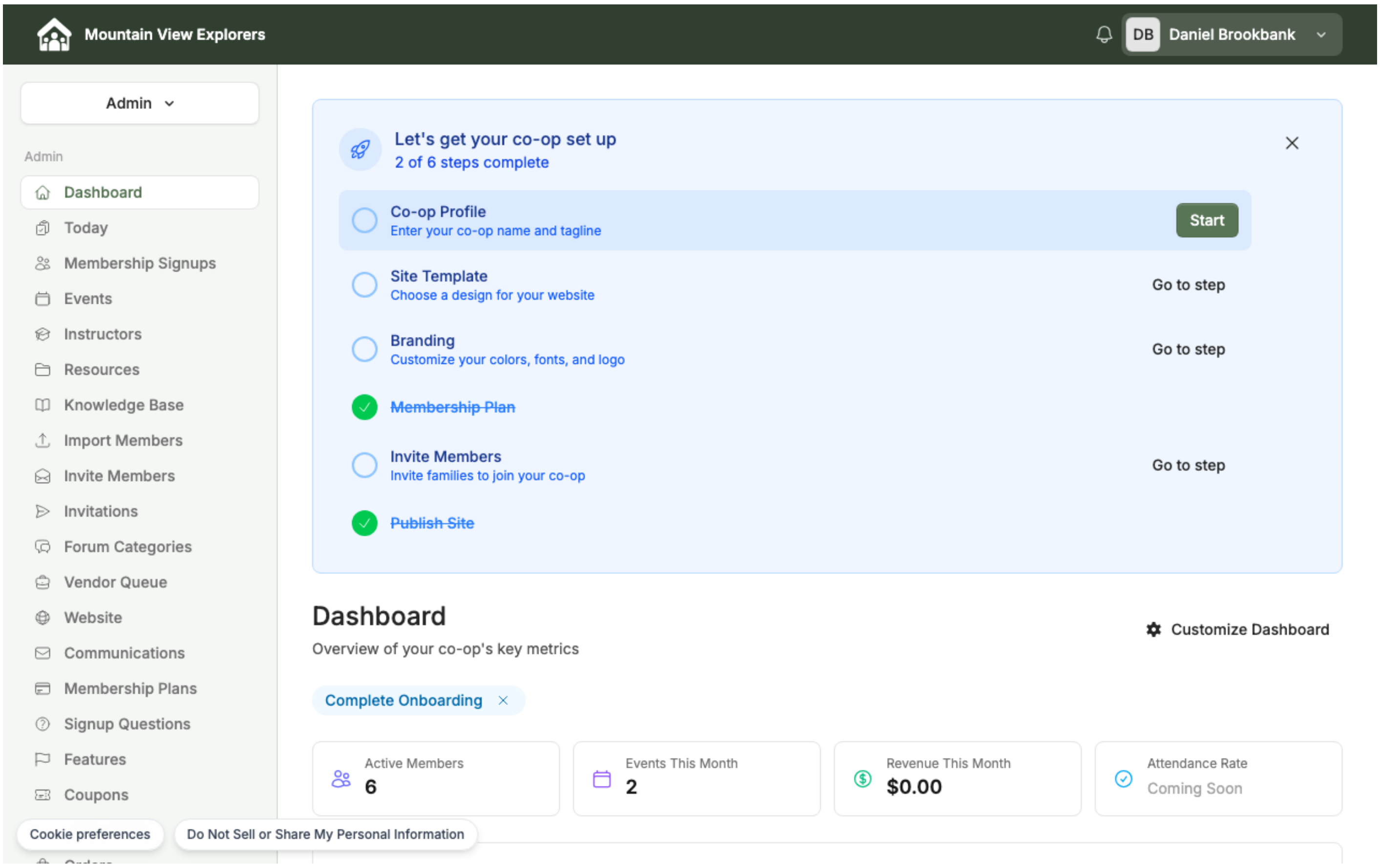
The **Orders** and **Payouts** sections in your admin panel let you track all membership payment activity and monitor funds deposited to your bank.

- **Orders** — every payment transaction tied to your membership plans
- **Payouts** — the Stripe transfer history showing when collected funds hit your bank account

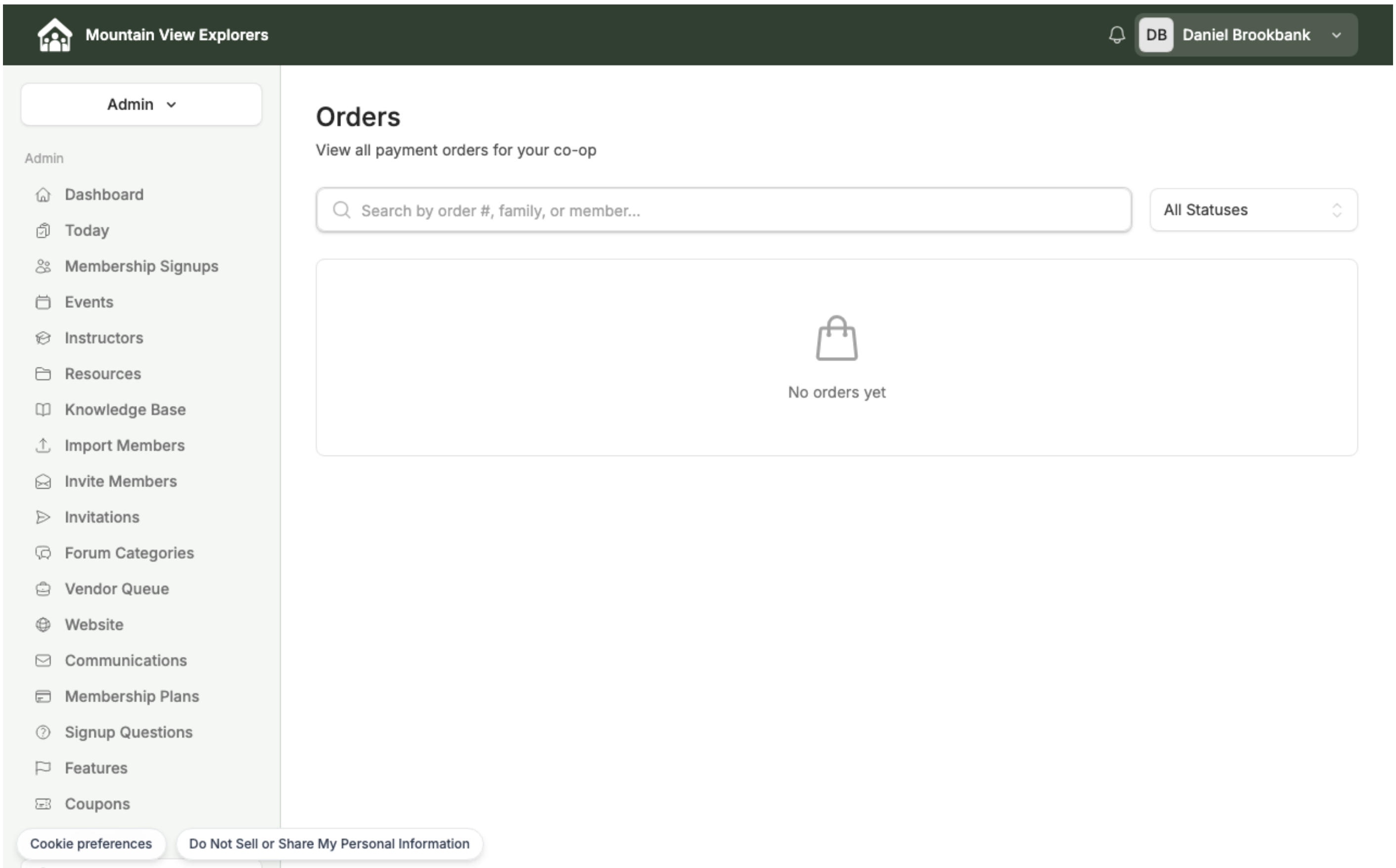
> **Note:** The screenshots below were captured before any membership payments were processed. Screenshots showing populated order rows, order detail views, and payout history will be added once active payment data is available.

Step 1: Open the Orders page

1. Sign in to your admin panel at `yourcoopname.cooplyhq.com`.
2. In the left sidebar, scroll down and click **Orders**.



The **Orders** page opens. When families have completed checkout, each payment appears as a row in the list.



Step 2: Understand the Orders list

Once payments exist, each row in the Orders list shows:

Column	What it shows
Date	When the order was placed
Order #	Unique reference number for the payment
Family	The family who made the payment
Type	The membership plan purchased
Amount	Payment amount charged
Status	Current payment status

Payment statuses:

Status	Meaning
Active	Payment succeeded; membership is in good standing
Past due	A renewal charge failed; the membership may lapse if not resolved
Failed	The payment attempt did not go through
Canceled	The membership was canceled

> **Populated order list screenshot coming soon.** This will be added after Stripe is connected and families have completed checkout.

Step 3: Search and filter orders

Use the controls at the top of the Orders list to find a specific payment:

- **Search bar** — type an order number, family name, or member name to narrow the list
- **All Statuses dropdown** — filter to a specific status (for example, select **Failed** to see all payments that need attention)

Step 4: View an individual order

Click any order row to open the order detail view. The detail view shows:

- Order number, date, and membership plan
- Family and member name
- Payment amount and payment method on file
- Full payment history for that order, including any retry attempts

> **Order detail screenshot coming soon.** This will be added once orders exist in the demo account.

Step 5: Handle a failed payment

When a renewal payment fails, CooplyHQ and Stripe handle the initial response automatically:

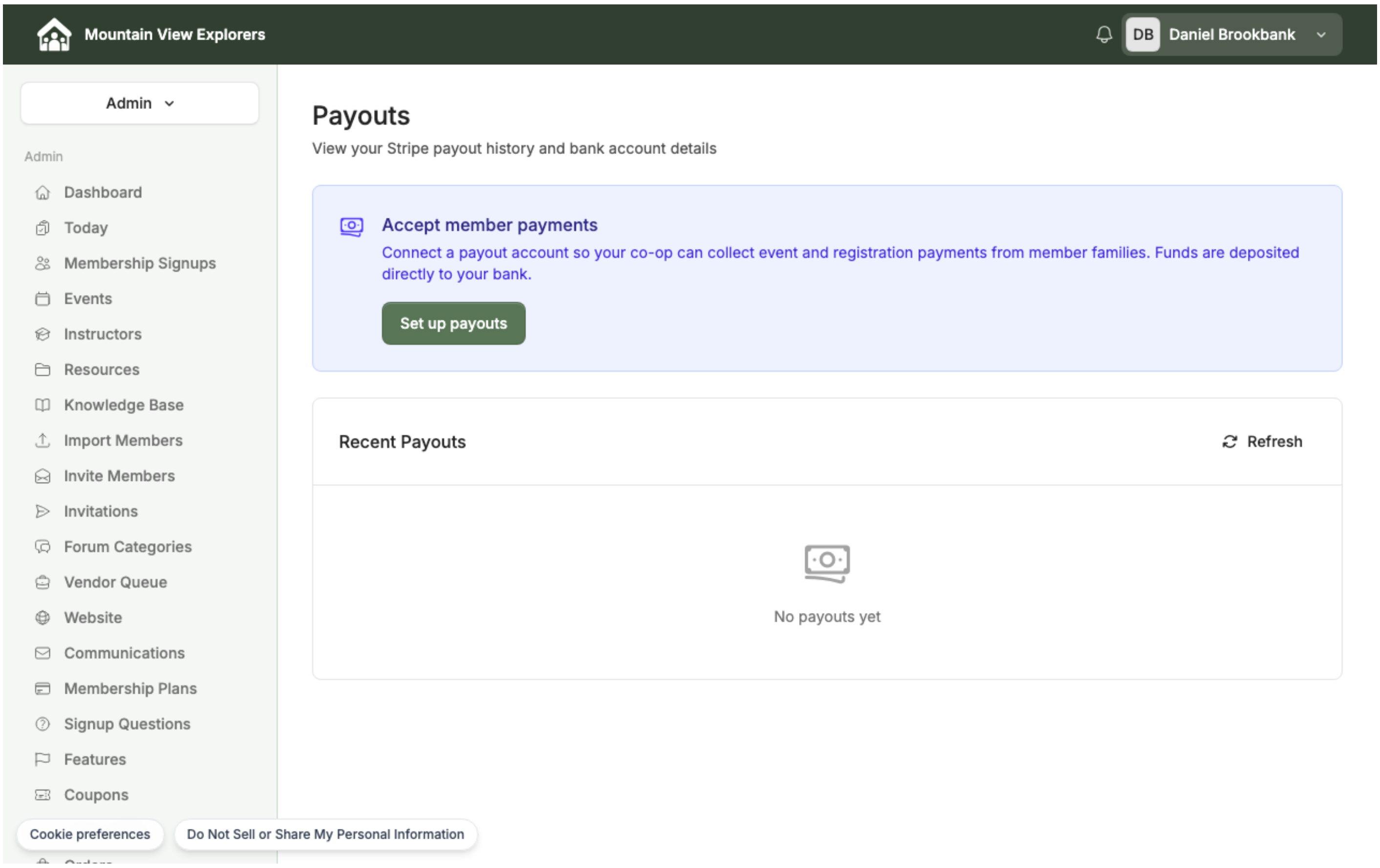
1. **The family is notified** — they receive an email prompting them to update their payment method.
2. **The order status updates** — the row shows **Past due** or **Failed** in the Orders list.
3. **Stripe retries the charge** — Stripe automatically retries failed payments on a schedule set in your Stripe dashboard.

As the admin, you can monitor failed payments by filtering the Orders list to **Failed** or **Past due** and following up directly with affected families if the payment is not resolved after retries.

Step 6: View payouts

Payouts show when funds collected from membership payments are transferred to your bank account.

1. In the left sidebar, click **Payouts**.



2. If Stripe is not yet connected, click **Set up payouts** to begin the Stripe onboarding flow.

   See [How to Set Up Membership Plans and Recurring Payments]() for a full walkthrough of the Stripe setup process.
3. Once Stripe is connected, the **Recent Payouts** section shows each transfer — the date, amount, and destination bank account.

> **Recent Payouts screenshot coming soon.** This will be added after Stripe is connected and at least one payout has been issued.

What's next

- [How to Set Up Membership Plans and Recurring Payments]() — create the plans families purchase and connect Stripe
- [How to Invite Families and Manage Your Member Directory]() — invite families and manage their membership status

How to Review and Approve Membership Signups

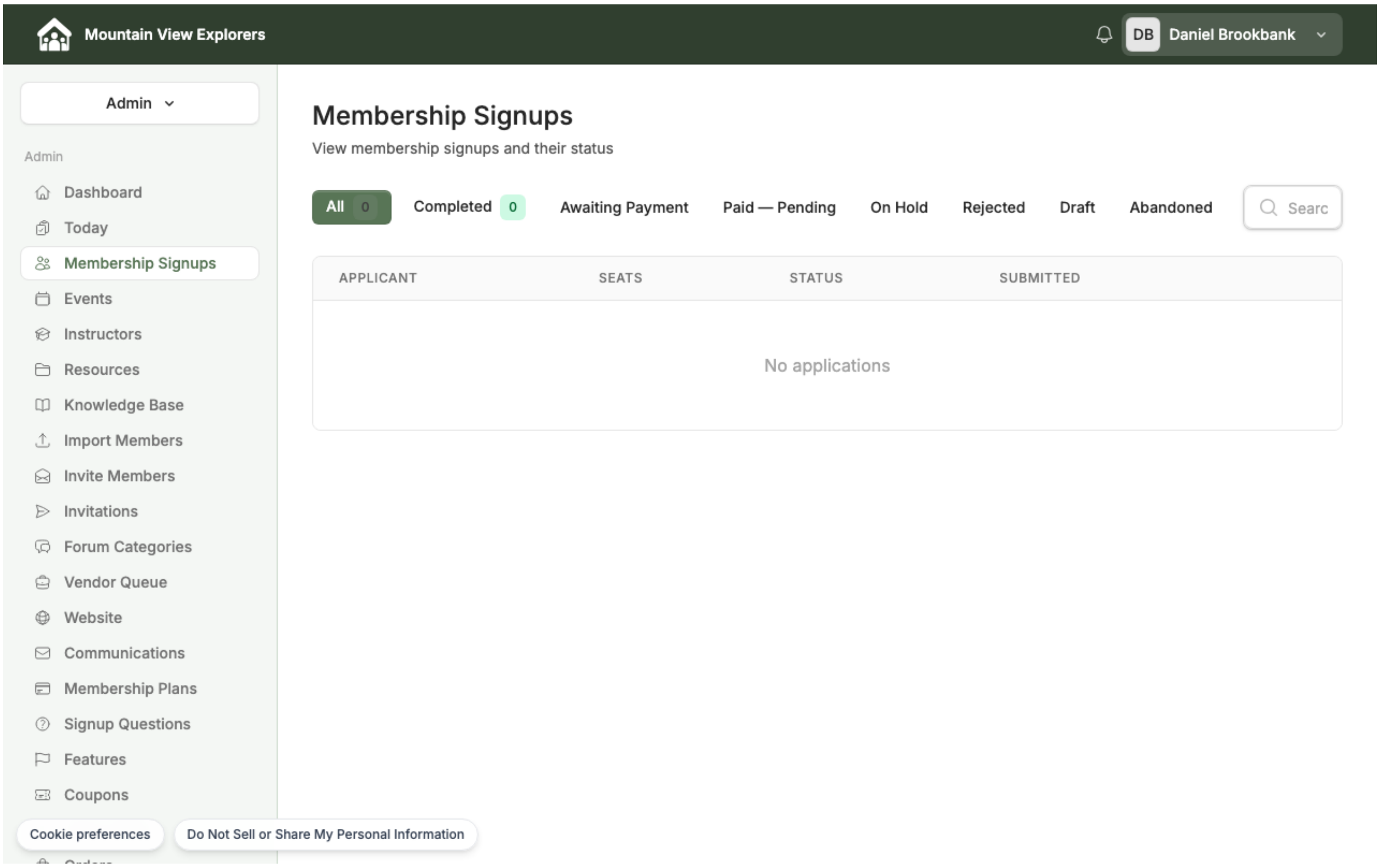
Overview

When families submit a membership application through your co-op's public website, their application lands in the **Membership Signups** queue. You review each application and approve, decline, or put it on hold.

> **Note:** The screenshots below were captured before any membership applications were submitted. Screenshots showing populated application rows and the application detail view will be added once real signups exist in the demo account.

Step 1: Open the Membership Signups queue

1. Sign in to your admin panel at `yourcoopname.cooplyhq.com`.
2. In the left sidebar, click **Membership Signups**.



The **Membership Signups** page opens and shows all applications, organized by status tab.

Step 2: Understand the application statuses

Use the status tabs at the top of the page to filter applications:

Tab	What it shows
All	Every application regardless of status
Completed	Applications that are fully approved and the family has active membership
Awaiting Payment	Approved applications waiting for the family to complete payment
Paid — Pending	Payment received; awaiting your final approval
On Hold	Applications you have paused pending more information
Rejected	Applications you have declined
Draft	Incomplete applications the family has not yet submitted

Tab	What it shows
Abandoned	Applications started but not submitted within the expiry window

Each row in the list shows:

Column	What it shows
Applicant	The primary contact name for the applying family
Seats	Number of membership seats requested
Status	Current application status
Submitted	Date the application was submitted

> **Populated application list screenshot coming soon.** This will be added once families have submitted membership applications.

Step 3: Review an application

1. Click any row in the Membership Signups list to open the application detail.

The application detail page shows:

Primary Contact

- Full name, email address, and phone number of the parent or guardian who submitted the application

Household Details

- Names and ages of household members being added as co-op members
- Total seats requested

Membership Plan

- The plan the family selected and its price

Actions panel

- Buttons to take action on the application: **Approve**, **Put On Hold**, or **Reject**

> **Application detail screenshot coming soon.** This will be added once a real application exists in the demo account.

Step 4: Approve an application

1. On the application detail page, click **Approve** in the Actions panel.
2. Confirm the approval in the dialog that appears.

What happens next:

- If the selected membership plan has a cost, the application moves to **Awaiting Payment** and the family receives an email with a link to complete checkout.
- If the plan is free, the application moves directly to **Completed** and the family receives access to your co-op.
- The family appears in your member directory once their status reaches **Completed**.

Step 5: Put an application on hold

Use **Put On Hold** when you want to pause an application without declining it — for example, if you need more information from the family or are at capacity.

1. On the application detail page, click **Put On Hold**.
2. Optionally, add a reason in the dialog.
3. Click **Confirm** to save.

The application moves to the **On Hold** tab. You can return to it at any time and approve or reject it.

Step 6: Reject an application

1. On the application detail page, click **Reject**.
2. Optionally, add a reason in the dialog. The family will not see this reason unless you choose to communicate it separately.
3. Click **Confirm** to reject.

The application moves to the **Rejected** tab. The family is notified by email that their application was not approved.

What's next

- How to Invite Families and Manage Your Member Directory — invite families directly and manage their membership status
- How to View and Manage Membership Payments — track payment orders and Stripe payouts once families have completed checkout

How to Grant Website Editor Access (Content Editor Role)

Placeholder — will update after image upload.

How to Grant Website Editor Access (Content Editor Role)

Placeholder - will update after image upload.

How to Grant Website Editor Access (Content Editor Role)

Placeholder.

How to Grant Website Editor Access (Content Editor Role)

What the Content Editor role is

The **Content Editor** role lets a member edit your co-op's public website pages — and nothing else. They cannot view your member list, access billing, or change co-op settings.

Use this role when you want a volunteer or parent to keep the website updated without handing over the keys.

Content Editors can:

- Edit and save website pages
- Preview published pages

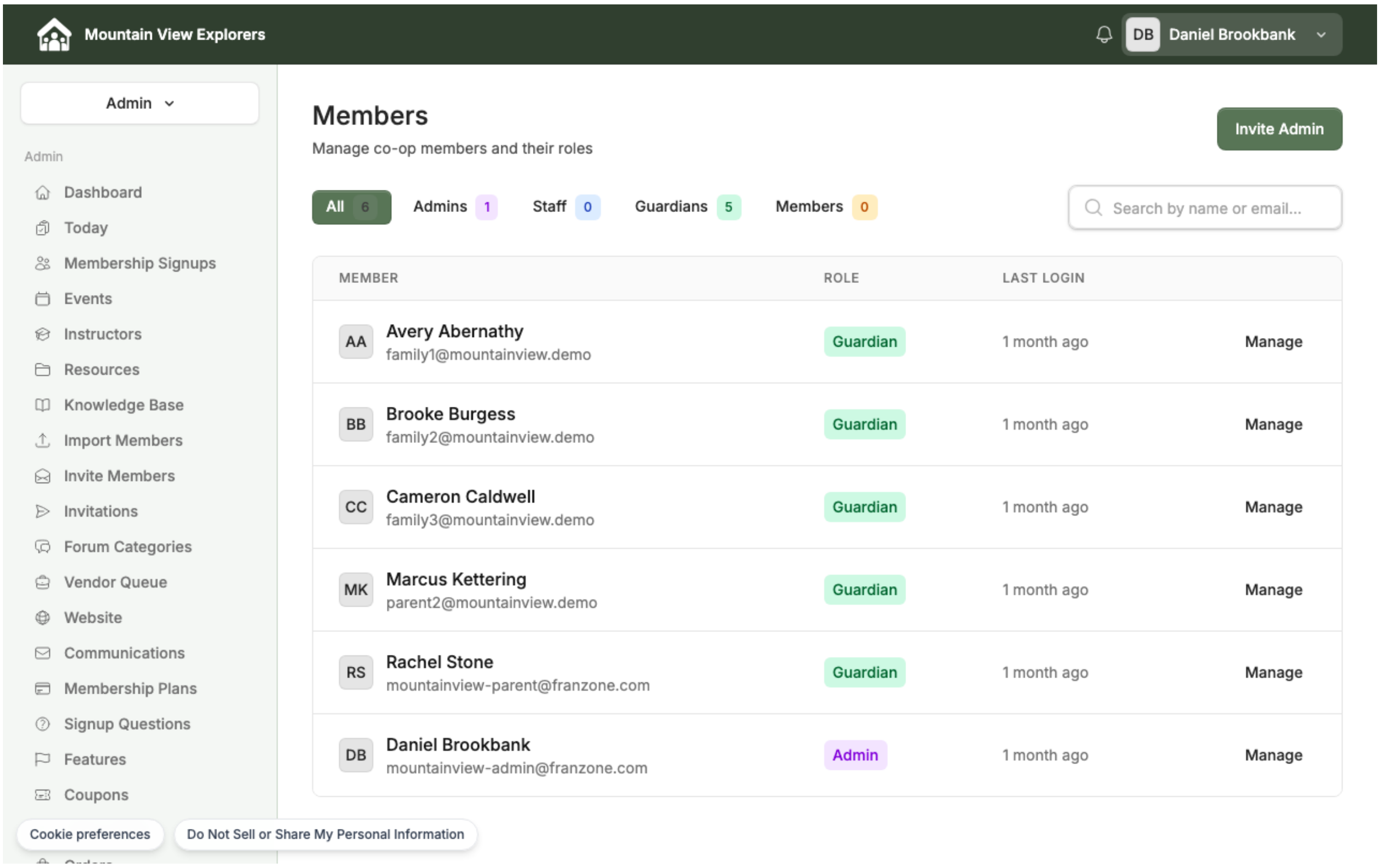
Content Editors cannot access:

- Member directory or family information
- Billing, payments, or membership plans
- Co-op settings or other admin areas

How to assign the Content Editor role

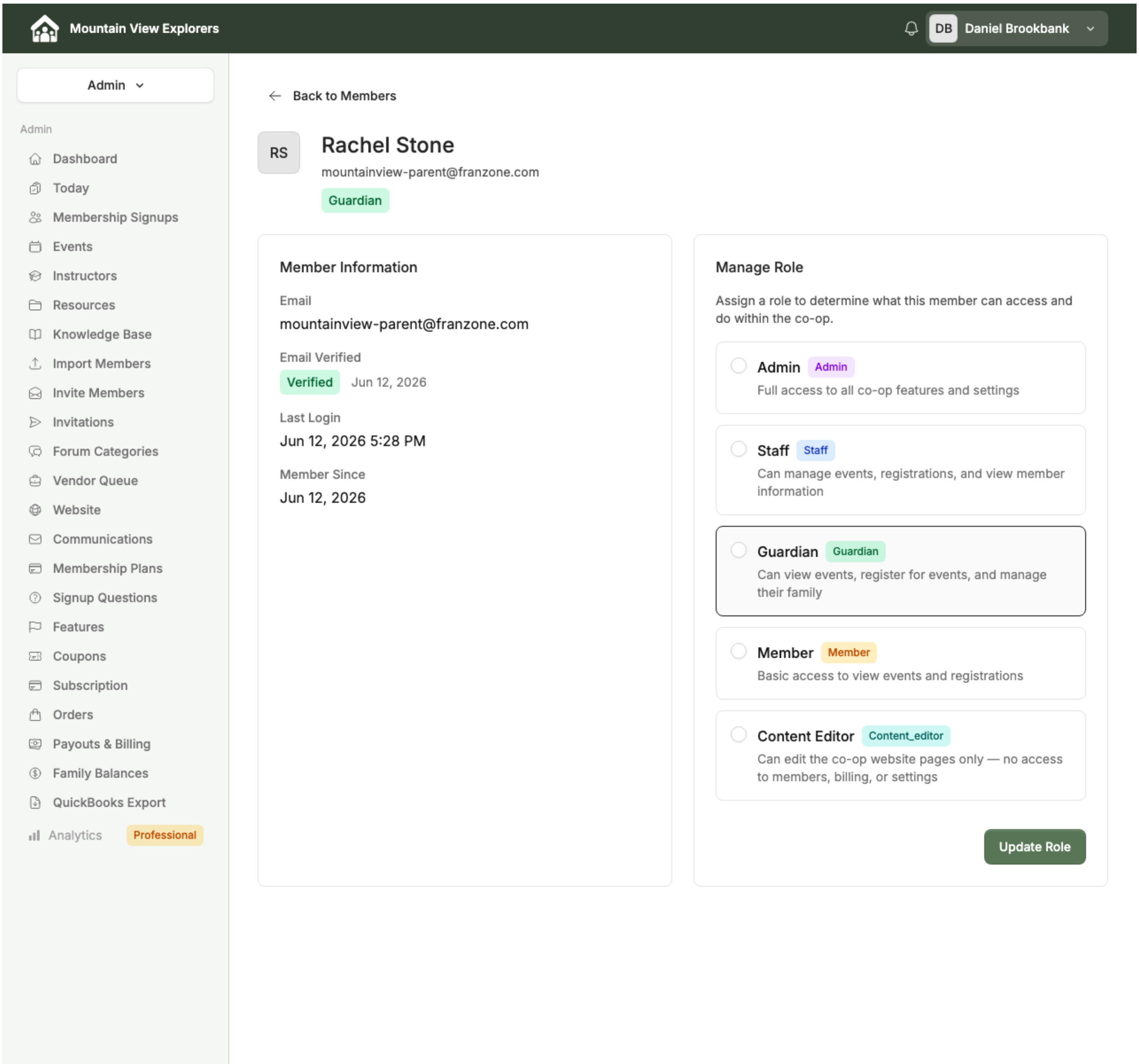
Step 1 — Go to Members

From the Admin panel, click **Members** in the left sidebar.



Step 2 — Open the member's profile

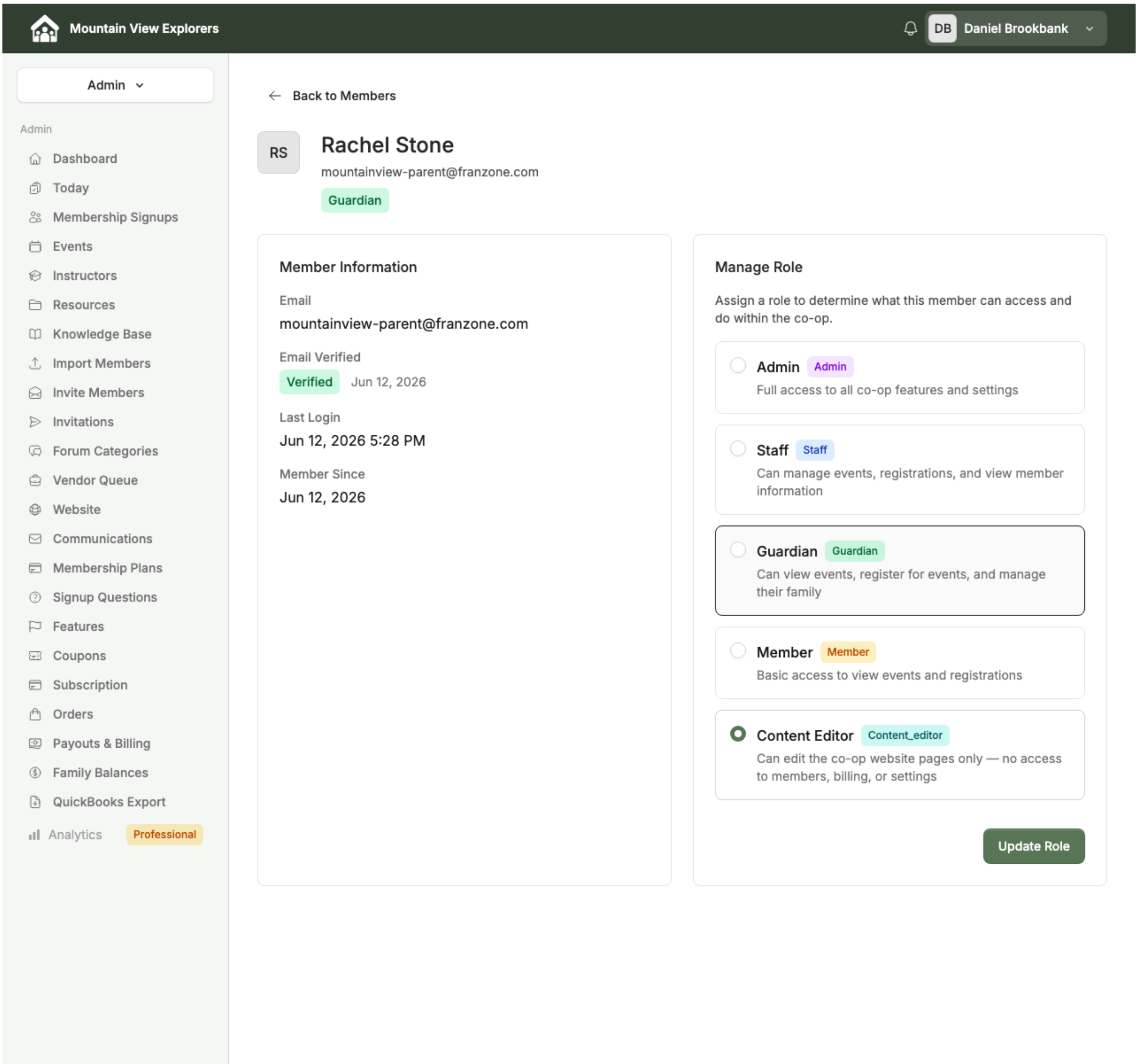
Find the person you want to give website editor access. Click **Manage** on their row.



The **Manage Role** panel lists all available roles. Each role shows what it can and cannot do.

Step 3 — Select Content Editor and save

Scroll to the bottom of the role list and select **Content Editor**.

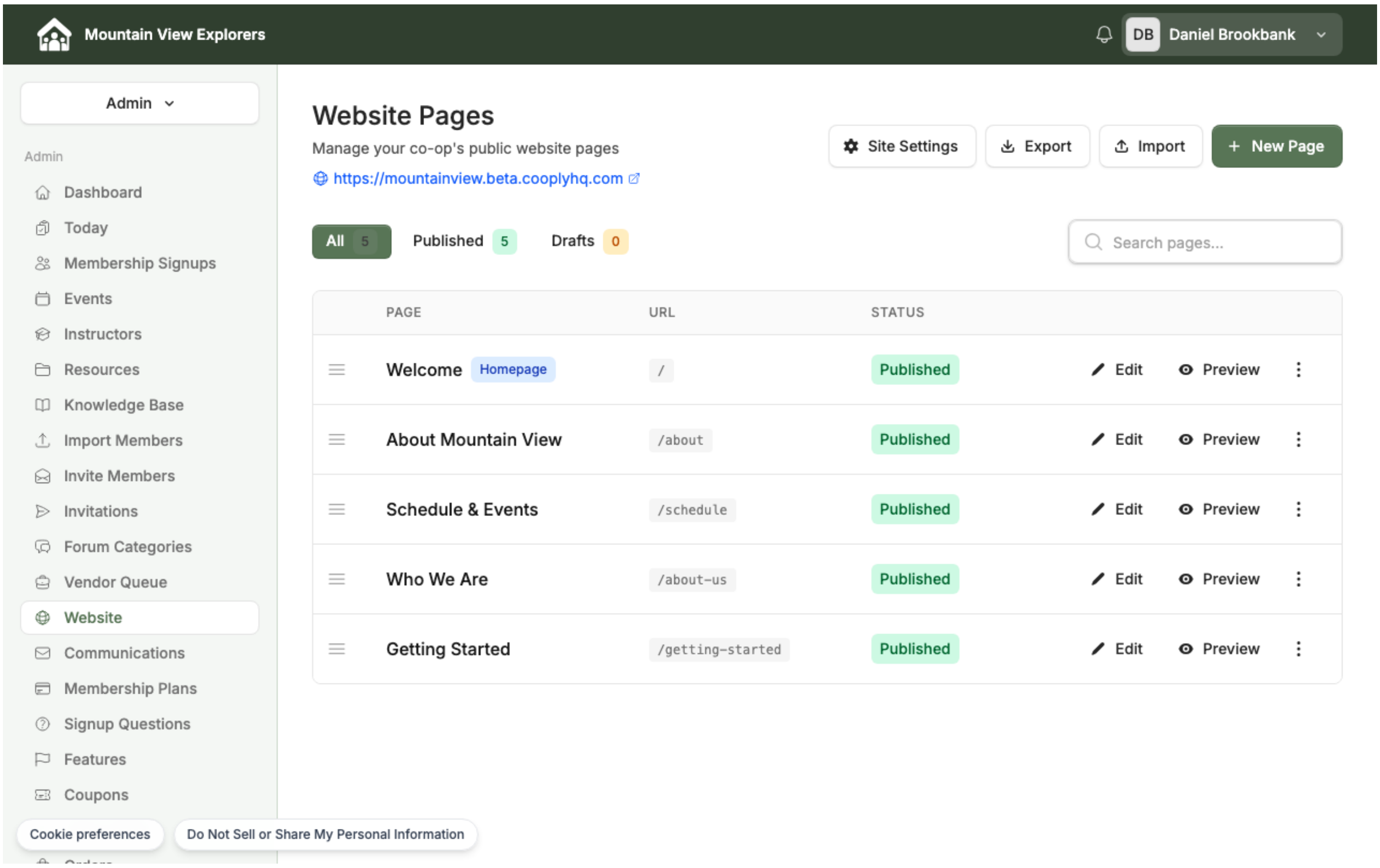


Click **Update Role**. A green confirmation banner will appear: *Role updated to content_editor successfully.*

The member can now log in and edit your co-op's website pages.

What the Content Editor sees

When a Content Editor logs in, they land on the Website Pages view. They see only the website section — no member data, events management, or billing screens are visible.



From here they can:

- Click **Edit** on any page to open the page editor
- Click **Preview** to see how a page looks on the public site
- Click **New Page** to add a new page to the website

How to revoke Content Editor access

To remove website editor access, go back to the member's profile (Members → Manage) and assign them a different role — typically **Member** for a standard co-op participant or **Guardian** if they are a family account holder.

Click **Update Role** to save the change. The member will no longer have access to the website editor the next time they log in.

What's next

- How to Configure Your Co-op Settings — manage co-op-wide preferences and branding

How to Export Co-op Finances (QuickBooks-compatible files)

What this export does

CooplyHQ lets you export your co-op's finances for your accountant in a format that can be imported into QuickBooks. The export is a .zip file containing four CSV reports:

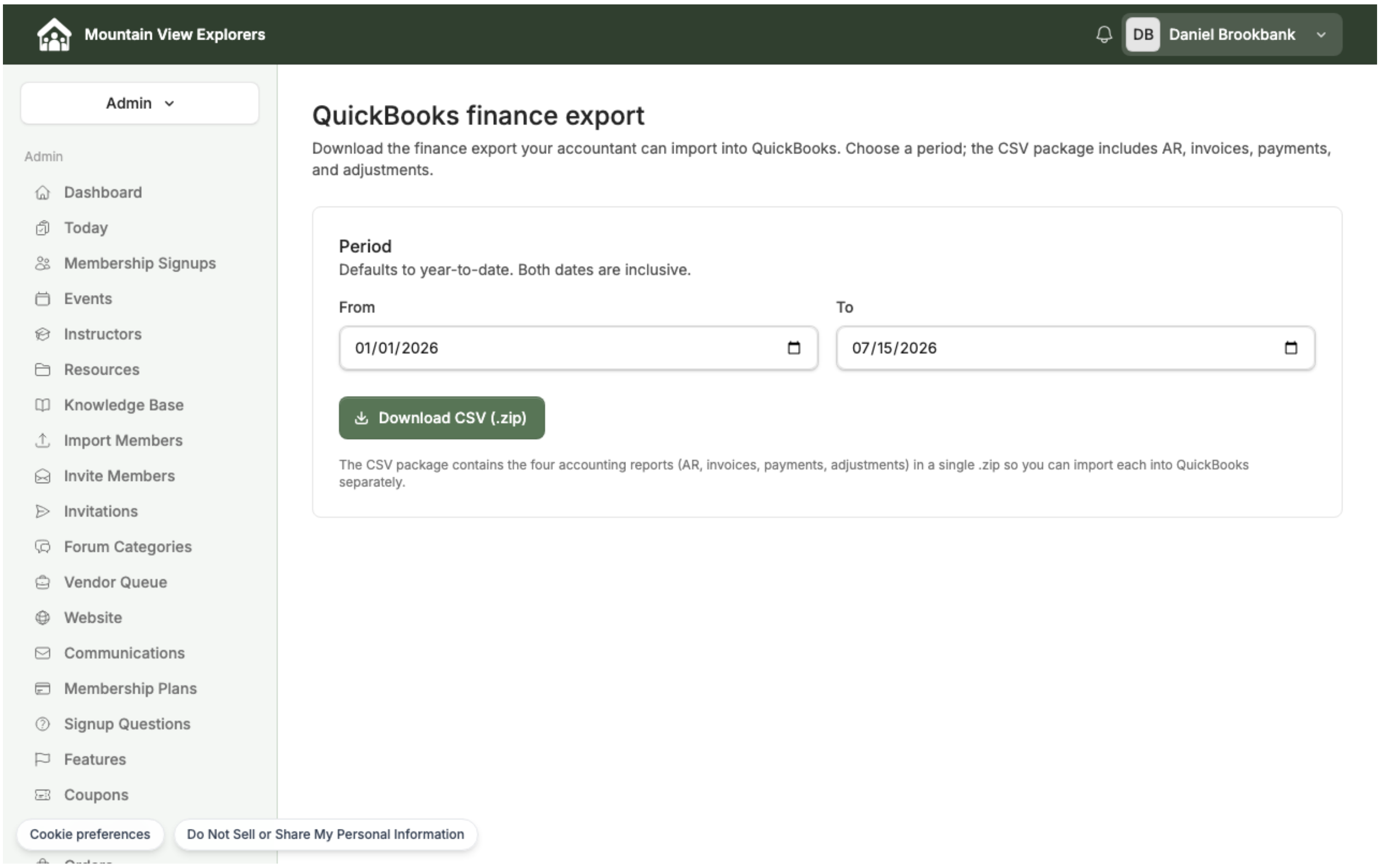
- **Accounts Receivable (AR)** — outstanding balances owed to the co-op
- **Invoices** — all invoices issued during the period
- **Payments** — payments received from families
- **Adjustments** — any manual billing adjustments

This is a file export, not a QuickBooks integration or live sync. Your accountant imports the files manually into QuickBooks.

How to export your finances

Step 1 — Open QuickBooks Export

In the Admin panel, scroll down the left sidebar and click **QuickBooks Export**.



Step 2 — Set the date range

The export defaults to **year-to-date** (January 1 through today). Adjust the **From** and **To** dates if you need a different period. Both dates are inclusive.

Step 3 — Download the CSV package

Click **Download CSV (.zip)**.

Your browser downloads a .zip file containing the four CSV reports. Send the .zip to your accountant — they can import each file into QuickBooks separately.

QuickBooks Desktop IIF export (optional)

If your co-op uses QuickBooks Desktop and needs an IIF file instead of CSV, this is available as an opt-in add-on. The IIF export button does not appear by default.

To enable it, contact CooplyHQ support. Once enabled, an **Export IIF (QuickBooks Desktop)** button will appear alongside the CSV button on the same page.

What's next

- How to View and Manage Membership Payments — track individual family balances and payment history

How Members Control Their Directory Privacy Settings

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title: "How Members Control Their Directory Privacy Settings" bookstack_book: "Getting Started" description: "Choose which details your family shares in the member directory — hide or show your email, phone, address, and more, one field at a time."

What the family directory shows

The member directory lets co-op families connect with one another. Each family card can display:

- **Household name** — always shown, cannot be hidden
- Email address
- Phone number
- Home address
- Bio

- Profile photo
- Children info (number of children)
- Teaching skills and interests

You control which of these details appear on your family card. Your co-op administrator always sees your full information regardless of your privacy settings — privacy controls apply to other co-op members only.

How to open your privacy settings

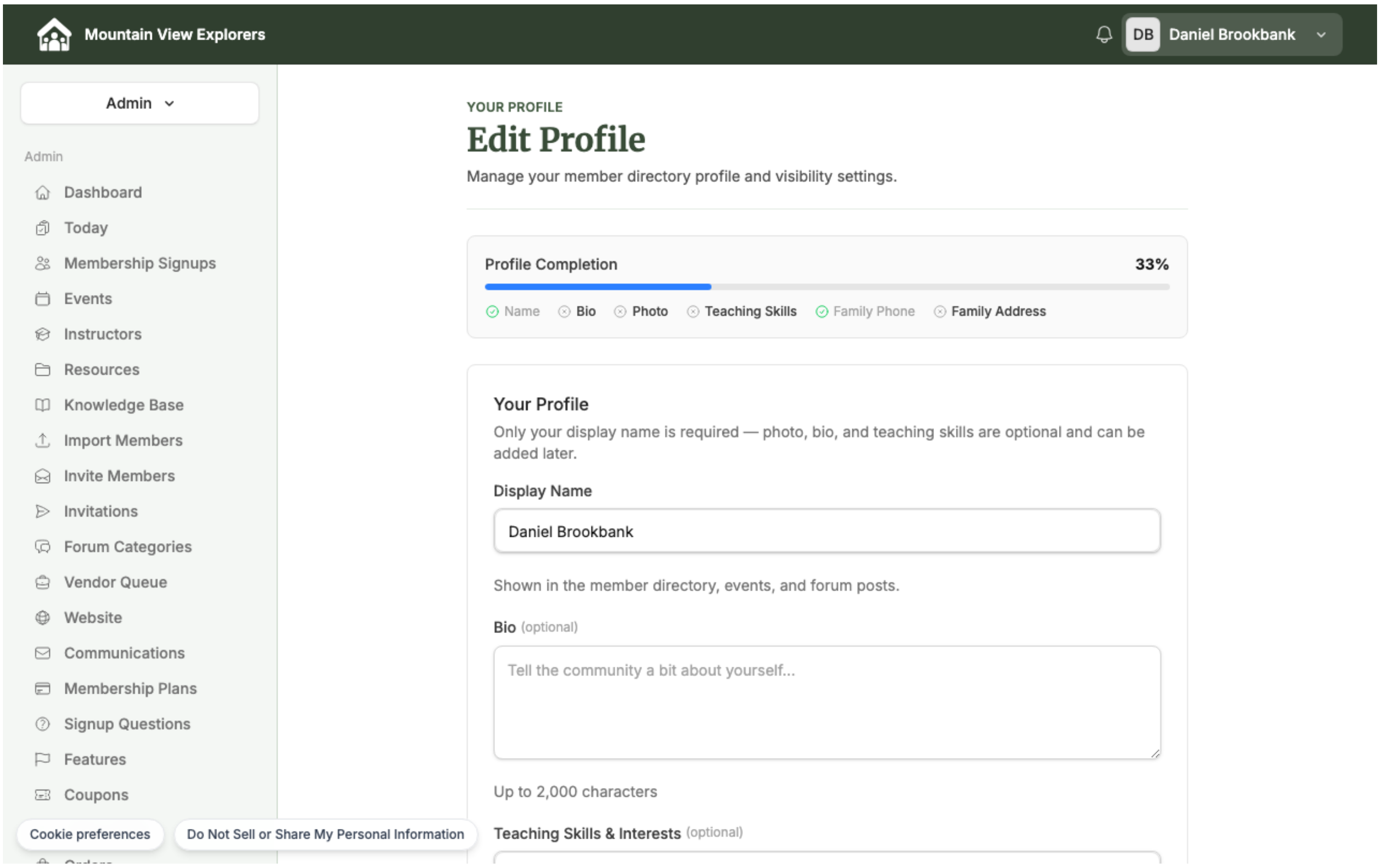
Step 1 — Log in and go to My Profile

Log in to your co-op portal. In the left sidebar, click **My Profile**.

This opens the **Edit Profile** page where you manage both your personal profile and your directory visibility.

Step 2 — Scroll to Directory Visibility

Scroll down past the profile fields (name, bio, photo, teaching skills). The **Directory Visibility** section appears near the bottom of the page.



> **Note:** Only the family's guardian account can change directory settings. If you don't see the Directory Visibility section, contact the guardian on your family account.

How to control what other members see

Show or hide your family entirely

The **Show in Directory** toggle at the top of the section controls whether your family appears in the directory at all.

- **On** (default) — your family card is visible to other members
- **Off** — your family does not appear in the directory

Turning off Show in Directory hides your entire entry. Other members will not see your family card.

Show or hide individual fields

When **Show in Directory** is on, a second panel shows individual field toggles. Turn each one on or off to control what other members see on your family card:

Field	Default
Email address	Shown
Phone number	Shown
Home address	**Hidden**
Bio	Shown
Profile photo	Shown
Children info	Shown
Teaching skills	Shown

Toggle any field off to hide it from other members. Your household name is always shown and cannot be hidden.

Shortcut buttons:

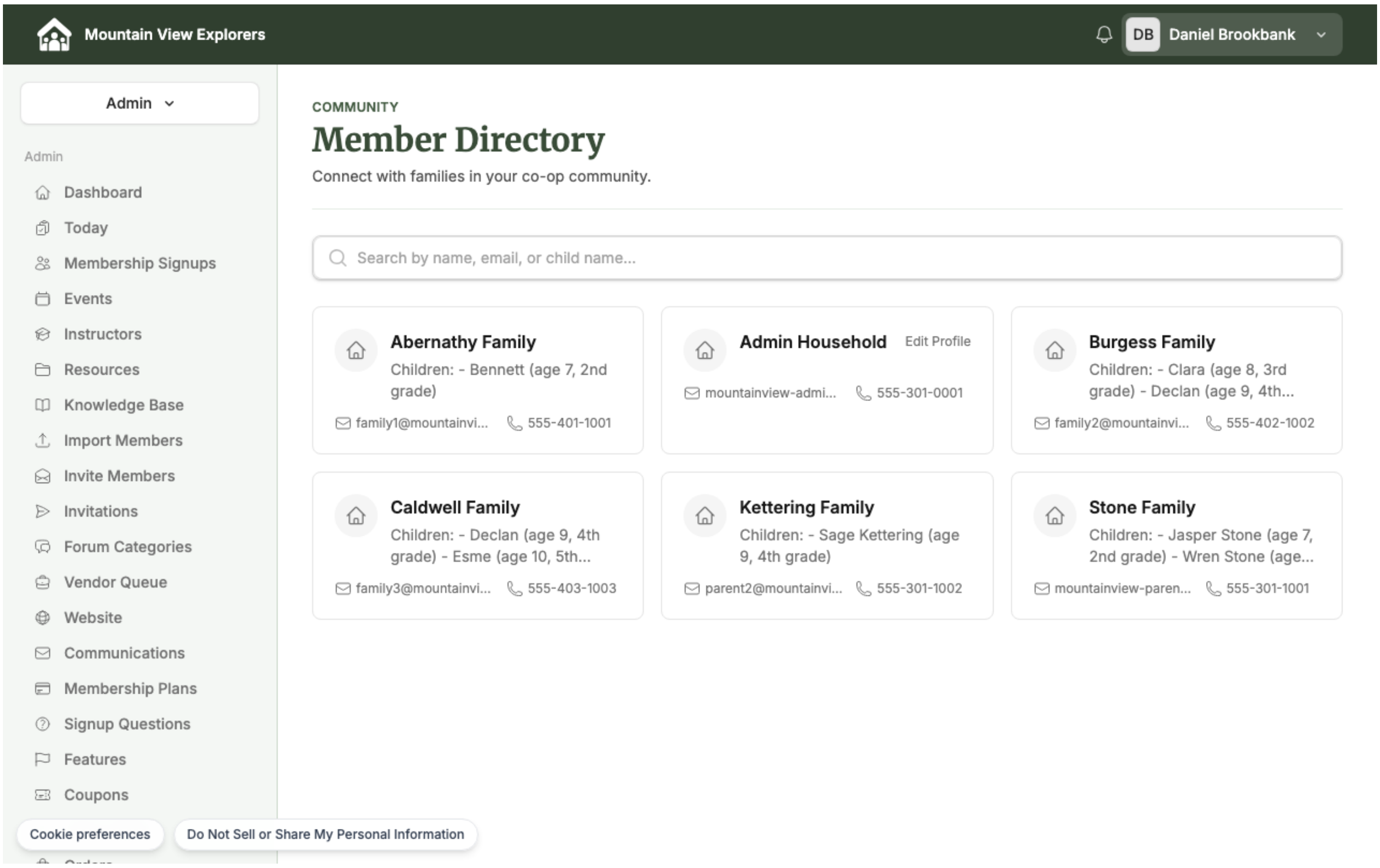
- **Show All** — turns on all optional fields at once
- **Hide All** — turns off all optional fields at once

Step 3 — Save your settings

Click **Save Settings** to apply your changes. A green "Saved!" confirmation appears briefly when your settings have been recorded.

What the directory looks like to other members

Other members see only the fields you have enabled. Fields you have hidden are simply absent from your card — there is no indication to others that you hid them.



Co-op admins and staff always see your full information. Privacy settings do not restrict what admins can view.

How to confirm your changes took effect

After saving, visit the directory to see your card as other members see it:

1. In the left sidebar, click **Directory** (under the Community section).
2. Find your family's card.
3. Verify that only the fields you enabled are displayed.

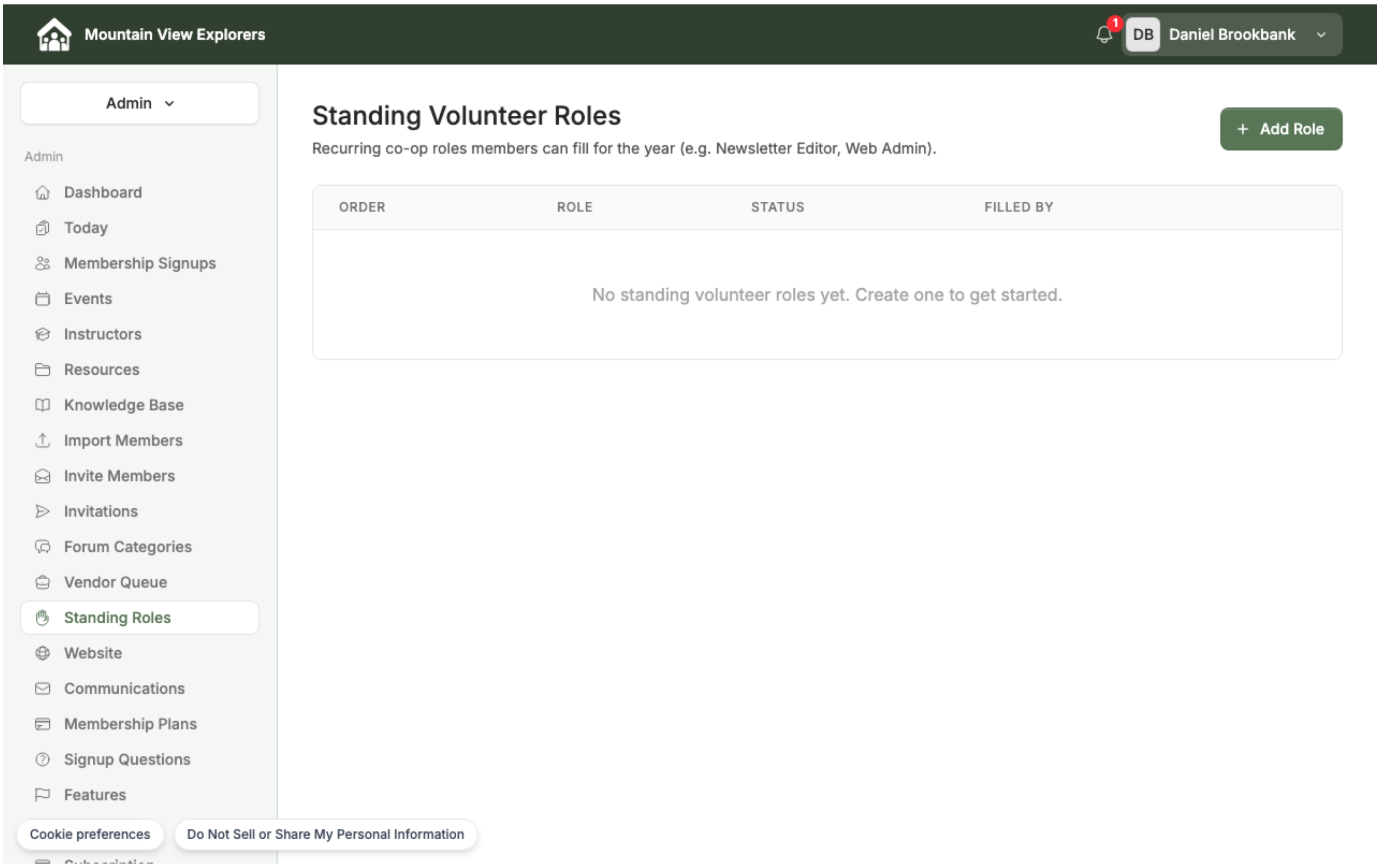
If a field you turned off still appears, try refreshing the page and checking your settings again.

What's next

- [How to Invite Families and Manage Your Member Directory](#) — admin guide for the family directory

How to Manage Standing Volunteer Roles

Standing Volunteer Roles are recurring, year-long positions — like Treasurer, Newsletter Editor, or Field Trip Coordinator — that your co-op needs filled every year. Unlike one-off volunteer slots tied to a specific event, standing roles represent the ongoing structure of your co-op. Admins define the roles; members claim them from their dashboard.



Create a Standing Role

Only co-op admins can define standing roles.

1. In the admin portal, go to **Community → Volunteer Roles**.
2. Click **Add Role** in the top-right corner.
3. Fill in the role details:
   - **Name** — the role title members will see (e.g., *Field Trip Coordinator*)

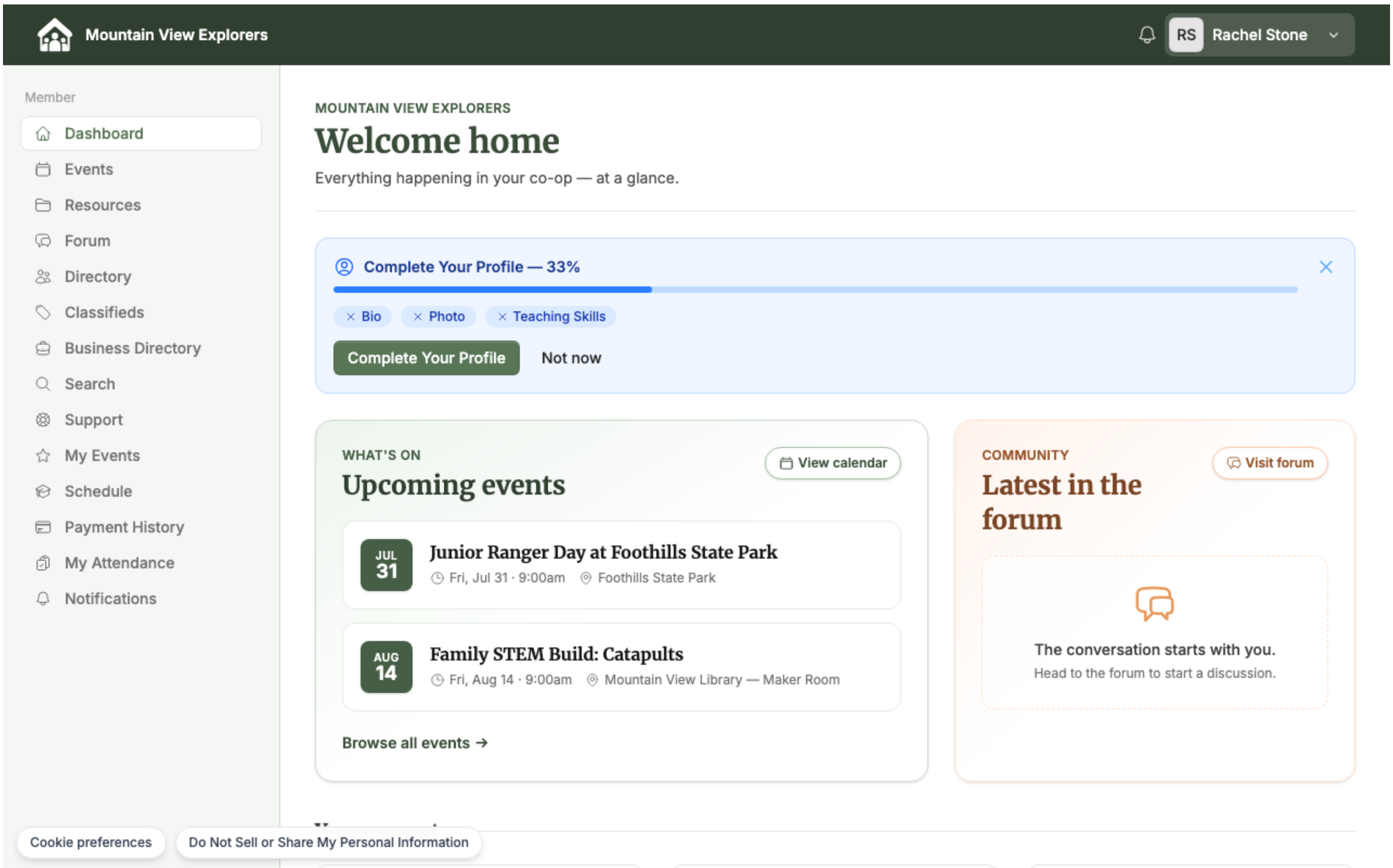
  - **Description** — optional; a short summary of what the role involves
  - **Display Order** — lower numbers appear first in the member list
  - **Active** — leave checked to make the role visible and claimable by members
4. Click **Create Role**.

The role appears in the table immediately. Its status shows **Vacant** until a member claims it.

To edit a role later, click **Edit** in the row. To remove a role permanently, click **Delete** — note that filled roles cannot be deleted until released.

How Members Claim a Role

Members see the Standing Volunteer Roles card on their dashboard.



1. From the member portal, go to the **Dashboard**.
2. Find the **Standing Volunteer Roles** card.
3. Browse the list of vacant roles. Each role shows its name and description.
4. Click **Claim** next to the role you want to take on.

The card updates immediately to confirm the role and show the member as the current holder. A member can only hold one standing role at a time. If all roles are filled, the card says so and shows the option to suggest a new one.

To step down from a role, the member clicks **Give up this role** on their dashboard. The role returns to vacant and becomes available for another member to claim.

Suggest a New Role

If a member wants to volunteer in a way that isn't listed, they can suggest a new role:

1. From the **Standing Volunteer Roles** card on the dashboard, scroll to the **Suggest another role** field at the bottom.
2. Type a short description of the role (e.g., *Carpool coordinator*).
3. Click **Suggest**.

CooplyHQ records the suggestion. To act on it, create the role manually in the admin portal using the steps above.

Release a Role at Year-End

At the start of a new co-op year — or any time a member steps down and you need to reassign a role — release it from the admin portal:

1. Go to **Community → Volunteer Roles**.
2. Find the filled role in the table. The **Filled By** column shows the current holder.
3. Click **Release** next to their name.
4. Confirm when prompted.

The role status changes back to **Vacant**. Members can now claim it again from their dashboards.

To reset all roles at the start of a new year, release each filled role one at a time.

What's next

- Review your co-op membership roster: **How to Invite Families and Manage Your Member Directory**
- Set up recurring membership dues: **How to Set Up Membership Plans and Recurring Payments**