Board Docket

Board Docket — Management Manual

This book is for **property management** staff and for the **Board Administrator** (whoever the board designates to run the association's account). It is how you open matters, talk on the record, send items to a noticed meeting, and keep the association's files. Board Administrator is not the same as President.

It is **not** a vote. Binding board decisions happen at a noticed meeting. In the app, post-meeting labels are **Adopted** and **Not adopted**.

Directors use the Directors Manual. Members use the Members Manual. Association counsel uses the Counsel Manual.

> Screenshots in this book are from a sample association. Your live account shows your association's name and items.

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1. What this is

Board Docket is Florida HOA board correspondence software. It keeps one association-owned record per matter so directors may communicate electronically, prepare a consent agenda, and record Adopted or Not adopted only after a noticed meeting. It is not an electronic vote, not legal advice, and not HOA management software.

Board Docket sits beside your management software (Vantaca, AppFolio, and the rest). It does not sync work orders or assessments. One job: board business should not live in reply-all email.

Each matter is a **docket item**. You create it, attach files, **Distribute to the board**, and keep one conversation on that item.

The **association** owns every record and the Stripe subscription. If the firm changes, history and billing stay with the HOA. Ending an engagement immediately ends management access; it does not delete records.

The header is white. A **sky** line on the bottom of the bar means management. A **sage** line means board (including Board Administrator). Under the bar: **name · title · Signed in {date time}**, frozen at login until Sign out.

Ask in the header answers product questions from these manuals and the FAQ. It cannot see this association's Queue. It is not legal advice and not a vote. **Search** finds items you can already open.

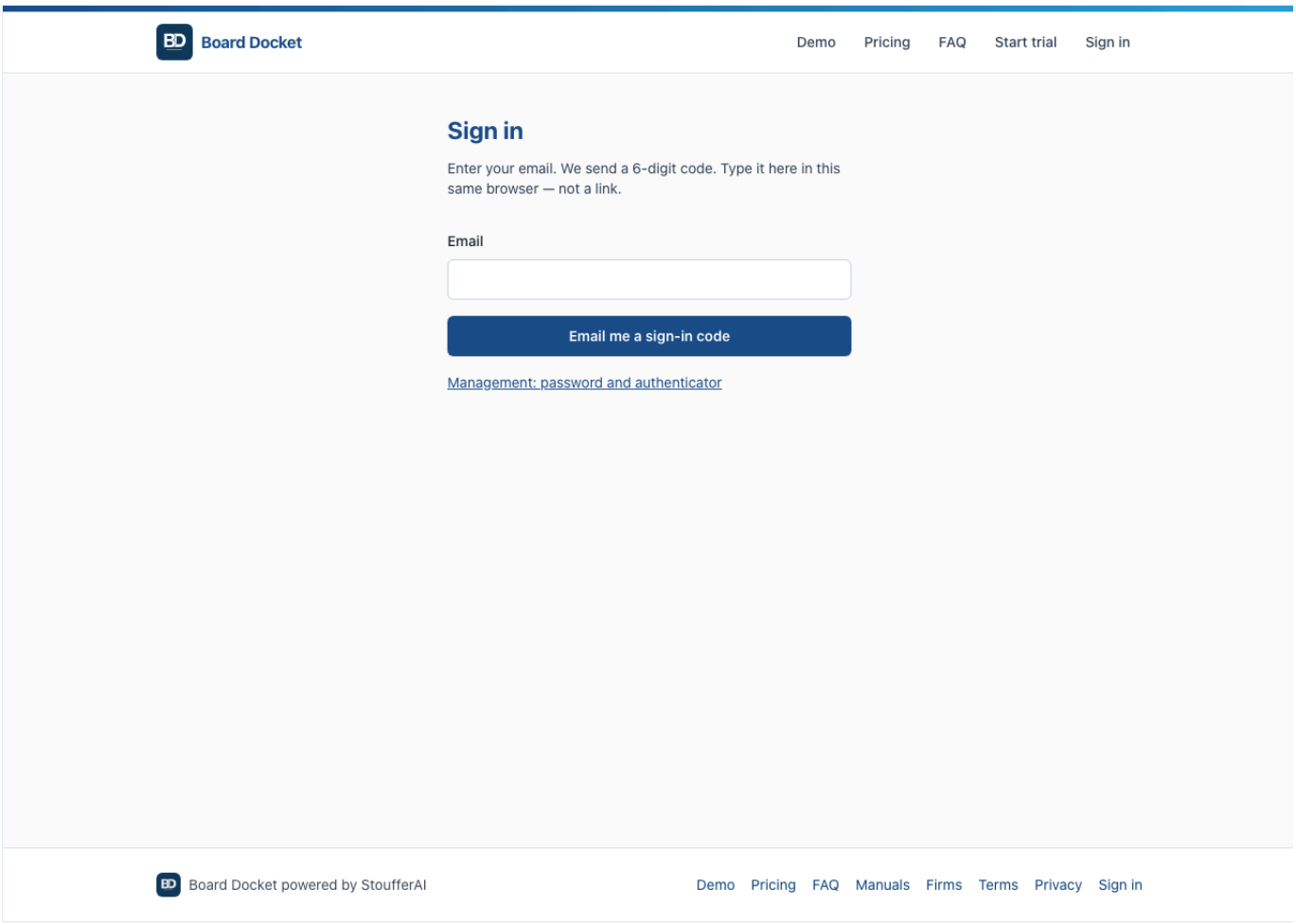
Who	Home	What they can do
Management	**Queue**	Create live items, reply as management, meetings, packets, management-only items
Board Administrator	**Queue**	Same tools as management for most board work, **plus** director signals, seats, members, counsel, branding, engagement, billing, backup

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2. Sign in

1. Open the Board Docket address.
2. Enter the work email you already read.
3. Type the **6-digit code** in the **same browser**. Codes expire and work once. If a code expires, request another.
4. If you work on more than one association, pick the correct one.

The code is sent to that mailbox. You do not change the association’s mail host. The Cedar Ridge sample addresses are not mailboxes, so that sample shows the code on the sign-in page. Mail from outside the association goes to the address shown in **Mail**.



Optional: **More → Password and authenticator** to add a password plus an authenticator app. Sign-in then asks for the password and a 6-digit app code. The emailed code still works. Directors stay on the email code.

Optional: **More → Texts** for SMS notices. Sign-in is never by text.

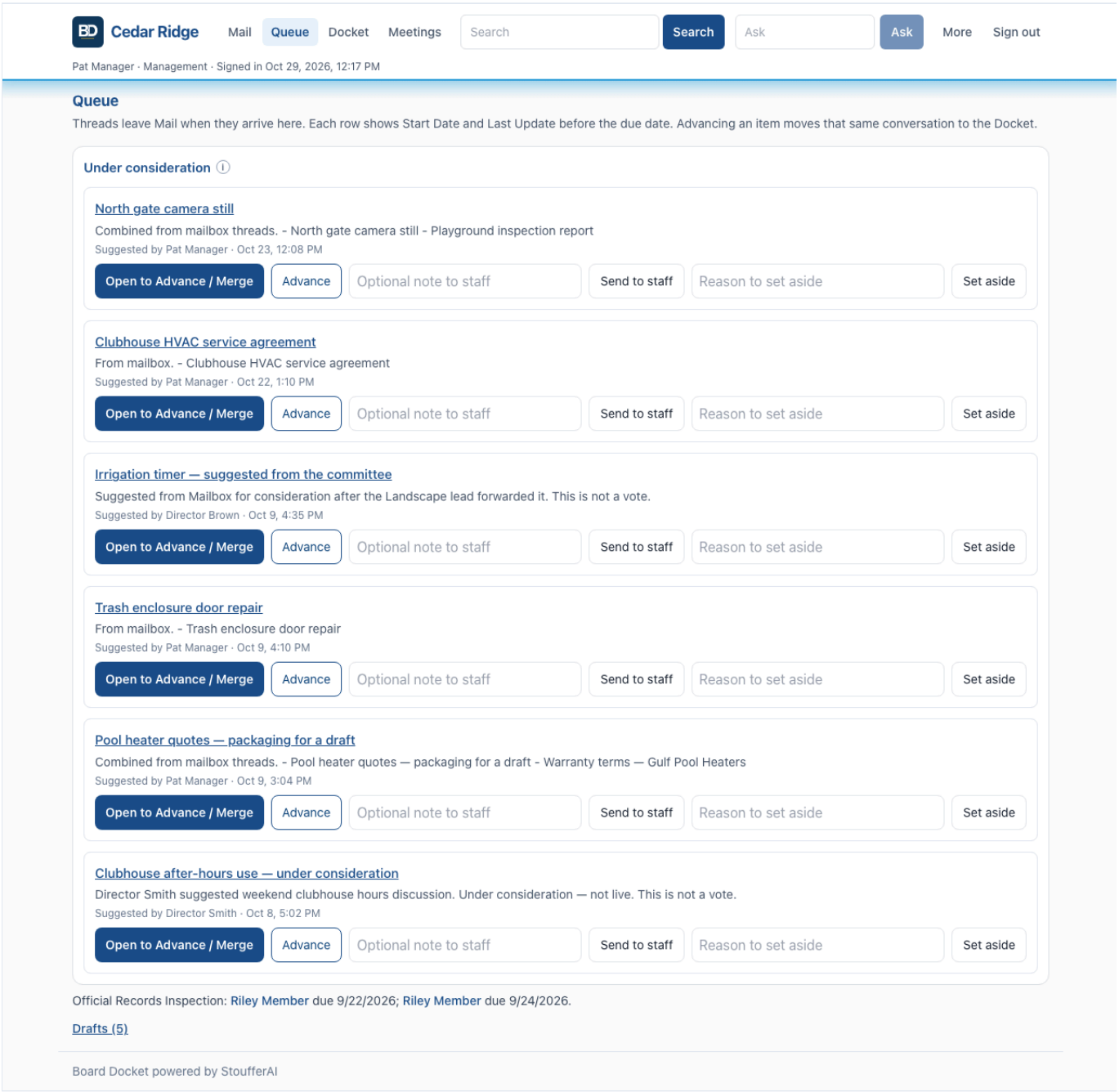
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3. Queue

Sign-in opens **Queue**. **Mail** is highlighted while you are in Mail. **Queue** lists items **under consideration**, plus a **Drafts** link. A mail thread leaves **Mail** when it arrives here. Opening a Queue item stays on Queue — the email messages and attachments come with the topic so you can talk with directors and outside parties under one record. On the Queue there is no Cc. Each director sees only their own comments and management's replies. Other directors do not. Management and the Board Administrator see every director's comments. **Advance to Docket** moves that same item onto the Docket and off the Queue. Every comment made on the Queue is then visible to every director who can open the item, and to management and the Board Administrator. There is still no Cc. Live and closed items are on **Docket**, not in this list.

Each row on **Queue** and **Docket** shows **Start Date** and **Last Update** between the item and the due date. Start Date is when the item was created. Last Update is the last time that item changed. Dates are month and day, the same style as Due. On a phone those two columns stay hidden so the title still fits.

An open Official Records Inspection is called out above the list when one is waiting.



Mail, **Queue**, **Docket**, and **Meetings** are the primary tabs. **Docket** is the live and closed list, with filters (status, category, amount, dates, text). **Meetings** is the meeting list; use **Calendar** for the monthly view. There is no **New** tab. **Search** in the header finds items you can open. On the phone those four are the bottom bar (Mail inbox, Queue home, Docket document, Meetings calendar). The lit

tab stays lit inside a thread or an item you opened from that list. The top-right menu is Search, New, Records, Texts, Manual, and Sign out.

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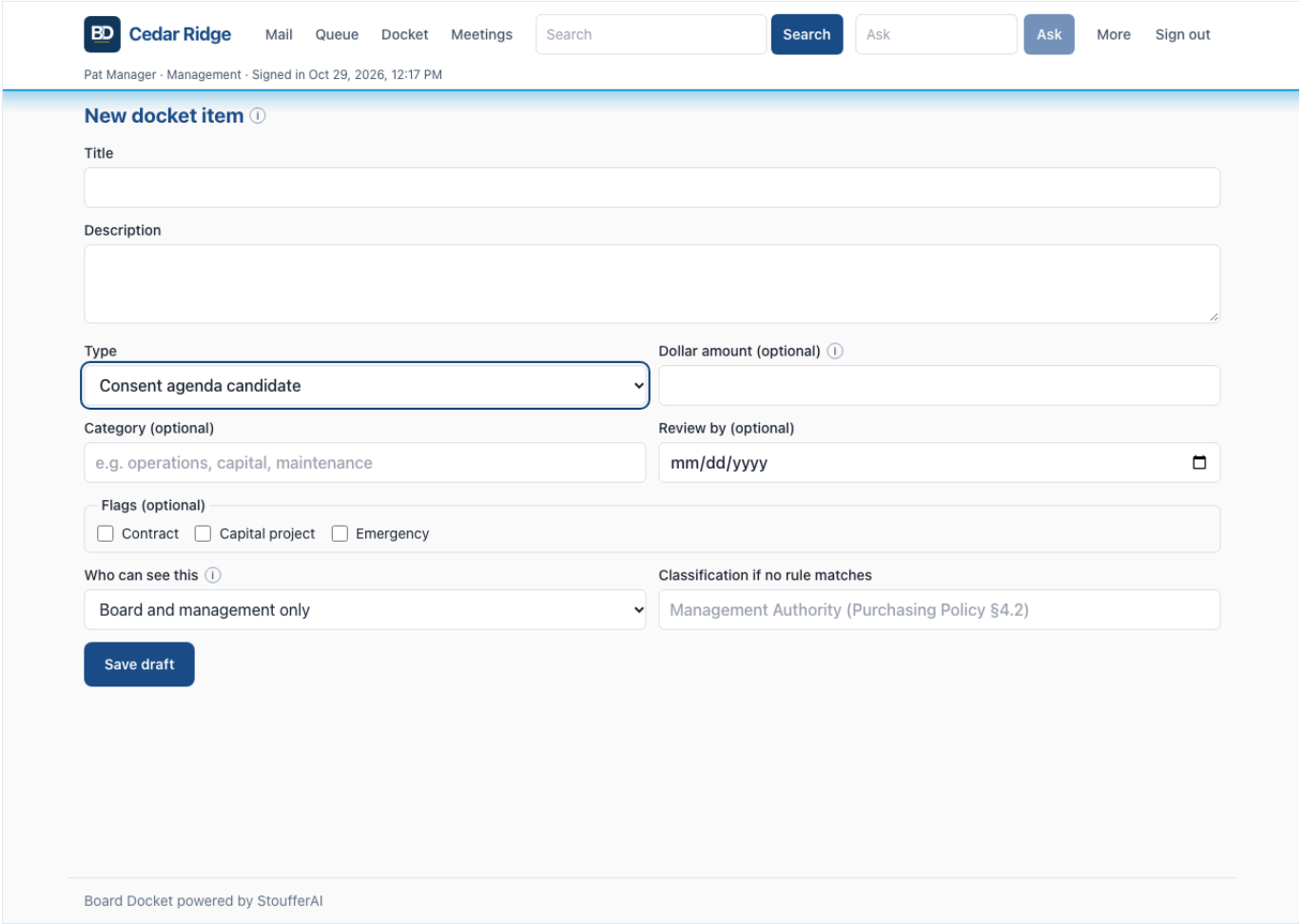
4. Create, submit, distribute

A board matter starts in **Mail**, not from a New tab.

1. **Suggest for consideration** on one thread, or **Send to Queue** for one email or several that are the same matter. Name the Queue item either way. The email subjects stay in the description. Each message and its attachments move onto the Queue item. On the Queue there is no Cc. Each director still sees only their own comments and your replies. Other directors do not see those comments. Management and the Board Administrator see every director's comments. When you Advance, every comment made on the Queue is then visible to every director who can open the item.
2. The thread leaves Mail. The item is on the Queue — open it there to continue the conversation.
3. **Forward into Docket** is the staff path that creates a **draft** (Queue → Drafts) instead of a Queue conversation. Directors do not use that folder.

On a draft, correspondence is the usual type (talk only; may never go to a meeting). Set title, description, optional dollar amount, category, and contract / capital / emergency flags. If a **published governance rule** matches the amount, type and source citation fill in — that can **override** the Type you picked. Set **Who can see this** (see §6). **Save draft**.

Save draft does not put the item on a meeting. The board does not see it until you **Submit** and **Distribute**. Type is what you will ask of the board later, not a roster placement.



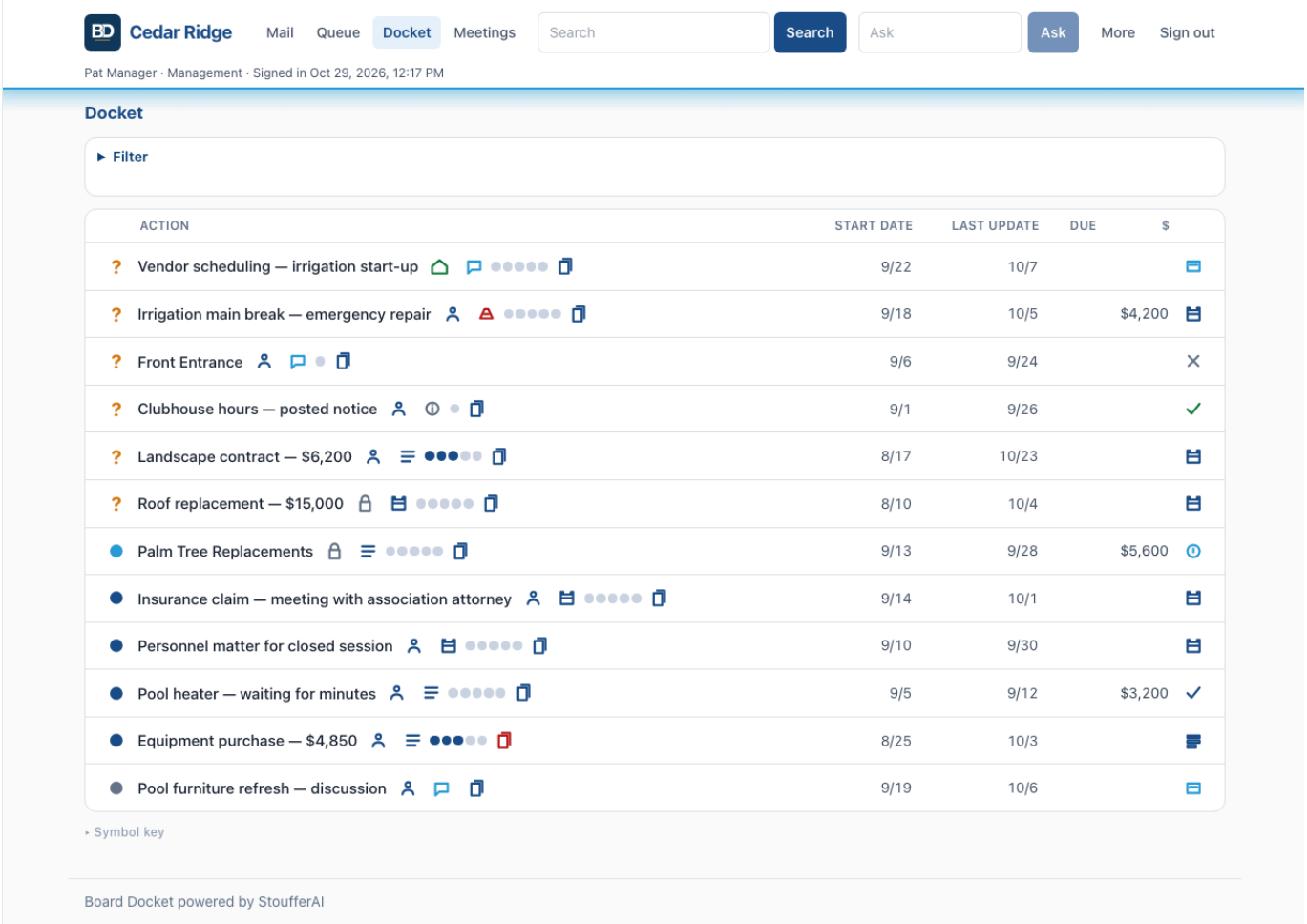
On the draft:

1. **Upload** PDFs, Office files, or images.
2. **Delete draft** — removes the unpublished item. Directors, management, and the Board Administrator can do this. It is not yet on the board record. After **Submit**, Delete draft is gone — use **Cancel** so the submitted item stays on the trail.
3. **Submit** — locks the draft for internal check.
4. **Distribute to the board** — sends to eligible directors and starts the clock.

After distribute (and while the item is open), under **Related documents** check each supporting file or meeting recap that members may review **before the meeting**, then **Save member materials**. That does **not** share the board conversation. Review or **Remove** those releases under **Member materials** on the meeting agenda. Closed-session items cannot release materials to members. Official minutes are not part of this picker.

You cannot distribute while the association is still **provisional** (waiting for the Board Administrator to take ownership), or after trial if the subscription is unpaid. Directors can still open existing items when unpaid.

After distribute you may still upload files until the item is completed, cancelled, or archived.



5. Item types

Type does **not** schedule a meeting by itself. Only two types auto-place after **Distribute**.

Type	After Distribute	Auto on a meeting?	Typical use
Correspondence	Talk on the record. Close as correspondence when done.	No	Email replacement
Information only	Directors may click I've Reviewed This (optional).	No	FYI
Acknowledgment	Directors click I've Reviewed This.	No	Under management spending authority

Type	After Distribute	Auto on a meeting?	Typical use
Board input	Non-binding support / do not support, or Request Board Discussion.	No	Feedback before a meeting
Consent agenda candidate	Ready for Consent Agenda or Request Board Discussion. Ready is **not** a vote. Silence is never Ready.	Only after enough Ready signals → **consent agenda**	Purchases that need a meeting decision
Board meeting required	Needs a noticed meeting.	**Yes — regular agenda**	Capital / high dollar
Acted under emergency authority	Record of action already taken; ratification at a meeting.	**Yes — regular agenda**	Emergency

Consent agenda is the meeting list of routine items that already hit Ready. At the noticed meeting they may be **adopted in one motion** if they stay on consent. That motion is the decision. Clicking Ready in the app only means a director is prepared for that list.

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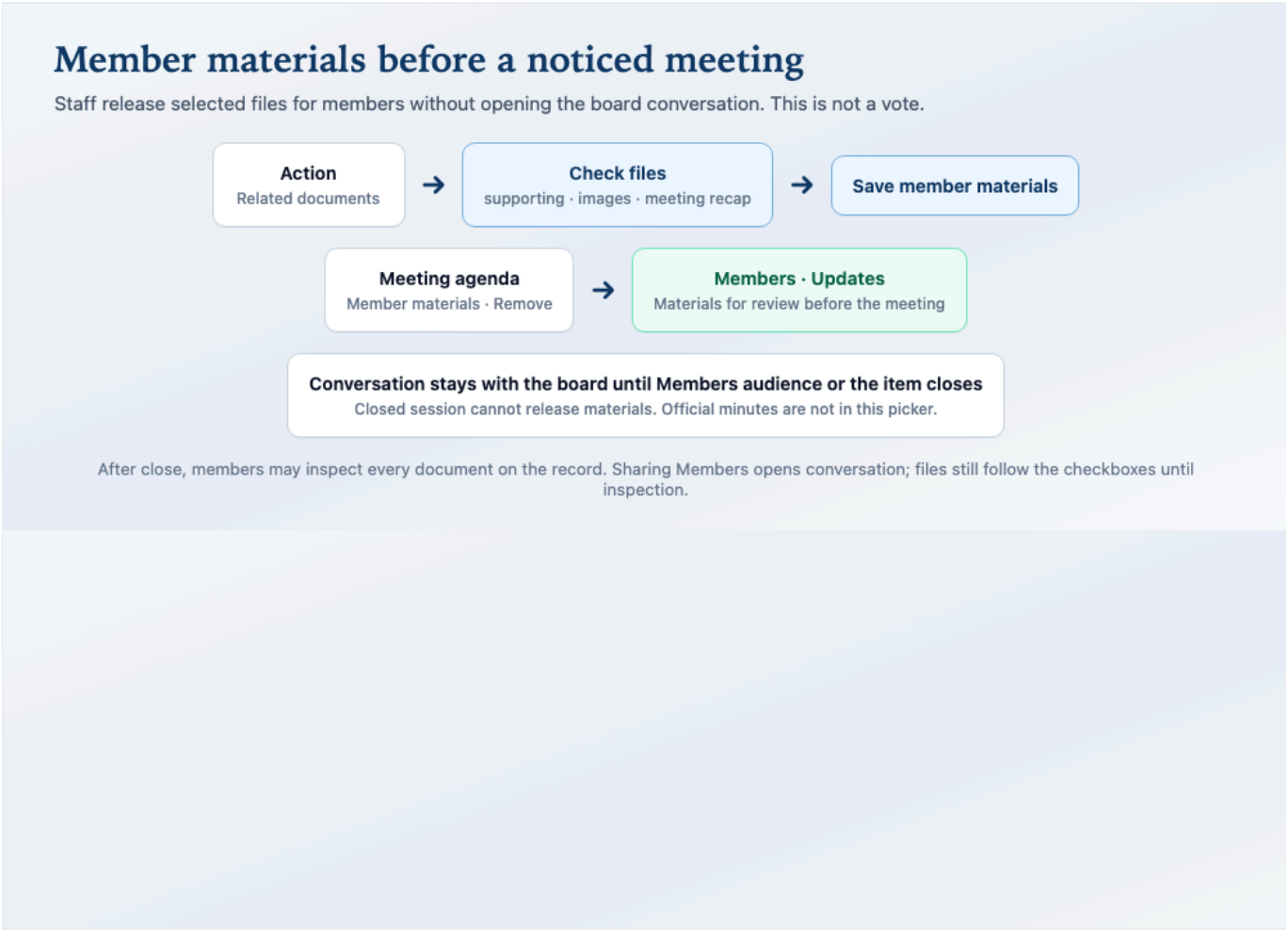
6. Who can see this

Set this on the item. Labels in the product:

Label	While open	After close
Management only	Hidden from board and members	Still hidden from board and members
Board and management only (default)	Members see **progress only** (stages and status). Conversation stays hidden. Files stay hidden unless you release them under Related documents	Members may **inspect** the conversation and every document. Cancelled stays hidden.
Members, board, and management	Members see the item and the conversation. Files still follow the member-materials checkboxes	Same

On an open item you see two bars: **Work stages** (check / filled circle / outline with connecting lines) and **Who can see this**. Staff can **click the chips** (Management / Board / Members) to change who can see this. The selected chip fills in. Work stages are **indicators only** — they are not buttons. Names are in Symbol key. On the public demo, open **Management** → a Docket item to see both bars; **Owners** → **Updates** shows the work-stage track on list rows only.

Member materials (before the meeting): check individual documents, images, or meeting recaps on the Action, then save. Members get those files without the board thread. Changing Who can see this to Members does **not** auto-open every file. Demoting to Management only clears member releases.



Members never post. Drafts and suggestions stay hidden from members.

← Docket

Equipment purchase — $4,850

$4850.00

Consent Agenda Candidate (Purchasing Policy §4.2)

Replace pool pump. Consent agenda candidate with 3 of 4 directors ready.

WORK STAGES

WHO CAN SEE THIS

Management | Board | Members

On the meeting agenda. Documents and conversation stay on this item. This is not a vote.

Meeting recap

Request meeting recap

Conversation

PAT MANAGER · SEP 3, 9:02 PM
Vendor quote is attached. Two pumps compared. Recommending the Hayward 1.5 HP at $4,850 including install and haul-away of the old unit. Three-year parts and labor warranty.

DS DIRECTOR SMITH · SEP 4, 9:02 AM
Quote looks complete. Fine for consent if the three-year warranty is copied into the meeting packet. No other questions.

DJ DIRECTOR JONES · SEP 4, 3:02 PM
Please confirm the old pump is hauled away the same day so we do not leave equipment by the pool fence.

PAT MANAGER · SEP 4, 9:02 PM
Confirmed. Haul-away is in the quote. I placed this on the April consent agenda. Packet will include the warranty page.

DB DIRECTOR BROWN · SEP 5, 3:02 AM
Ready. No further questions from me.

DS DIRECTOR SMITH · SEP 5, 7:11 PM
Ready for the consent agenda
Quote looks complete. Fine for consent if the three-year warranty is in the packet.

DJ DIRECTOR JONES · SEP 5, 7:11 PM
Ready for the consent agenda
Please confirm haul-away the same day.

DB DIRECTOR BROWN · SEP 5, 7:11 PM
Ready for the consent agenda
Ready. No further questions.

PAT MANAGER · SEP 6, 4:09 PM
Vendor quote is attached for the pump replacement.

Activity (6) Expand
Status beats for this item. Not conversation.

Reply as management

Font Arial Size Normal B I U Highlight Clear

Reply to the board

Attach documents
Choose Files No file chosen

Update meeting placement

Currently on the meeting agenda.

Meeting

Garage Door Replacement · 9/17/2026, 9:00:00 AM · consent closed

Agenda section

Consent agenda

Update meeting

READY FOR CONSENT AGENDA — 3 of 5 eligible directors ready. Director Davis, Director Liner has not responded.

Record recusal

Related documents

No documents yet.

Choose File No file chosen Upload

Official Records Inspection Minimize

Output

ZIP — ordinary files Download Mark handed to requester

The ZIP is copies: README.txt, INDEX.txt, conversation.txt, and files/. The requester does not need Board Docket.

Riley Member · Due 9/22/2026 · received

Please produce all writings on the pump purchase.

Request attorney review

Add the attorney's email. They can exclude documents or commentary. The package is released when they confirm. This is not a vote.

Attorney email

Send for attorney review

Item: Equipment purchase — $4,850

Replace pool pump. Consent agenda candidate with 3 of 4 directors ready.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Conversation — Pat Manager

Vendor quote is attached. Two pumps compared. Recommending the Hayward 1.5 HP at $4,850 including install and haul-away of the old unit. Three-year parts and labor warranty.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Conversation — Director Smith

Quote looks complete. Fine for consent if the three-year warranty is copied into the meeting packet. No other questions.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Conversation — Director Jones

Please confirm the old pump is hauled away the same day so we do not leave equipment by the pool fence.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Conversation — Pat Manager

Confirmed. Haul-away is in the quote. I placed this on the April consent agenda. Packet will include the warranty page.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Conversation — Director Brown

Ready. No further questions from me.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Signal — Director Smith (ready for consent)

Quote looks complete. Fine for consent if the three-year warranty is in the packet.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Signal — Director Jones (ready for consent)

Please confirm haul-away the same day.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Signal — Director Brown (ready for consent)

Ready. No further questions.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

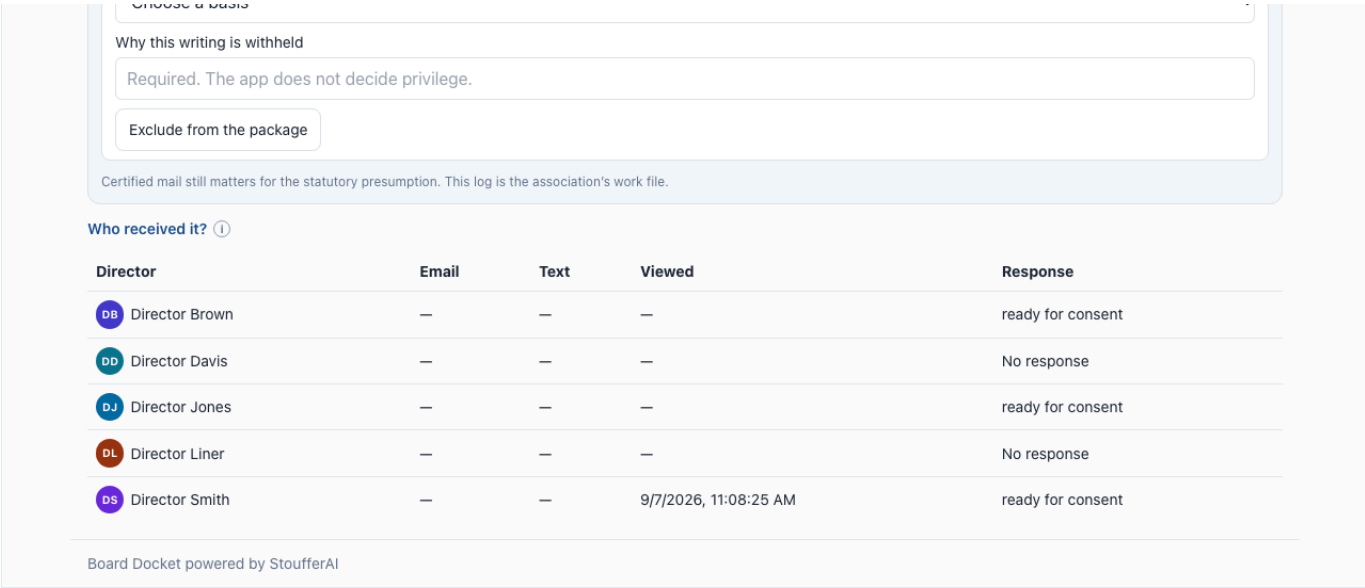
Exclude from the package

Conversation — Pat Manager

Vendor quote is attached for the pump replacement.

Withhold basis

Choose a basis



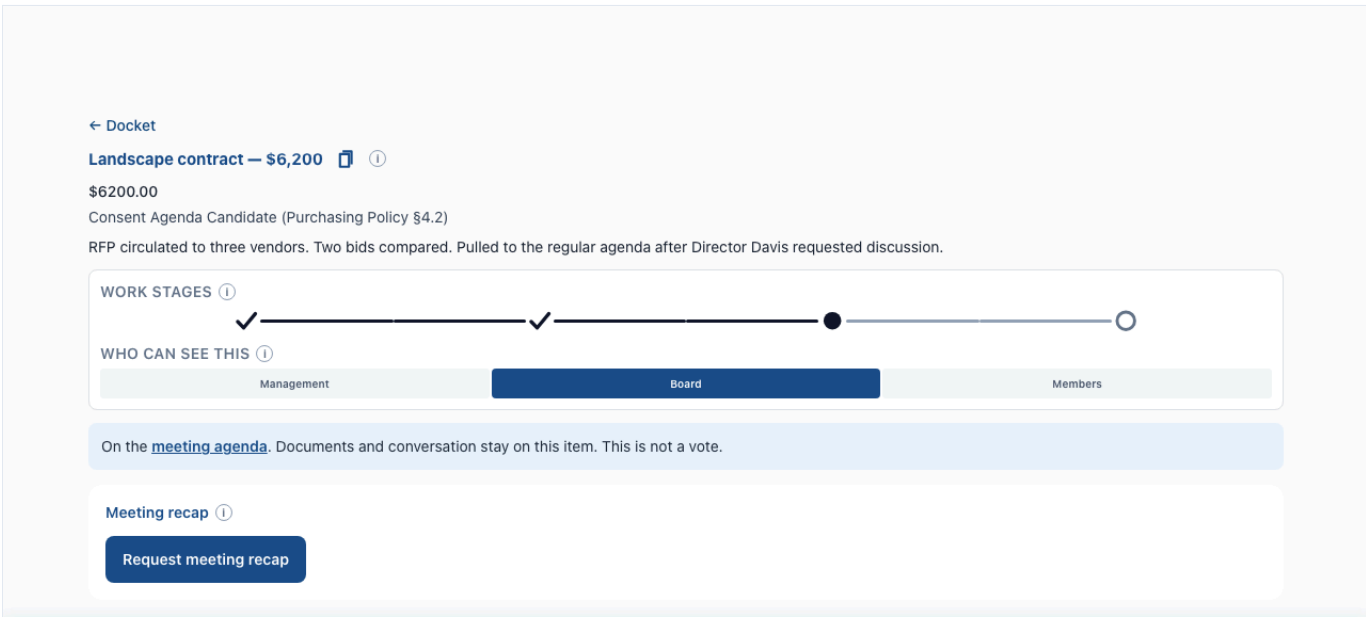
7. Conversation and files

Conversation is the open thread: posts, director signals (Ready / Asked for board discussion), and files added on the item. Directors show a colored identity mark and a timestamp on each turn.

Activity sits under the thread. It is the work-file log of status beats (placed on a meeting, changed who can see this). It starts **collapsed**. Expand to read it; Minimize to hide it. Those lines are not replies.

You **Reply as management**. Directors **Reply as Director**. Posts are association records and may be inspected by a member. **Once posted, a message cannot be edited or withdrawn.** Follow-up with a new post.

Attach files on a reply when they belong to that turn. Use **Open** and **Download** there.



DJ DIRECTOR JONES · AUG 23, 5:00 PM
Confirm all three walk the same beds including the Oak Court slope.

PAT MANAGER · AUG 25, 5:00 PM
Walk completed. All three walked Oak Court. Harbor may no-bid. Waiting on numbers.

PAT MANAGER · AUG 31, 5:00 PM
Two bids are in. Harbor declined. Greenfield is $6,200 for the year. Oak & Pine came in at $7,150 with a wider mulch spec. Both bids are attached.
Greenfield-bid.pdf · Open · Download
Oak-and-Pine-bid.pdf · Open · Download

DD DIRECTOR DAVIS · SEP 1, 5:00 PM
I need the full bid package before consent. Why is Oak & Pine higher, and did both walk the same beds? Please pull this to discussion.

PAT MANAGER · SEP 2, 5:00 PM
Side-by-side is attached. Same walk date. Oak & Pine includes pine straw that Greenfield priced as an extra.
Bid-comparison.pdf · Open · Download

PAT MANAGER · SEP 4, 5:00 PM
I placed this on the regular agenda of the April noticed meeting. The packet is the RFP, both bids, and the comparison.

DS DIRECTOR SMITH · SEP 4, 9:00 PM
Thank you. Regular agenda is the right place. I can support Greenfield if the mulch extra is written as a not-to-exceed.

DB DIRECTOR BROWN · SEP 5, 5:00 PM
I will come prepared for the meeting. No further questions from me.

DS DIRECTOR SMITH · SEP 18, 12:41 PM
Filed from official mail to director.cedarridge@inbound.boarddocket.com.
From: office@oakandpine.example
Subject: Oak & Pine bid follow-up — Oak Court beds

We walked the same beds as Greenfield, including Oak Court slope. The $7,150 figure is a wider mulch spec, not a different walk. Happy to answer questions on the landscape item.

PAT MANAGER · SEP 18, 4:37 PM
The current landscape contract ends May 31. I am drafting an RFP for annual maintenance: mow, beds, mulch, and an irrigation check. Comment on scope before I send it out. This is not a vote.

AP ALEX PRESIDENT · SEP 19, 4:37 PM
Include pine straw versus mulch as an alternate so bids are comparable. Send to at least three vendors.

PAT MANAGER · SEP 20, 4:37 PM
RFP is attached and sent to Greenfield, Oak & Pine, and Harbor Lawn. Walk March 12. Bids due March 19. This is not a vote.

0 Landscape-RFP.pdf · Open · Download

DD DIRECTOR DAVIS · SEP 21, 4:37 PM

Who else was invited? Last year we only got one bid.

DD DIRECTOR DAVIS · OCT 2, 4:37 PM

Asked for board discussion

Need the full bid package

DS DIRECTOR SMITH · OCT 4, 4:37 AM

Ready for the consent agenda

Fine for consent if the mulch extra is written as a not-to-exceed.

DJ DIRECTOR JONES · OCT 4, 4:37 PM

Ready for the consent agenda

Ready once this is on a noticed meeting.

Activity (3) Expand

Status beats for this item. Not conversation.

Reply as management

Font Arial Size Normal B I U Highlight Clear

Reply to the board

Attach documents

Choose Files No file chosen

Update meeting placement

Currently on the meeting agenda.

Meeting

Garage Door Replacement · 9/17/2026, 9:00:00 AM · consent closed

Agenda section

Regular agenda

Closed-session basis

Personnel

☐ Management attends this closed session (typically off for personnel, on for meeting with association attorney)

List counsel on this closed session

☐ Ann Attorney

☐ Morgan Counsel

Update meeting

2 of 5 eligible directors ready. Silence is not counted as ready.

Record recusal

Related documents

☐ 0 Landscape-RFP.pdf · Open · Download

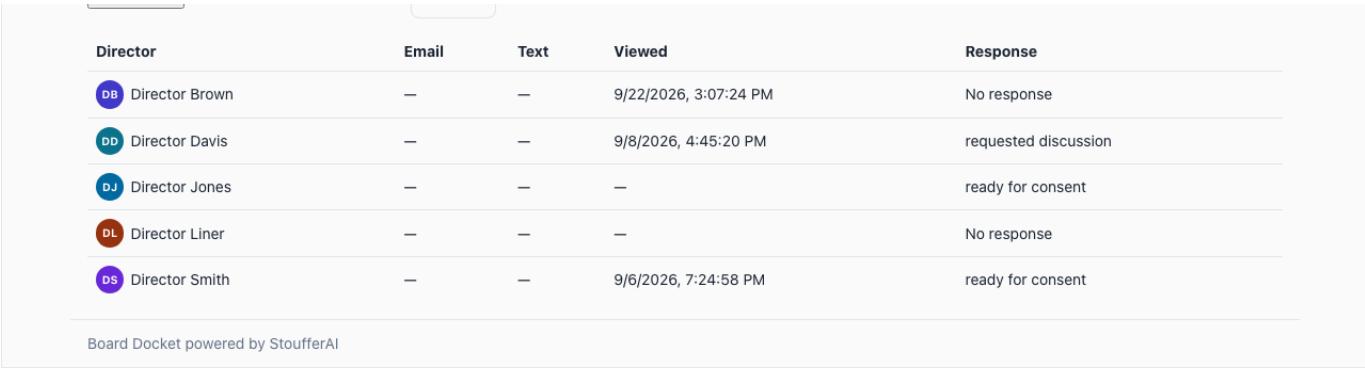
☐ 0 Greenfield-bid.pdf · Open · Download

☐ 0 Oak-and-Pine-bid.pdf · Open · Download

☐ 0 Bid-comparison.pdf · Open · Download

Save member materials

Choose File No file chosen Upload



Director	Email	Text	Viewed	Response
DB Director Brown	—	—	9/22/2026, 3:07:24 PM	No response
DD Director Davis	—	—	9/8/2026, 4:45:20 PM	requested discussion
DJ Director Jones	—	—	—	ready for consent
DL Director Liner	—	—	—	No response
DS Director Smith	—	—	9/6/2026, 7:24:58 PM	ready for consent

Recusal: on an open item, recuse a director seat when that person must not count toward Ready. Recused names appear next to **Record recusal**. **Remove** puts that seat back in the eligible count. Recusal is not a vote.

Consideration → Docket

Suggested items appear on Queue, Mine, and Docket **under consideration**. The board can comment and mark **In favor**. Majority in favor guides the next step; it is not a vote. Directors cannot Advance. **Set aside** requires a reason. **Send to staff** emails engaged management a transcript and, when under email size limits, a ZIP of related documents, then archives the item as management-only. If files exceed email limits, staff get the transcript by email and download each file in Board Docket. Use only for an off-platform handoff; otherwise Advance or keep work in Board Docket.

Open to Advance / Merge

On the Queue list, **Open to Advance / Merge** opens that suggestion. It does not Advance or Merge by itself. On the item you can edit the title and description, then **Advance to Docket**, **Merge into this item**, **Send to staff**, or **Set aside**.

Merge is only on that open item, and only while the suggestions are still under consideration. You choose the related suggestions. Their posts keep the original authors. Their documents move onto this item. The source suggestions are withdrawn.

Advance

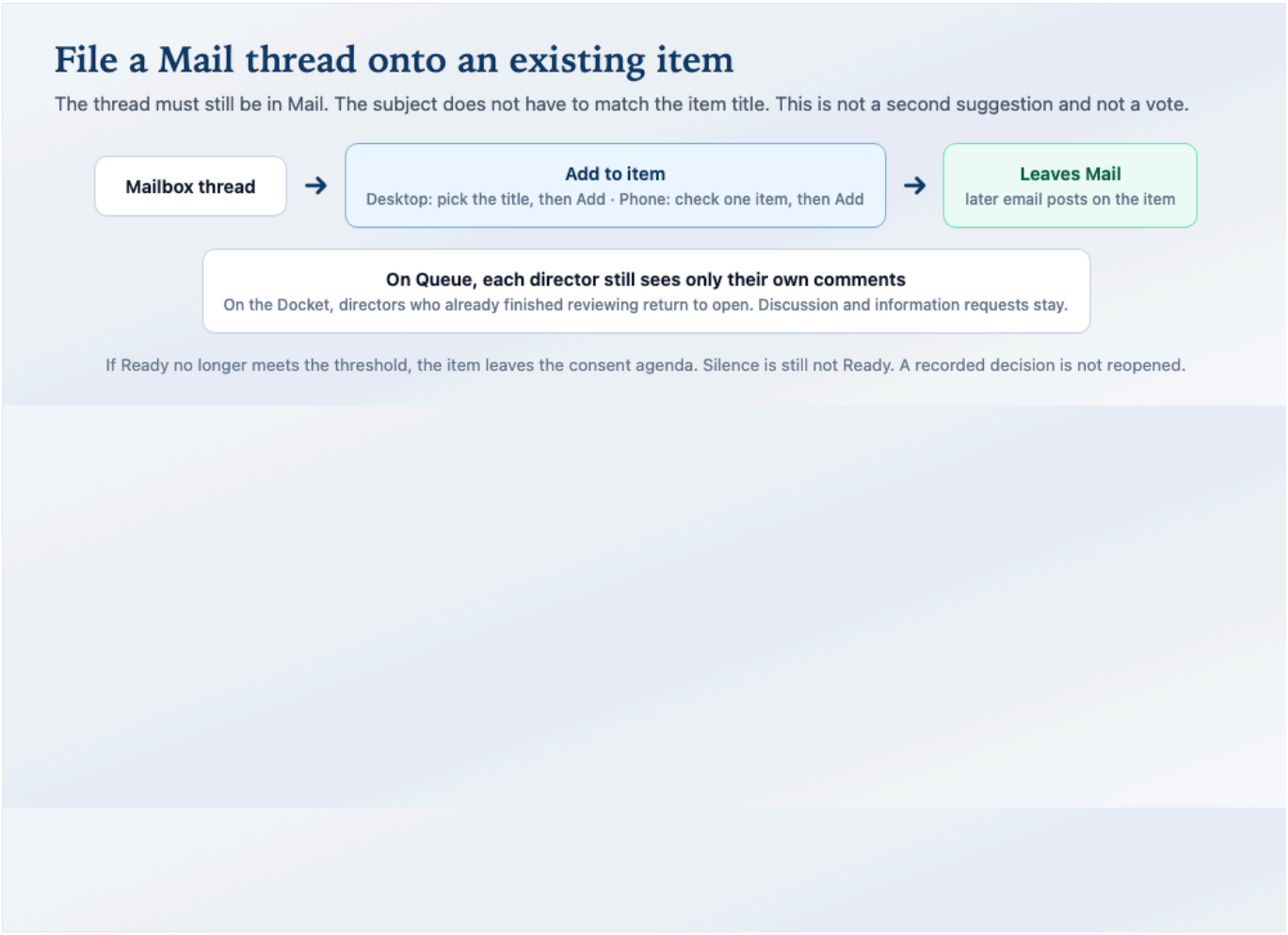
On the Queue list, **Advance** moves that suggestion to the live Docket immediately. Every comment made on the Queue is then visible to every director who can open the item, and to management and the Board Administrator. There is still no Cc. Directors and the Board Administrator are notified. If fewer than a majority have marked **In favor**, that click is the acknowledgment. In favor is a guide, not a vote. **Advance** does not Merge.

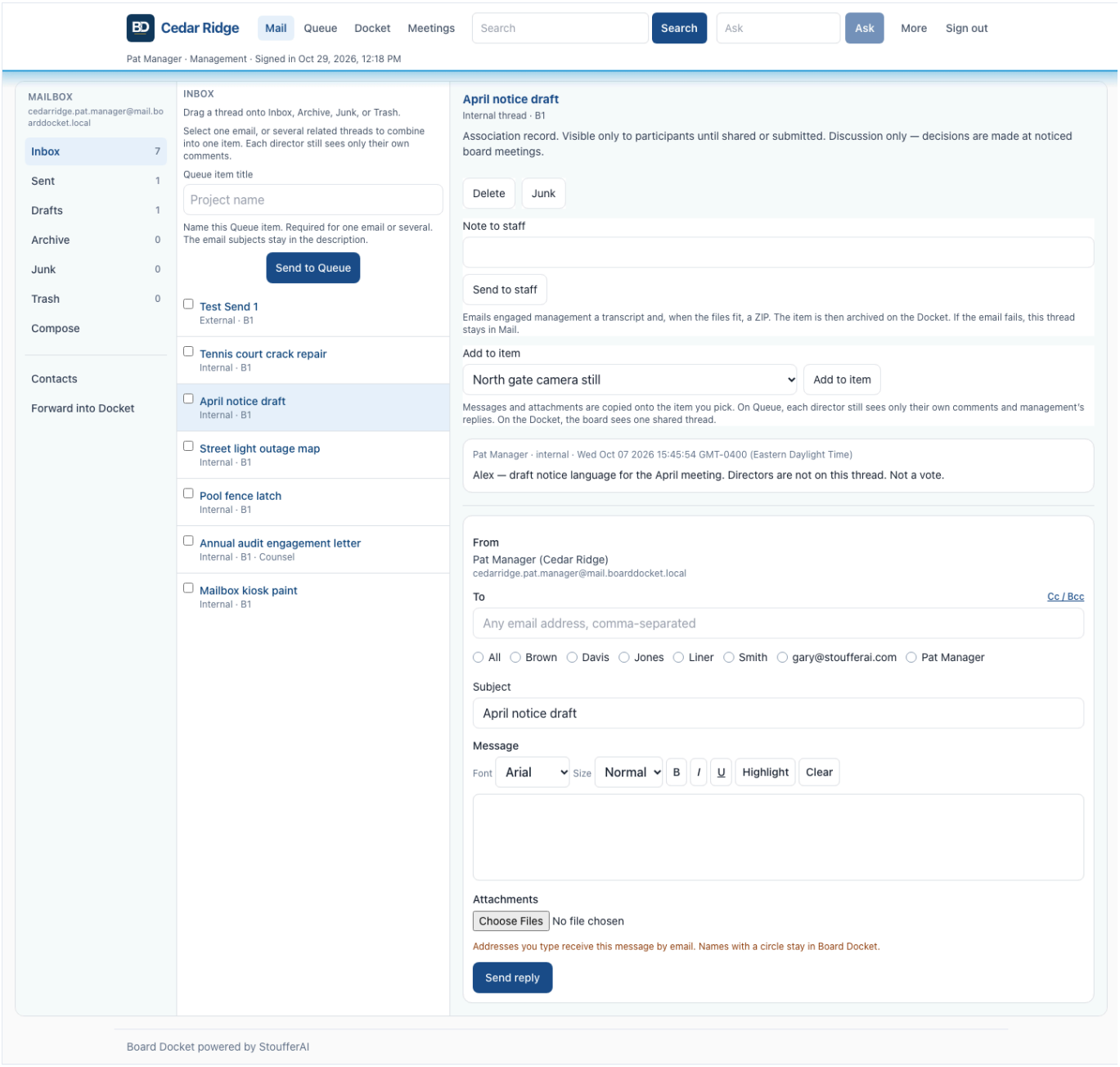
On the open item, the same step is **Advance to Docket**. Below majority, check **Acknowledge Advance below majority** before that button. **Set aside** ends consideration and needs a reason. **Send to staff** emails engaged management a transcript and (when size allows) a ZIP, then archives as management-only. If files exceed email limits, staff download each file in Board Docket. Use only for an off-platform handoff.

Update a live item

Add to item on a Mail thread files that thread onto one existing Queue item or one open Docket item. On desktop, pick the title, then **Add to item**. On the phone, tap **Add to item**, check one row in the Queue or Docket list, then **Add**. The subject does not have to match. Messages and attachments are copied with their authors, and the thread freezes. It does not create a second suggested item. On the Queue there is no Cc. Each director still sees only their own comments and your replies. Other directors do not see those comments. On the Docket, every director who can open the item sees the thread, including every comment made on the Queue. There is still no Cc.

Filing that mail, uploading a document, or posting as management or Board Administrator marks the item updated. Directors who already chose **I've Reviewed This**, **Ready for Consent Agenda**, **Supports**, or **Does not support** return to **Needs your attention**. Earlier responses stay. A request for discussion or more information stays in effect. A director reply does not reset the board. If Ready no longer meets the threshold, the item leaves the consent agenda and returns to awaiting response. Directors signal Ready again. This is not a vote. Silence is still not Ready. An item with a recorded decision is not reopened.

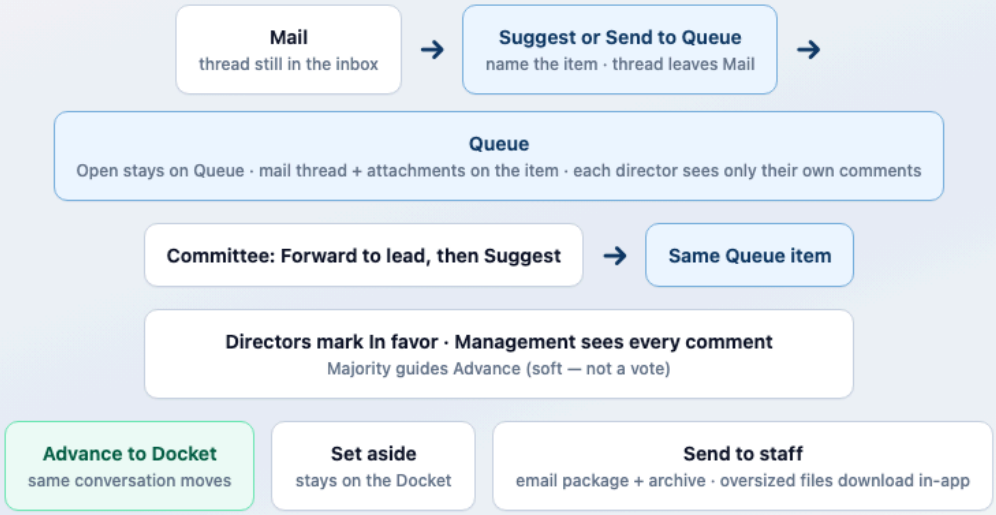




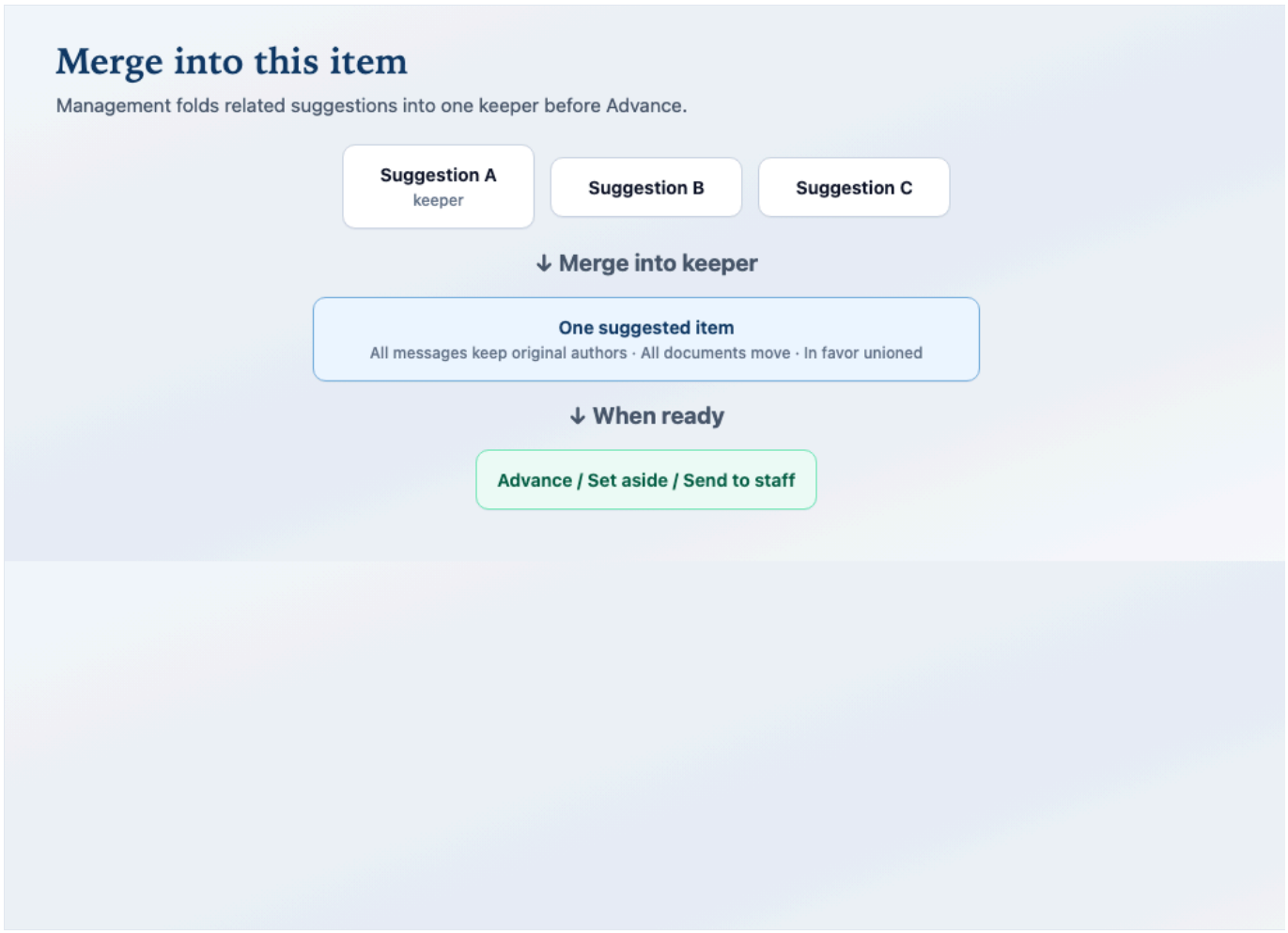
Error messages include a small close control. Closing one removes it.

How a matter reaches the live Docket

Discussion and In favor are not votes. Decisions are made at noticed meetings.



One conversation. It is not in Mail and on the item at the same time. Inbox, Sent, Drafts, Archive, Junk, and Trash are personal. Drag a thread onto Inbox, Archive, Junk, or Trash. Delete and Junk do not erase it. Share with full board, Forward to lead, and Forward to board move your copy to Archive. Send to Queue asks for a project name for one email or several. Mail messages and attachments move onto the Queue item. Later email on a moved thread is posted on the item. Merge related Queue items before Advance. A thread still in Mail can be Add to item on a Queue item or an open Docket item. The subject does not have to match.


Merge into this item
Management folds related suggestions into one keeper before Advance.
Suggestion A
keeper
Suggestion B
Suggestion C
↓ Merge into keeper
One suggested item
All messages keep original authors · All documents move · In favor unioned
↓ When ready
Advance / Set aside / Send to staff

404 | This page could not be found.

8. Official Records Inspection

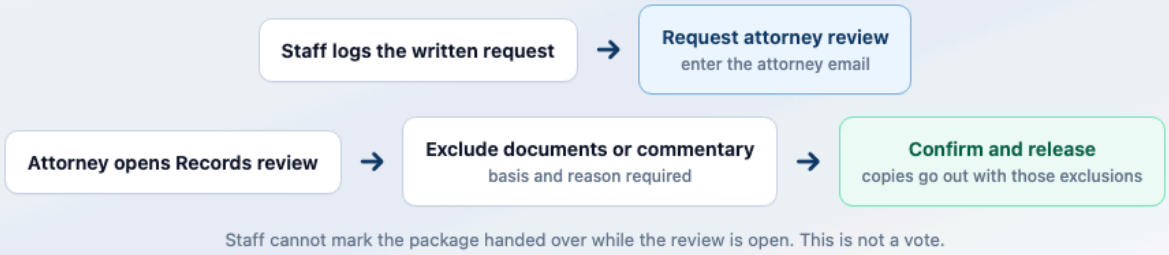
Members may ask in **writing here** (More → Official records) or outside this app. Staff fulfills from **Official records** or from one docket item at a time. A member request may have **zero or more** attached items.

The **Official Records Inspection** block sits near the bottom of the item (click the records mark to jump there). Expand / Minimize like Activity. Log the written request, then download a **ZIP of ordinary files** (README, INDEX, conversation.txt, files/). The requester does not need Board Docket to open them. This is not every official record of the association. This is not a vote.

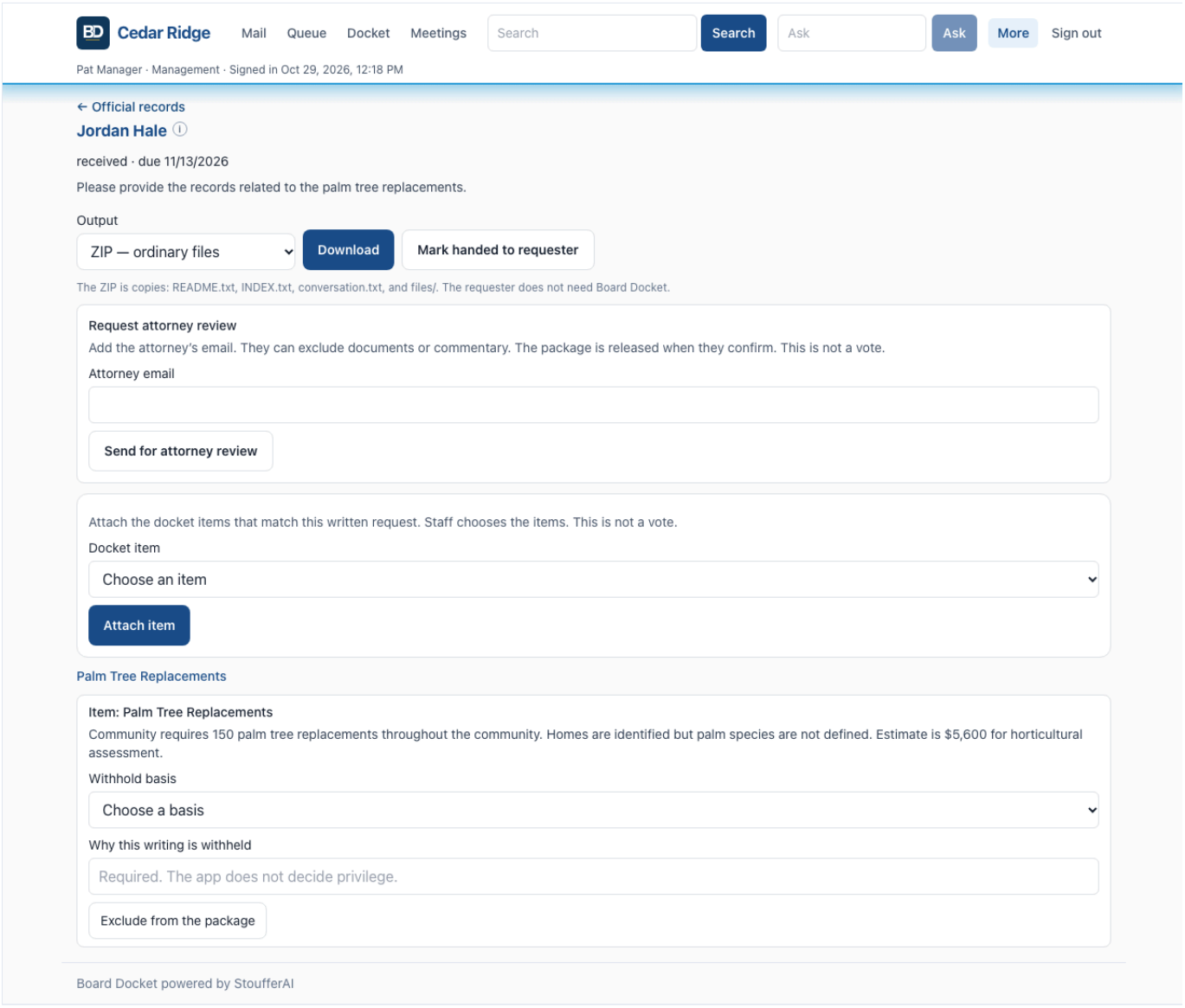
Request attorney review takes an attorney email. The notice does not include the request, document names, or commentary. The attorney opens **Records review**, may exclude a document or commentary with a basis and a reason, and chooses **Confirm and release**. That releases the package. You cannot **Mark handed to requester** while the review is open. The app does not decide privilege.

Attorney review before release

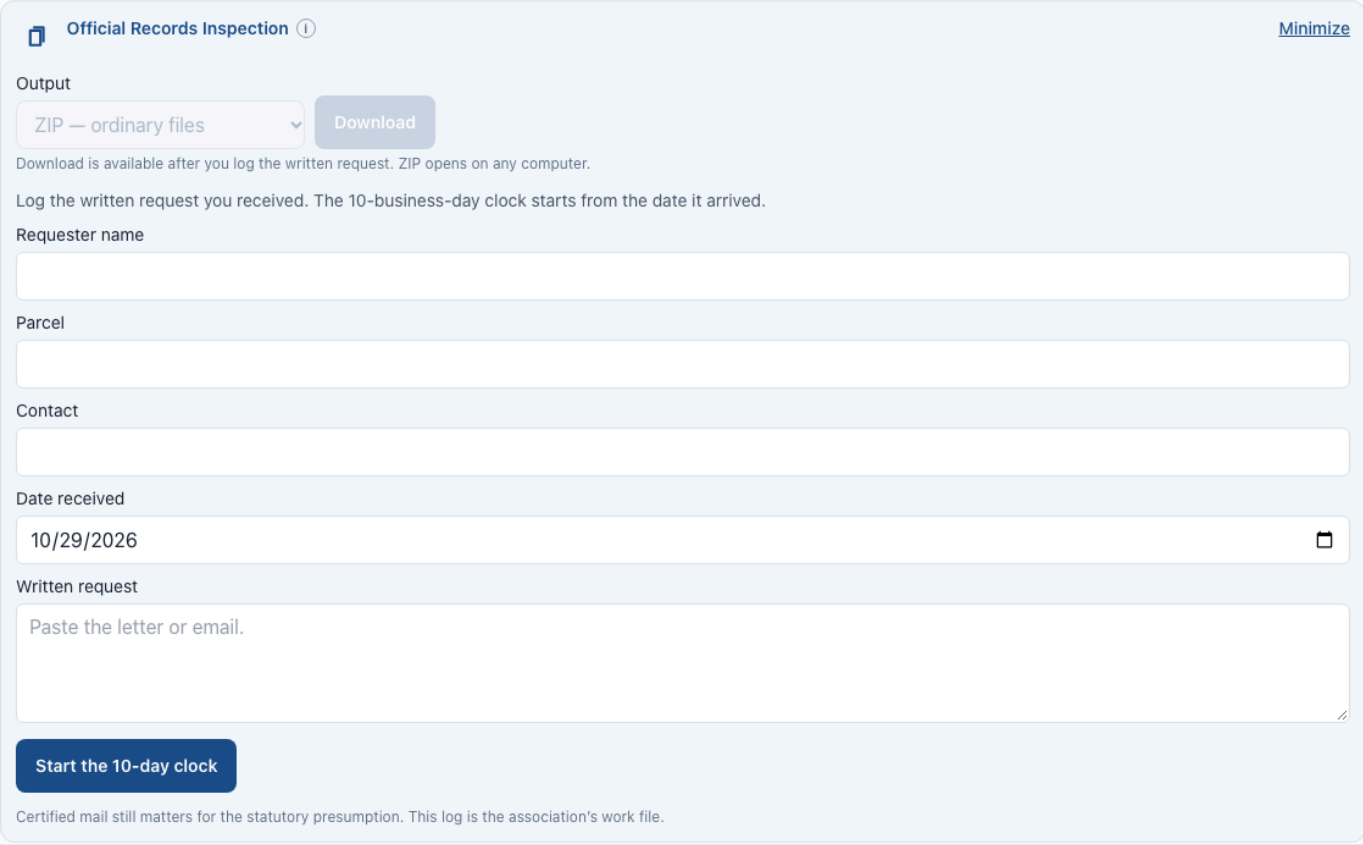
The email does not include the request, document names, or commentary. The app does not decide privilege.



Staff cannot mark the package handed over while the review is open. This is not a vote.



Certified mail still matters for the statutory presumption. This log is the association's work file.



9. Meetings, packet, decision

1. Open **Meetings** for the meeting list, or **Calendar** for the monthly view. **Schedule a noticed meeting** sets the date; it appears on the calendar. Tap a calendar date to open that meeting's agenda, items, and documents.
2. Add an open item from the item page or the meeting page.
3. **Regular agenda** = discussion at the noticed meeting. **Consent agenda** only if the item already reached the Ready threshold. **Closed session** = personnel or meeting with association attorney. Consent items cannot move to closed. List management (default off for personnel, on for lawyer-client) and check association counsel onto that segment. Standing counsel is not a blanket grant.
4. Reorder as needed (Board Administrator or management).
5. On each consent or regular agenda item, review **Member materials** — files already released for members before the meeting. **Remove** a release here, or open the Action to add more. Conversation stays on the Action.
6. Download the **meeting packet (PDF)** for the board packet. It is consent + regular only. Download the **closed-session packet** only if you are on that roster.

7. On an open public item, near the top, Request meeting recap (management or Board Administrator). Do not put a public recap on a closed-session item. The draft uses only that item's conversation, documents, and files. Inspect the **Missing from this item** section, edit, then **Save as document**. It is a summary for the noticed meeting. It is not a vote. It is not minutes. Nothing is the record until you save it. You may then check that recap into member materials if members should see it before the meeting.
8. After the noticed meeting, record the decision. The screen says **Adopted** or **Not adopted** (and deferred / tabled when that is the outcome). Deferred, tabled, or referred items stay open for a later meeting. If management did not attend a closed session, only the Board Administrator records that decision. Counsel cannot record it.
9. **Deposit approved minutes** on the meeting (management only). This is a separate step from discussion files and from the recap. Minutes are usually approved at the next meeting. The PDF is placed on every **public** agenda item's thread. **Closed-session minutes** are a separate PDF onto closed items only. If management did not attend, the Board Administrator deposits them.
10. **Mark completed** only after a final decision (Adopted / Not adopted / No action) **and** every held meeting on that item has minutes on the thread. Closing is not a vote.

Closed session — rules of engagement

How a closed session is **performed** in this app:

1. Use **Closed session** only for a noticed-meeting segment with a stated basis: **Personnel** or **Meeting with association attorney**. Closed items stay on the regular / meeting-required track. They are never consent.
2. Name the roster **per item**. Seated directors and the Board Administrator are always in. Check management only when they should attend (default off for personnel, on for lawyer-client). Check each counsel user who should see **that** segment. Standing counsel still must be listed.
3. Keep talk on the docket item. This is not an executive-session chat, not a private attorney mailbox, and not a vote.
4. Hand the board the **public packet** (consent + regular) and, to the roster only, the **closed-session packet**. Generating the public packet must not include closed Q&A or files.
5. Do not run **Request meeting recap** on a closed item. Recap is not minutes and must not pull closed text into a public summary.
6. After the noticed meeting, record **Adopted** or **Not adopted**. If you were omitted from that roster, only the Board Administrator records it. Counsel never records it.
7. Deposit **closed-session minutes** onto closed items only, same attendee gate. Public minutes stay on public items.
8. On a records request, closed items appear as withhold candidates with the basis pre-filled. Staff still type the justification. The app does not decide privilege. Board-admin ZIP export still includes closed records (the association owns them). Counsel cannot run export.

9. Ending a management engagement does not delete closed-session records. Ending counsel kills that lawyer's sessions; writings stay on the HOA.

Confirm process with association counsel. This book is not legal advice.

Closed session — restrictions

Restriction	What the product enforces
Members	Never see closed items on Updates, including after complete. They may see only that a noticed meeting has a closed segment if the association publishes a public agenda outside this app. Closed items cannot be shared as member-visible.
Management	See a closed item only if that session's roster includes management. Omitted staff cannot open the item or record the decision.
Counsel	Association counsel, not a member. Open only closed items they are listed on, plus a records package sent to their email for review. No ordinary docket, Billing, seats, branding, export, or the Official records list. Cannot demote the Board Administrator.
Consent	A consent-agenda item cannot move to closed.
Public packet / recap	Consent + regular only. No closed thread, files, or recap text.
Decision chrome	No Approve / Reject. Decision UI is still Adopted / Not adopted. Counsel cannot record it.
Privilege	Closed placement hides the item from members. A records ZIP still requires a human exclusion with justification.
Ownership	Firing management does not delete closed-session records.

Meetings

Calendar

- **March board meeting**
  Wednesday, Aug 12, 2026, 8:43 AM · held · Posted (48 hours) · consent closed
- **Garage Door Replacement**
  Thursday, Sep 17, 2026, 9:00 AM · upcoming · Posted (48 hours) · consent closed
- **April board meeting**
  Saturday, Sep 19, 2026, 7:11 PM · upcoming · Posted (48 hours) · consent closed
- **Sunday board meeting**
  Sunday, Oct 4, 2026, 3:00 PM · upcoming · Posted (48 hours) · consent closed

Schedule a noticed meeting

After you set the date, it appears on the Calendar.

Title

Board meeting

Date

mm/dd/yyyy

Time

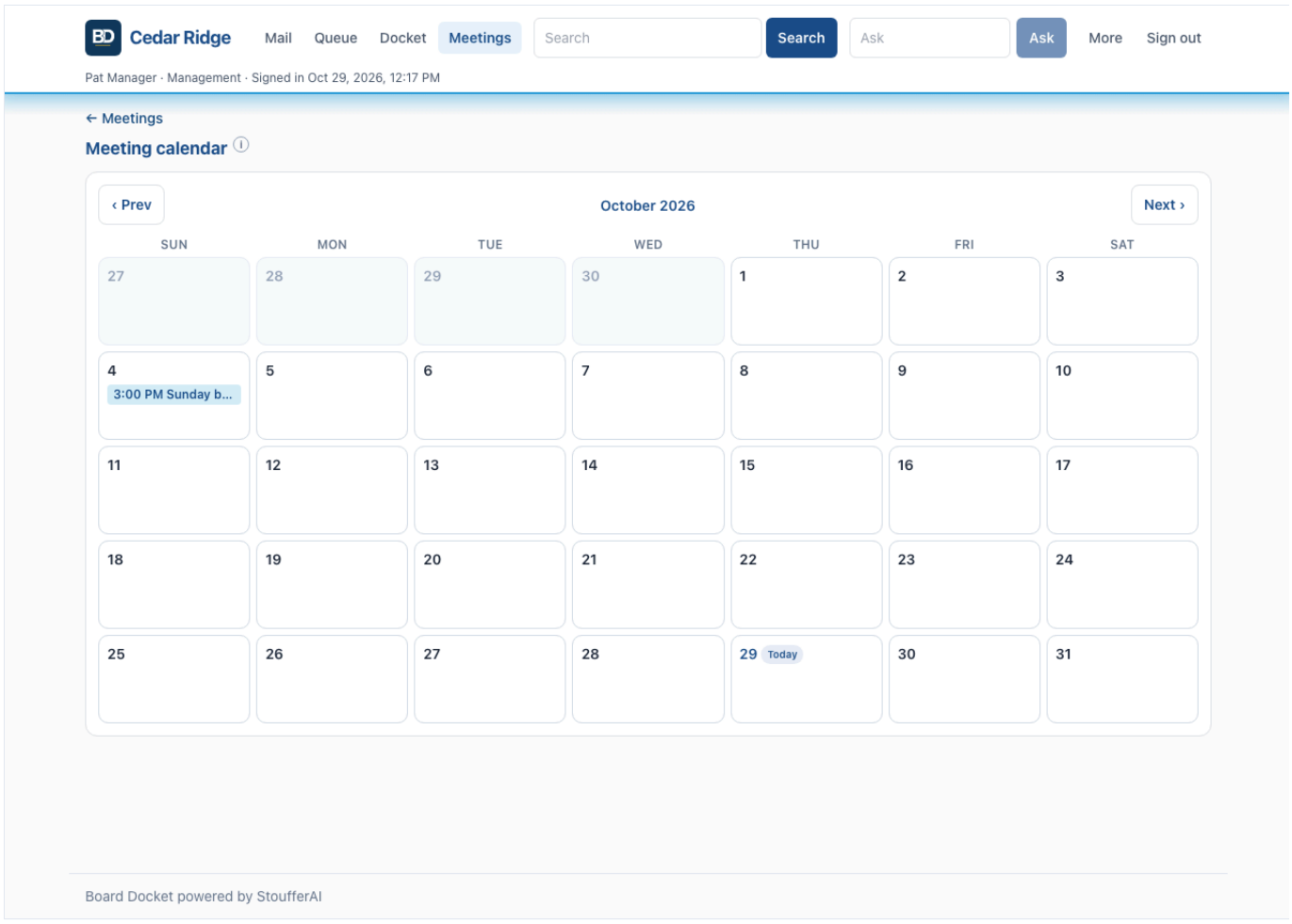
7 | 00 | PM

Pick any day — Saturday and Sunday are allowed.

Notice type

Posted (48 hours)

Create meeting


Cedar Ridge
Mail
Queue
Docket
Meetings
Search
Search
Ask
Ask
More
Sign out
Pat Manager · Management · Signed in Oct 29, 2026, 12:17 PM
← Meetings
Meeting calendar
‹ Prev
October 2026
Next ›
SUN
MON
TUE
WED
THU
FRI
SAT
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Today
30
31
Board Docket powered by StoufferAI

← Meetings

April board meeting

Saturday, Sep 19, 2026, 7:11 PM · upcoming
Notice: Posted (48 hours) · Consent deadline Thursday, Sep 17, 2026, 7:11 PM (consent closed)

Download meeting packet (PDF)
Download closed-session packet (PDF)

Official minutes

Official minutes (PDF)
Choose File No file chosen
Accepted at a later meeting (optional)
Not recorded
Deposit official minutes

Closed-session minutes

Closed-session minutes (PDF)
Choose File No file chosen
Accepted at a later held meeting (optional)
Not recorded
Deposit closed-session minutes

Add an Action

Action
Clubhouse HVAC service agreement · suggested
Agenda section
Regular agenda
Closed-session basis
Personnel
Management attends this closed session (typically off for personnel, on for meeting with association attorney)
List counsel on this closed session
Ann Attorney
Morgan Counsel
Add to this meeting

Consent Agenda

Equipment purchase — $4,850
Consent Agenda Candidate (Purchasing Policy §4.2) · on consent agenda

Member materials
Files released for members before the meeting. Conversation stays on the Action.
None released yet.
Add or change on the Action

Move up Move down

Record decision
Adopted
Vote tally (optional)
Resolution number (optional)

Resolution number (optional)

Record formal decision

Regular Agenda

Landscape contract — $6,200

Consent Agenda Candidate (Purchasing Policy §4.2) · meeting required

Member materials

Files released for members before the meeting. Conversation stays on the Action.

None released yet.

Add or change on the Action

Move up | Move down

Record decision

Adopted

Vote tally (optional)

Resolution number (optional)

Record formal decision

Roof replacement — $15,000

Board Meeting Required (Purchasing Policy §4.3) · meeting required

Member materials

Files released for members before the meeting. Conversation stays on the Action.

None released yet.

Add or change on the Action

Move up | Move down

Record decision

Adopted

Vote tally (optional)

Resolution number (optional)

Record formal decision

Irrigation main break — emergency repair

Acted Under Emergency Authority (Purchasing Policy §4.4) · ratification pending

Member materials

Files released for members before the meeting. Conversation stays on the Action.

None released yet.

Add or change on the Action

Move up | Move down

Record decision

Adopted

Vote tally (optional)

Resolution number (optional)

Record formal decision

Closed session



Close correspondence when the talk is done and the item was never a meeting decision.

Archive completed or cancelled items to clear them from active lists.

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10. Mailbox (and Docket forward)

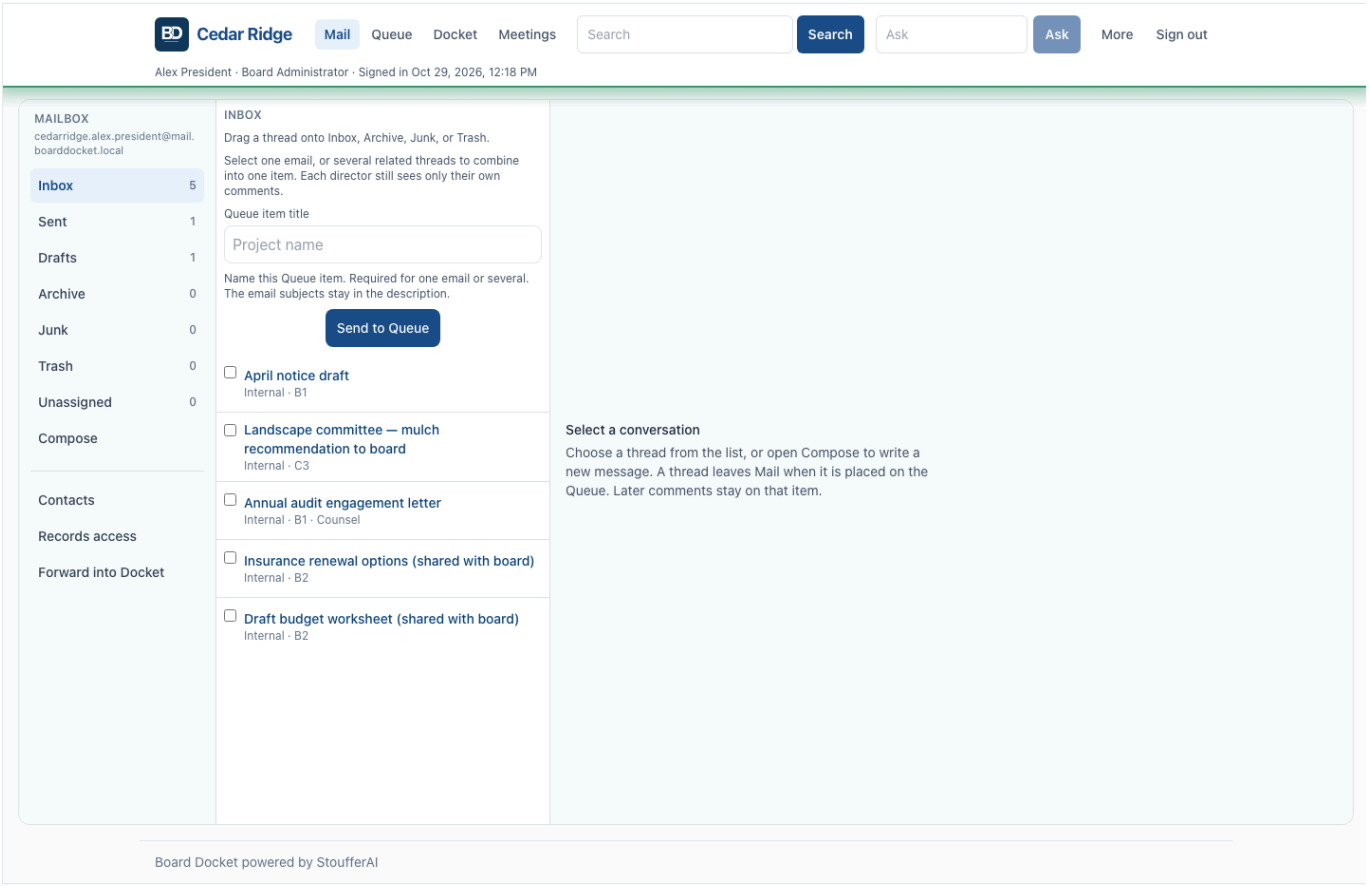
Mail is the first tab for engaged management, directors, counsel, and committee members. On desktop it is a three-pane email client (folders · thread list · reading/compose) on `mail.boarddocket.com`. Folders are **Inbox**, **Sent**, **Drafts**, **Archive**, **Junk**, and **Trash**. Drag a thread onto Inbox, Archive, Junk, or Trash. **Delete** and **Junk** hide it from you only. **Restore to Inbox** brings it back. A received message is not erased. **Share with full board**, **Forward to lead**, and **Forward to board** move your copy to Archive. **Send to staff** on a thread still in Mail emails engaged management and archives the item on the Docket. If that email fails, the thread stays in Mail. It lists only threads that are not yet on an item. **Suggest for consideration** or **Send to Queue** places the conversation on the Queue and removes those threads from Mail. **Send to Queue** asks for a project name for one email or several. The email subjects stay in the description. On the Queue, one director's comments are not shown to the other directors: each director still sees only their own comments and your replies. Management and the Board Administrator see every director's comments. There is no Cc on the Queue or the Docket. Advance is what opens every Queue comment to every director who can open the item. Management is not added when a director shares with the full board, or when a committee lead forwards to the board. A suggested item is not a staff-only draft. Committee rooms are managed by the Board Administrator (**More → Committees**). Mailbox records access for custodian export is separate from member Official Records Inspection and needs a noticed-meeting approval entry by the Board Administrator. Confirm with association counsel; not legal advice.

Opening a conversation uses the **same form as Compose**: From, To, Cc/Bcc, formatting, and attachments. To, Cc, and Bcc decide who sees that Mail thread and who can reply. Anyone not addressed does not. **Cc / Bcc** opens those fields. **Hide Cc / Bcc** closes them. To, Cc, and Bcc each include a box for any email address, comma-separated. Addresses you type receive the message by email. On To, **All**, each director, and the manager are names with a circle. **All** selects everyone on that line. Names with a circle stay in Board Docket. Counsel, the board administrator, and contacts are not listed. The subject stays the one already on the thread. **Send reply** posts on that conversation. **Save**

draft and **Send as** are for a new message. Adding an outside address on a reply makes that thread external, and later messages on it go to those addresses. **Discuss privately** still starts a separate internal thread.

Add to item files a thread that is still in Mail onto one Queue item under consideration or one open Docket item. On desktop, pick the title, then **Add to item**. On the phone, one button opens the list; check one item, then **Add**. The subject does not have to match. Messages and attachments are copied. That thread then leaves Mail. Later email on it is posted on the item. On the Queue there is no Cc. Each director still sees only their own comments and your replies. On the Docket, every director who can open the item sees the thread, including every comment made on the Queue. Directors who had finished reviewing that item go back to open.

In Mailbox, open folder **Forward into Docket** for the association inbound address (`actions+…@inbound…`). **Engaged management and the Board Administrator only** — directors do not see this folder. That creates a staff **Docket draft** (subject → title, body → description), not a Mailbox thread. Allowed attachments are imported (up to **15 MB** each, **45 MB** total per message). Oversized or disallowed files are skipped; the item shows a note listing what was not imported. This path skips consideration when the board already directed staff to file it.



Cedar Ridge | Mail | Queue | Docket | Meetings | Search | Search | Ask | Ask | More | Sign out

Director Smith · Director · Signed in Oct 29, 2026, 12:18 PM

MAILBOX
cedarridge.director.smith@mail.boarddocket.local

- Inbox 13
- Sent 5
- Drafts 2
- Archive 0
- Junk 0
- Trash 0
- Compose

INBOX

Drag a thread onto Inbox, Archive, Junk, or Trash.

- Tennis court crack repair — Internal · B1
- Guest parking signs — wording — Internal · B1
- Roof reserve study — questions for next packet — Internal · B1 · Counsel
- Landscape committee — mulch recommendation to board — Internal · C3
- Clubhouse Wi-Fi upgrade estimate — Internal · B1
- Street light outage map — Internal · B1
- Pool fence latch — Internal · B1
- Gate motor service window — External · B1
- Pool heater quote — private review — Internal · B1
- Annual audit engagement letter — Internal · B1 · Counsel
- Mailbox kiosk paint — Internal · B1
- Insurance renewal options (shared with board) — Internal · B2
- Draft budget worksheet (shared with board) — Internal · B2

Pool heater quote — private review

Internal thread · B1

Association record. Visible only to participants until shared or submitted. Discussion only — decisions are made at noticed board meetings.

Share with full board | Suggest for consideration

Opens a Queue item for the board and management to comment. It is not live on the Docket until management Advances it. This is not a vote. This cannot be undone.

This shares the thread. Your copy moves to Archive, where you can open it again.

Delete | Junk

Director Smith · internal · Mon Oct 05 2026 12:50:36 GMT-0400 (Eastern Daylight Time)

Jones — two heater quotes attached in my notes. Discussion only; not a vote.

Director Jones · internal · Mon Oct 05 2026 14:50:36 GMT-0400 (Eastern Daylight Time)

Thanks. Prefer the unit with the longer warranty before we ask management to package it.

From
Director Smith (Cedar Ridge)
cedarridge.director.smith@mail.boarddocket.local

To | Cc / Bcc

Any email address, comma-separated

All | Brown | Davis | Jones | Liner | Smith | gary@stoufferai.com | Pat Manager

Subject

Pool heater quote — private review

Message

Font Arial | Size Normal | B | I | U | Highlight | Clear

Attachments

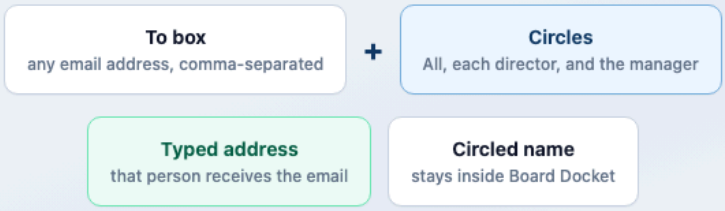
Choose Files | No file chosen

Addresses you type receive this message by email. Names with a circle stay in Board Docket.

Send reply

Same form for a new message and a reply

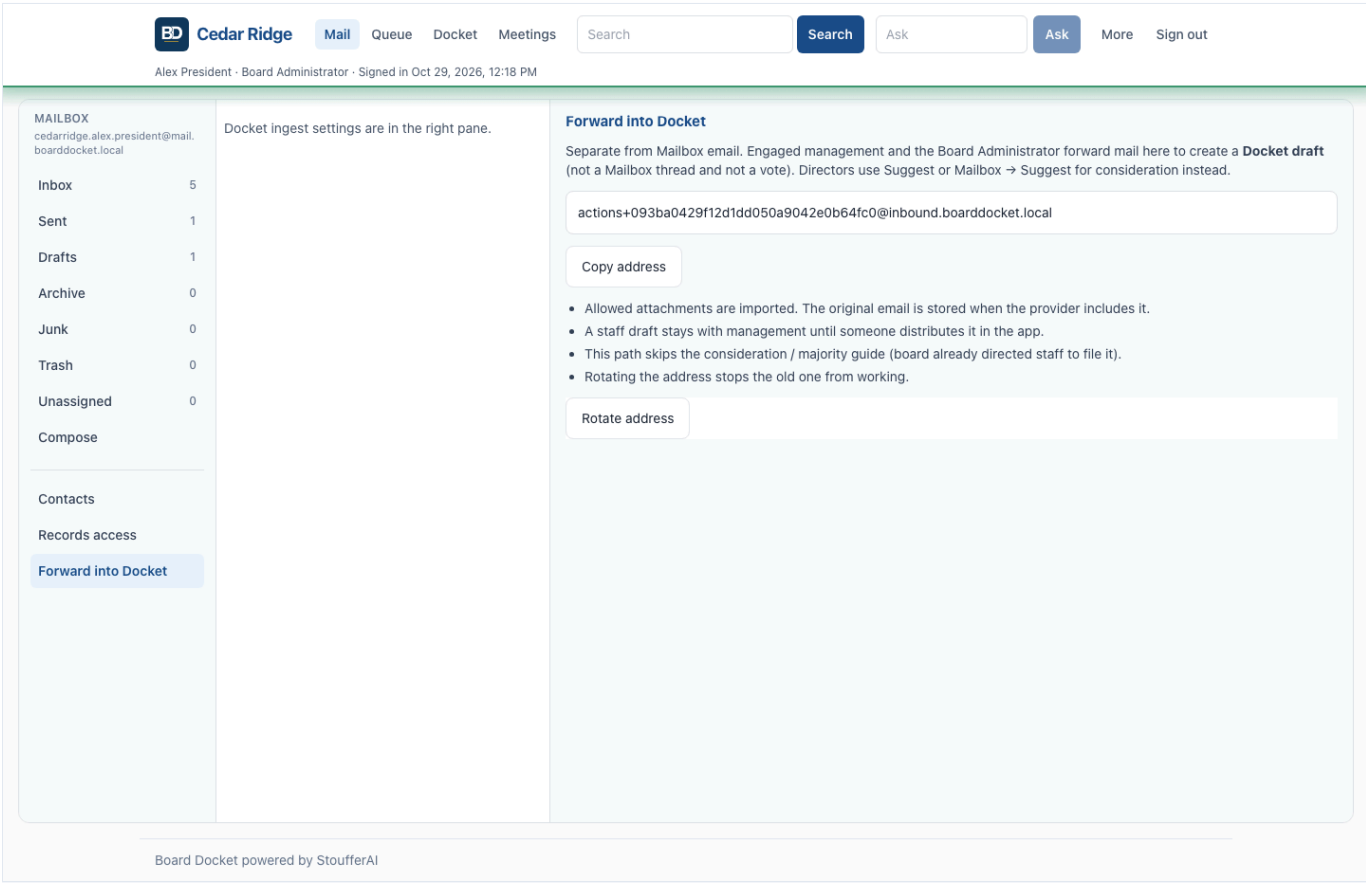
To, Cc, and Bcc each have a box for any email address. Names with a circle stay in Board Docket.



A reply that adds an outside address makes the thread external

Later messages on it go to those addresses. Discuss privately starts a separate internal thread. The subject stays on the conversation.

Save draft and Send as are for a new message. Send reply posts on the open conversation. Drag a thread onto Inbox, Archive, Junk, or Trash. Those bins are yours alone. This is not a vote.

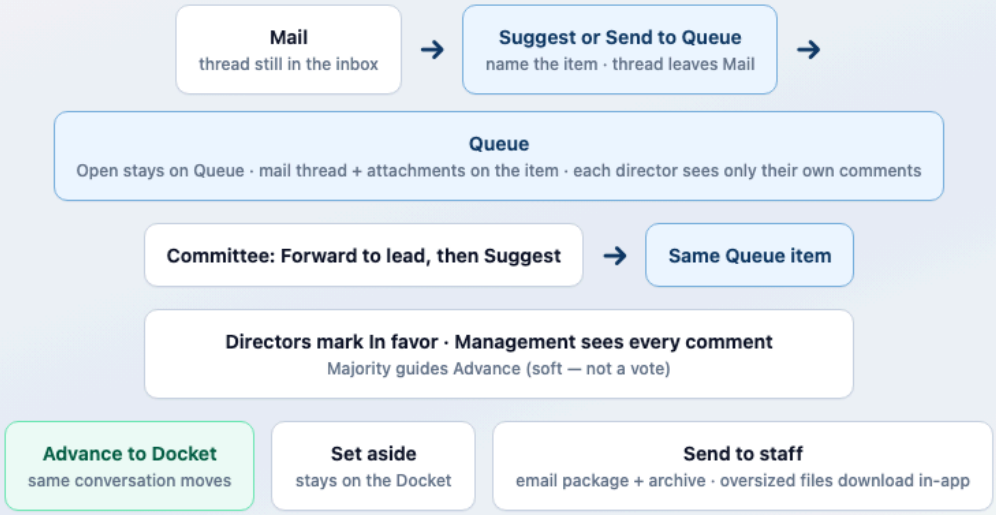


Consideration → Docket

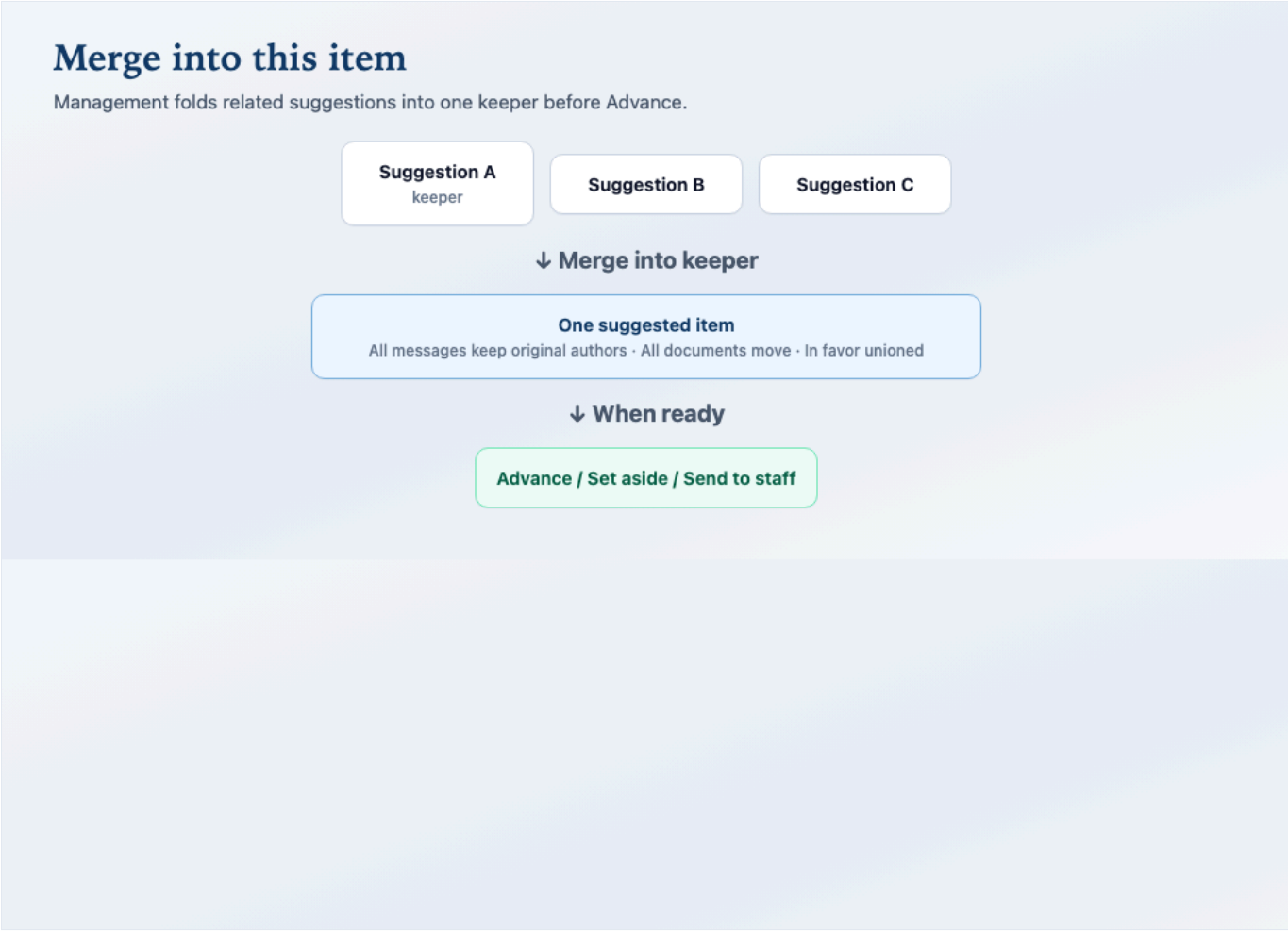
Suggested items stay on the Queue until you **Advance**, **Set aside**, or **Send to staff**. On the list, **Open to Advance / Merge** opens the suggestion so you can **Advance to Docket** or **Merge into this item**. **Advance** on the list moves that item to the Docket immediately, including when a majority is not **In favor**. That click is the acknowledgment. It is not a vote and it does not Merge. Set aside stays on the Docket so it does not return to Mail. Directors may mark **In favor**. On the Queue there is no Cc. They do not see one another's comments. Management and the Board Administrator see every director's comments. **Advance** moves that item to the Docket. Every comment made on the Queue is then visible to every director who can open the item, and to management and the Board Administrator. There is still no Cc. **Merge** keeps original authors and moves the documents; the source suggestions are withdrawn. Use **Send to Queue** in Mail when the sources are still separate threads and the matter is new. Name the item for one email or several. Use **Add to item** when a thread still in Mail belongs on an item that is already on Queue or the Docket. Rotate the inbound address if it leaks.

How a matter reaches the live Docket

Discussion and In favor are not votes. Decisions are made at noticed meetings.



One conversation. It is not in Mail and on the item at the same time. Inbox, Sent, Drafts, Archive, Junk, and Trash are personal. Drag a thread onto Inbox, Archive, Junk, or Trash. Delete and Junk do not erase it. Share with full board, Forward to lead, and Forward to board move your copy to Archive. Send to Queue asks for a project name for one email or several. Mail messages and attachments move onto the Queue item. Later email on a moved thread is posted on the item. Merge related Queue items before Advance. A thread still in Mail can be Add to item on a Queue item or an open Docket item. The subject does not have to match.



11. Search and reports

Header **Search** finds items by title or description.

More → Reports: days and dollars waiting from Ready-threshold to a recorded meeting decision, counts by status, and a **who saw what** projection from the audit log (views, responses, downloads).

Search

Reports

Meeting recaps are requested on the Action, not here. Open the item and use **Request meeting recap**.

Waiting on a meeting decision

$0.00 waiting.

No items have reached the Ready threshold yet.

Actions by status

- ratification pending — **1**
- draft — **7**
- declined suggestion — **1**
- correspondence open — **2**
- meeting required — **4**
- suggested — **6**
- completed — **1**
- awaiting response — **1**
- on consent agenda — **1**
- decision recorded — **1**

Who saw what

- DS Director Smith · viewed · Landscape contract — $6,200 · Oct 23, 3:09 PM
- DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 23, 3:01 PM
- DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 23, 3:01 PM
- DS Director Smith · viewed · Landscape contract — $6,200 · Oct 23, 3:00 PM
- DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 23, 2:24 PM
- DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 23, 2:24 PM
- DS Director Smith · viewed · Landscape contract — $6,200 · Oct 23, 2:23 PM
- DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 23, 12:27 PM
- DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 23, 12:26 PM
- DS Director Smith · viewed · Landscape contract — $6,200 · Oct 23, 12:24 PM
- DS Director Smith · viewed · Landscape contract — $6,200 · Oct 23, 9:48 AM
- DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 23, 9:47 AM
- DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 23, 9:46 AM
- DS Director Smith · viewed · Landscape contract — $6,200 · Oct 23, 7:38 AM
- DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 23, 7:36 AM
- DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 23, 7:36 AM
- DS Director Smith · viewed · Pool heater — waiting for minutes · Oct 22, 2:42 PM

DS Director Smith · viewed · Clubhouse hours — posted notice · Oct 22, 2:42 PM

DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 10, 11:45 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 10, 11:45 AM

DS Director Smith · viewed · Landscape contract — $6,200 · Oct 10, 11:44 AM

DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 9, 11:32 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 9, 11:32 AM

DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 9, 10:49 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 9, 10:48 AM

DS Director Smith · viewed · Weekend amenity hours — related suggestion · Oct 9, 10:47 AM

DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 9, 10:24 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 9, 10:24 AM

DS Director Smith · viewed · Weekend amenity hours — related suggestion · Oct 9, 10:22 AM

DS Director Smith · viewed · South entrance paint — suggested from Mailbox · Oct 9, 10:08 AM

DS Director Smith · viewed · South entrance paint — suggested from Mailbox · Oct 9, 10:07 AM

DS Director Smith · viewed · South entrance paint — suggested from Mailbox · Oct 9, 10:07 AM

DS Director Smith · viewed · Weekend amenity hours — related suggestion · Oct 9, 9:59 AM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Oct 8, 7:47 PM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Oct 8, 7:44 PM

DS Director Smith · viewed · Fence staining question on Oak Court · Oct 8, 7:17 PM

DS Director Smith · viewed · Insurance claim — meeting with association attorney · Oct 8, 3:45 PM

DS Director Smith · viewed · Irrigation main break — emergency repair · Oct 8, 3:45 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 8, 2:53 PM

DS Director Smith · viewed · Front Entrance · Oct 8, 2:53 PM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 5, 10:23 AM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 5, 9:20 AM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 5, 9:20 AM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 5, 9:19 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 5, 9:19 AM

DS Director Smith · viewed · Equipment purchase — $4,850 · Oct 4, 8:22 PM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 4, 8:22 PM

PM Pat Manager · document opened · Test 8 · Oct 4, 8:19 PM

PM Pat Manager · document opened · Test 8 · Oct 4, 8:19 PM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 4, 8:24 AM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Sep 26, 3:10 PM

DS Director Smith · viewed · Equipment purchase — $4,850 · Sep 26, 3:09 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 26, 3:08 PM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Sep 22, 6:55 PM

DS Director Smith · viewed · Equipment purchase — $4,850 · Sep 22, 6:54 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 22, 6:54 PM

DS Director Smith · viewed · Equipment purchase — $4,850 · Sep 22, 1:23 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 22, 1:23 PM

AP Alex President · viewed · Vendor scheduling — irrigation start-up · Sep 17, 4:37 PM

AP Alex President · viewed · Florest Schedule · Sep 17, 4:36 PM

AP Alex President · viewed · Palm Tree Replacements · Sep 17, 4:25 PM

AP Alex President · viewed · Clubhouse hours — posted notice · Sep 17, 3:07 PM

AP Alex President · viewed · Clubhouse hours — posted notice · Sep 17, 3:07 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:38 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:38 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:37 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:37 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:37 PM

GL Greg Liner · viewed · Test 8 · Sep 9, 5:14 PM

GL Greg Liner · viewed · Front Entrance · Sep 9, 2:44 PM

GL Greg Liner · viewed · Front Entrance · Sep 9, 2:34 PM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Sep 9, 10:32 AM

DS Director Smith · viewed · Pool heater — waiting for minutes · Sep 9, 8:45 AM

DS Director Smith · viewed · Pool heater — waiting for minutes · Sep 9, 8:45 AM

DS Director Smith · viewed · Pool heater — waiting for minutes · Sep 9, 8:45 AM

DS Director Smith · viewed · Equipment purchase — $4,850 · Sep 8, 9:18 PM

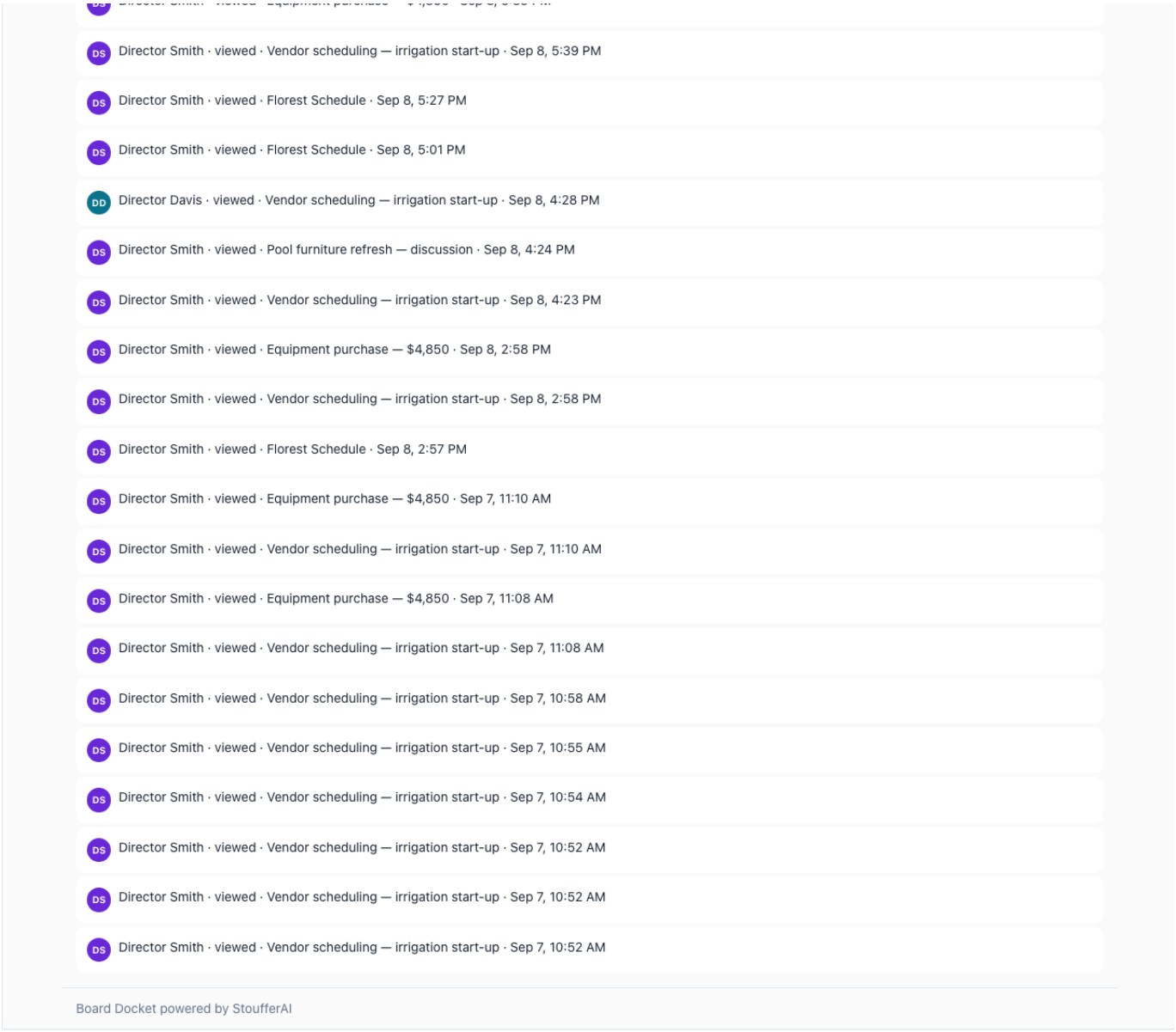
DS Director Smith · viewed · Front Entrance · Sep 8, 9:18 PM

DS Director Smith · viewed · Front Entrance · Sep 8, 9:17 PM

DS Director Smith · viewed · Front Entrance · Sep 8, 9:16 PM

DD Director Davis · viewed · Front Entrance · Sep 8, 7:11 PM

DS Director Smith · viewed · Equipment purchase — $4,850 · Sep 8, 5:39 PM

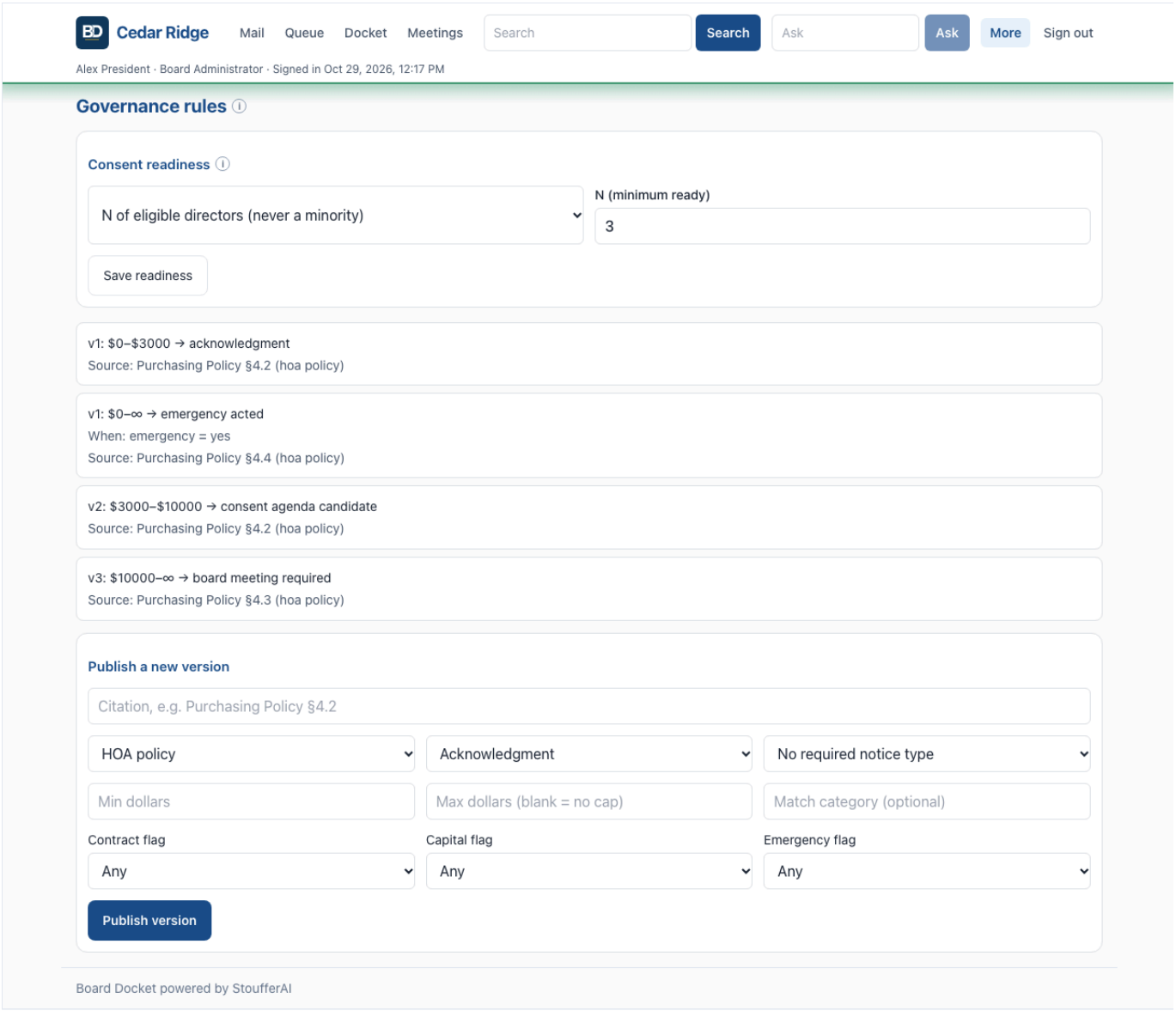


12. Board Administrator tools

These sit under **More**. Management staff do not get seats, members, counsel, branding, backup, or engagement end unless they are Board Administrator (or, for billing, allowed to pay).

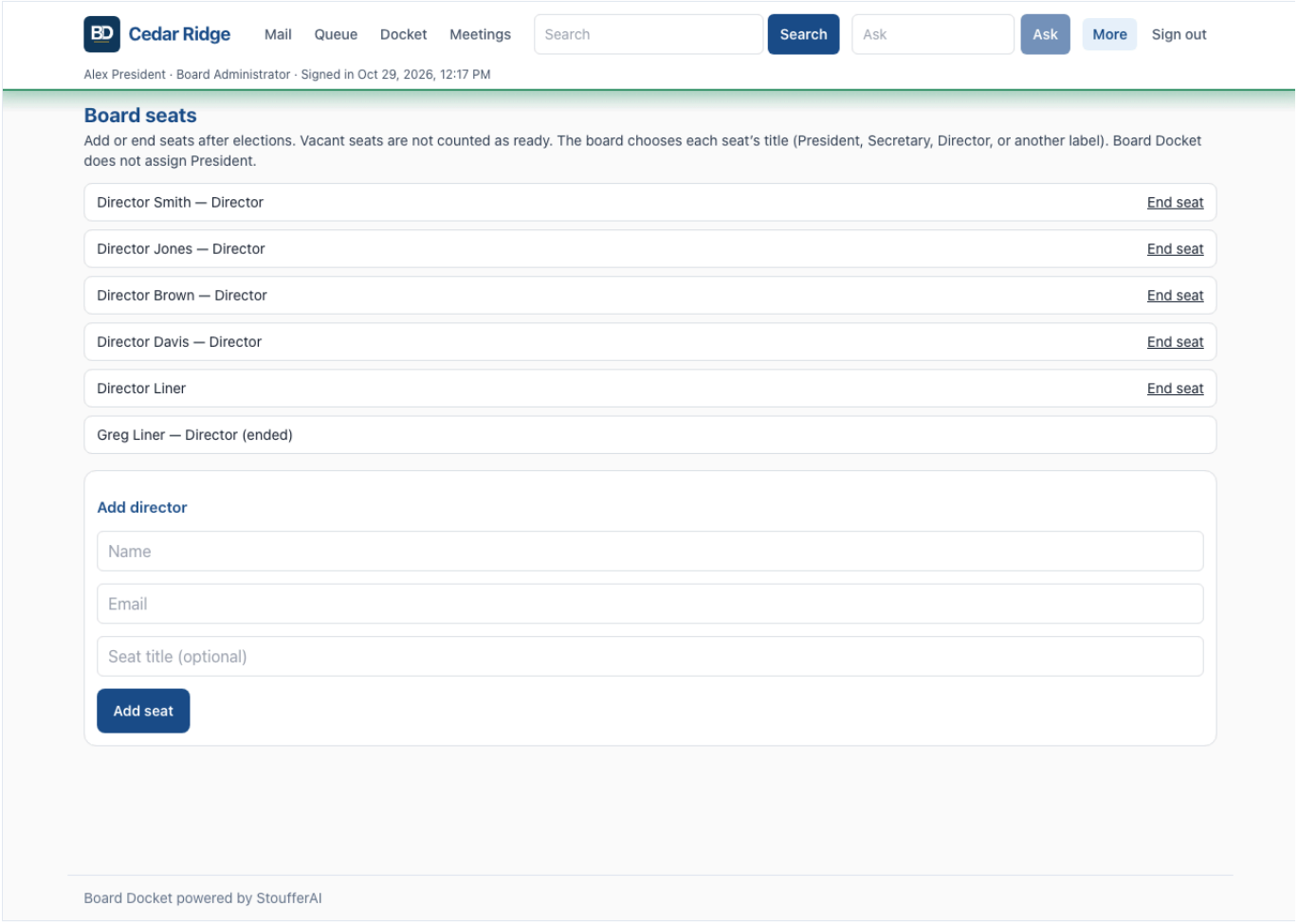
Governance rules

Map dollar bands (and optional flags) to item types. Each version cites its source (policy, governing document, resolution). The app does **not** host a Florida-statute library. **Consent readiness** is how many eligible directors must signal Ready (vacant and recused seats are out of the count).



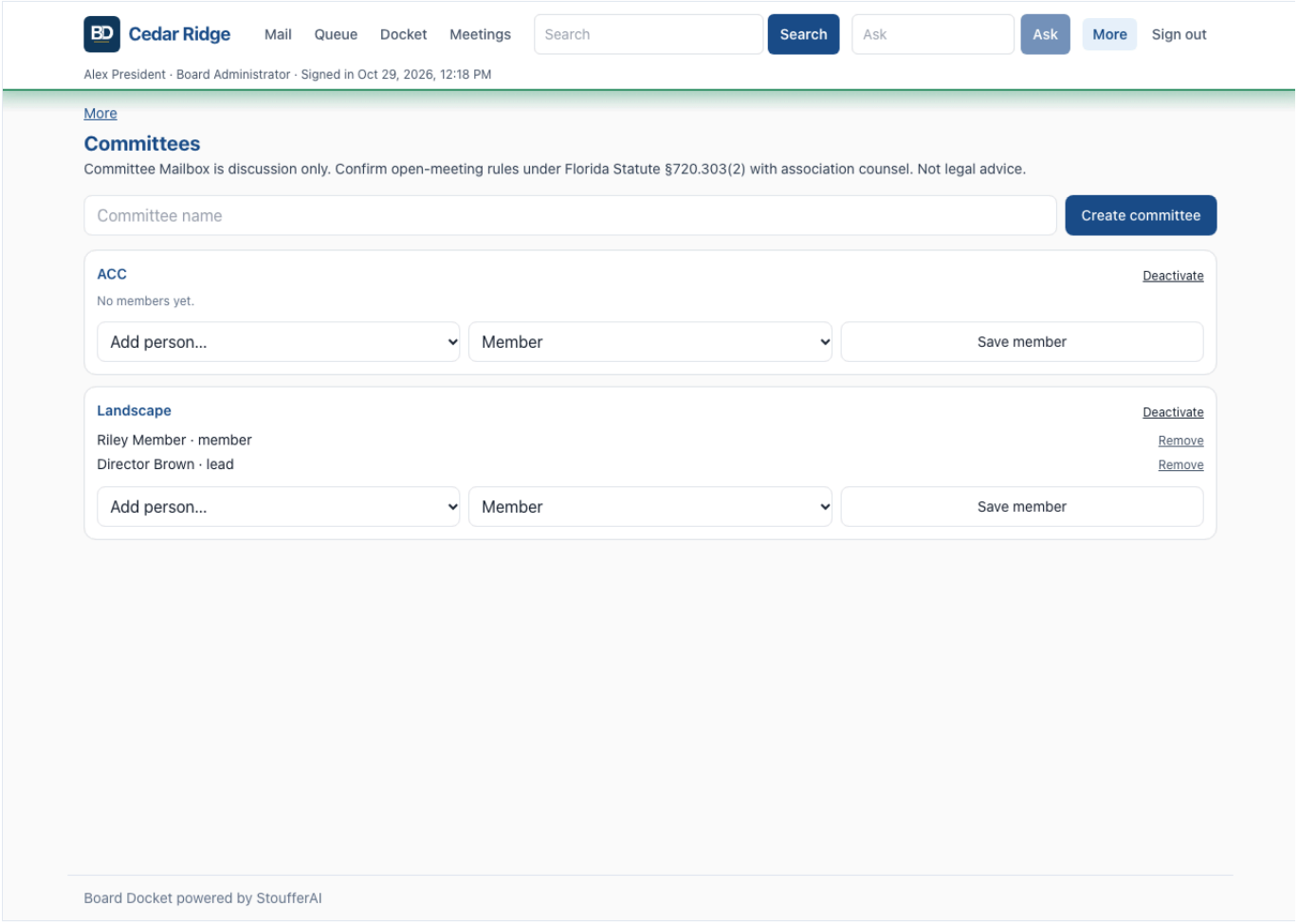
Board seats

Add or end director seats after elections. Each seat gets a welcome sign-in email. The **seat title** is whatever the board chooses (President, Secretary, Director, or another label). Board Docket does not assign President.



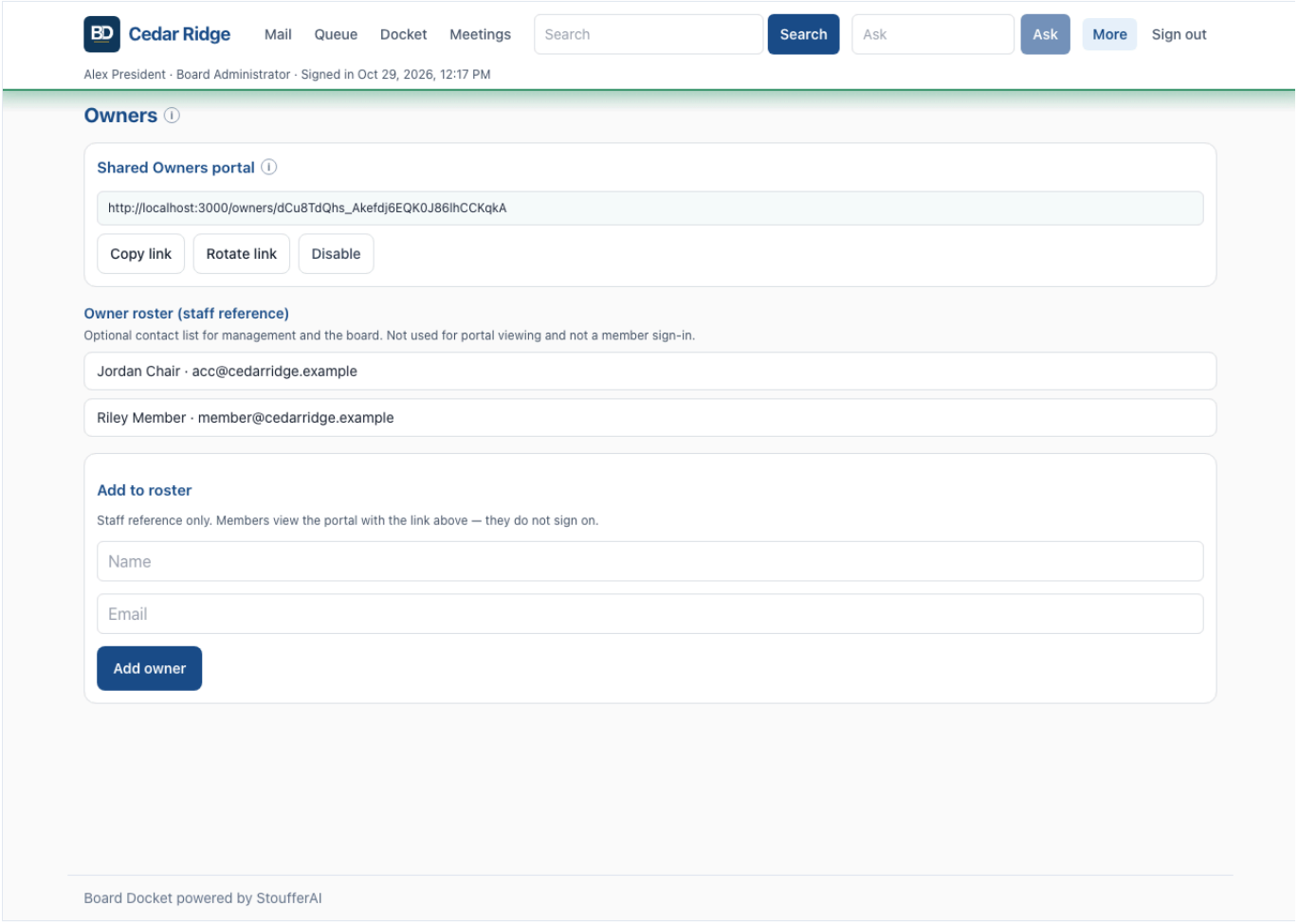
Committees

More → Committees (Board Administrator). Create a committee, set one **lead**, and add members (often association members). Membership is not a HOA role — it is a separate roster. Committee users get the **Mail** tab for that room only. Elevations: Forward to lead → lead (or a seated director after Forward to board) may **Suggest for consideration**. That opens a suggested Docket item for board and management comment — not a live matter and not a vote. Management is not auto-added on Forward to board. Confirm FS 720.303(2) with association counsel. Not legal advice.



Members (Owners)

Members **do not sign in** to Board Docket for ordinary viewing. Under **More → Owners**, enable the **Shared Owners portal** link and paste it once on the association's secure member website. The portal shows released and shared materials plus a meeting calendar. Day-to-day releases update in Board Docket — you do not re-publish the HOA site for each file. Treat the link like a shared password; **Rotate** if it leaks.



The owner roster on that page is staff reference only (optional). It is not required for portal viewing. Members cannot post or vote. See the Members Manual for the public demo Owners tab; live associations use the portal link.

Counsel

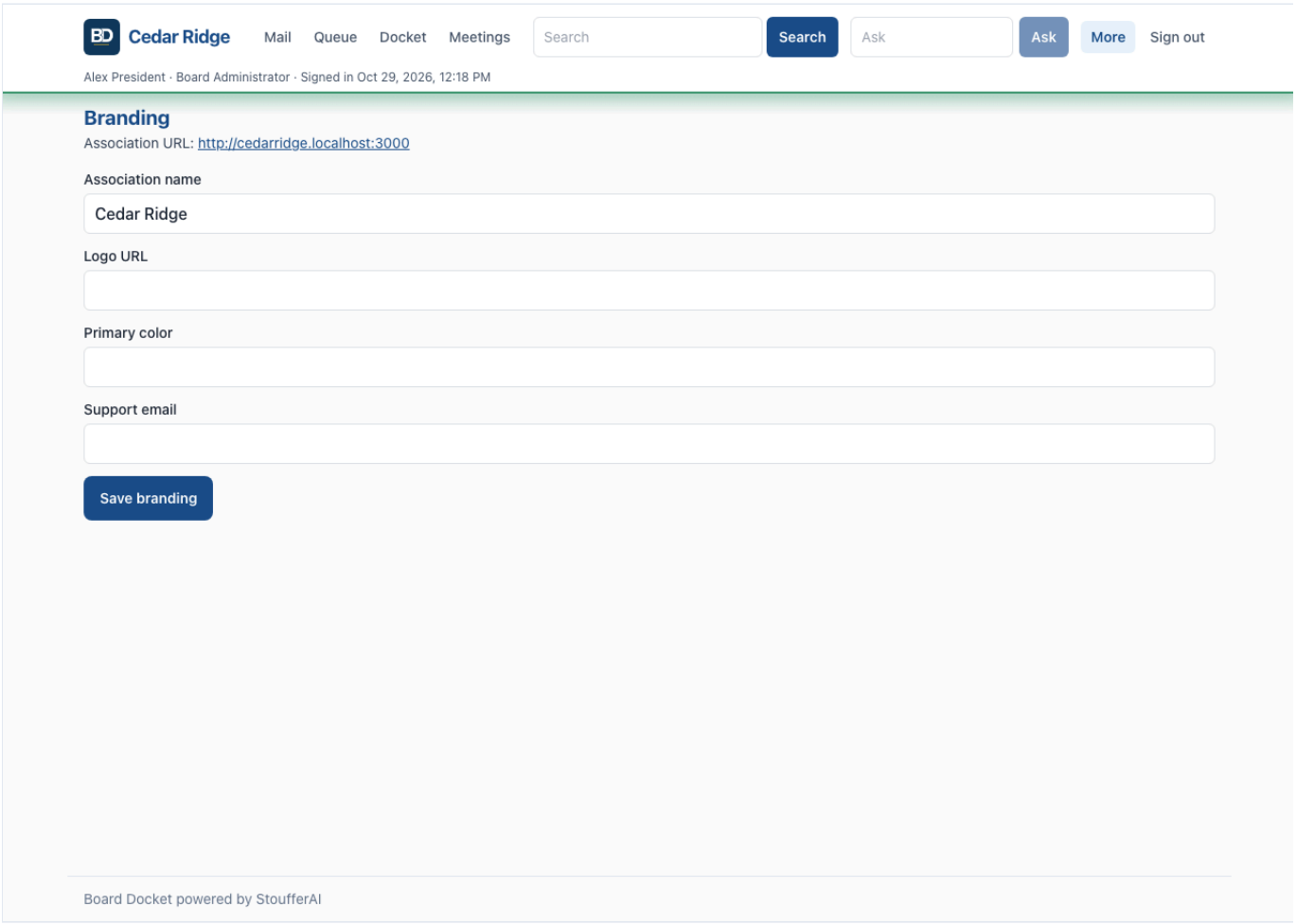
More → Counsel (Board Administrator). Name, email, optional firm. Same 6-digit sign-in code as everyone else. Welcome email: they are association counsel on this HOA; this is not a member login and not a vote. Reject the invite if that email already has any role on this HOA.

Counsel is **not** a member and not a director. Their home is **Closed sessions**. They see only closed-session items you list them on. They reply as **Reply as counsel**. Ending counsel kills their sessions; writings stay on the association. See the Counsel Manual and §9 rules of engagement.

When you place an item on **Closed session**, pick **Personnel** or **Meeting with association attorney**, choose whether management attends, and check the counsel who should see that segment. Standing counsel still must be listed on each closed item. Confirm process with association counsel. The app does not decide privilege. On a records request, closed items appear as withhold candidates with that basis pre-filled; staff still type the justification.

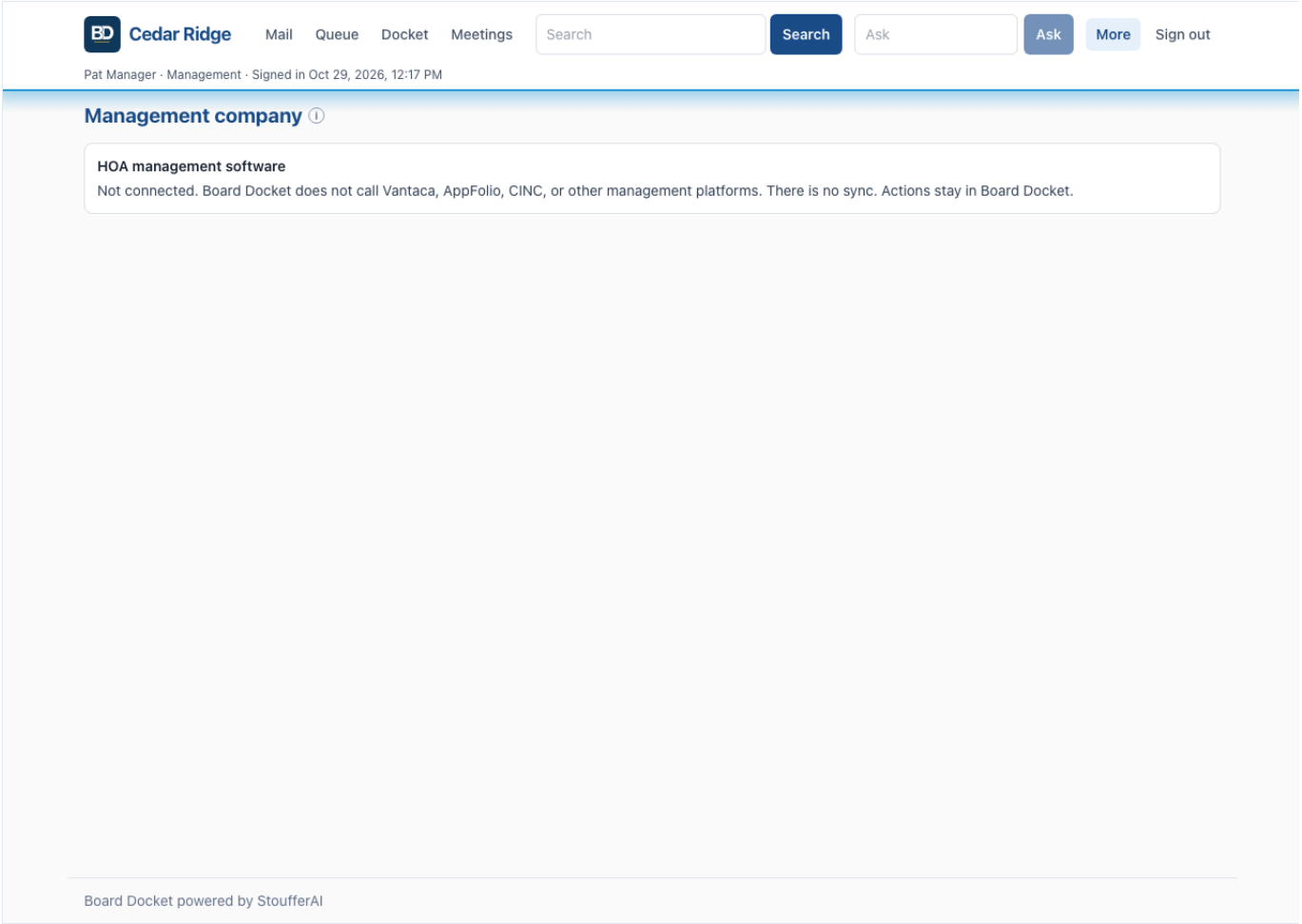
Branding

Name, logo, support email, color. When association hosts are on, `https://your-slug.boarddocket.com` opens only this HOA.



Management engagement

Start or end the management company. Ending **immediately revokes** management access and keeps all records. The HOA's Stripe customer does not move to the firm.

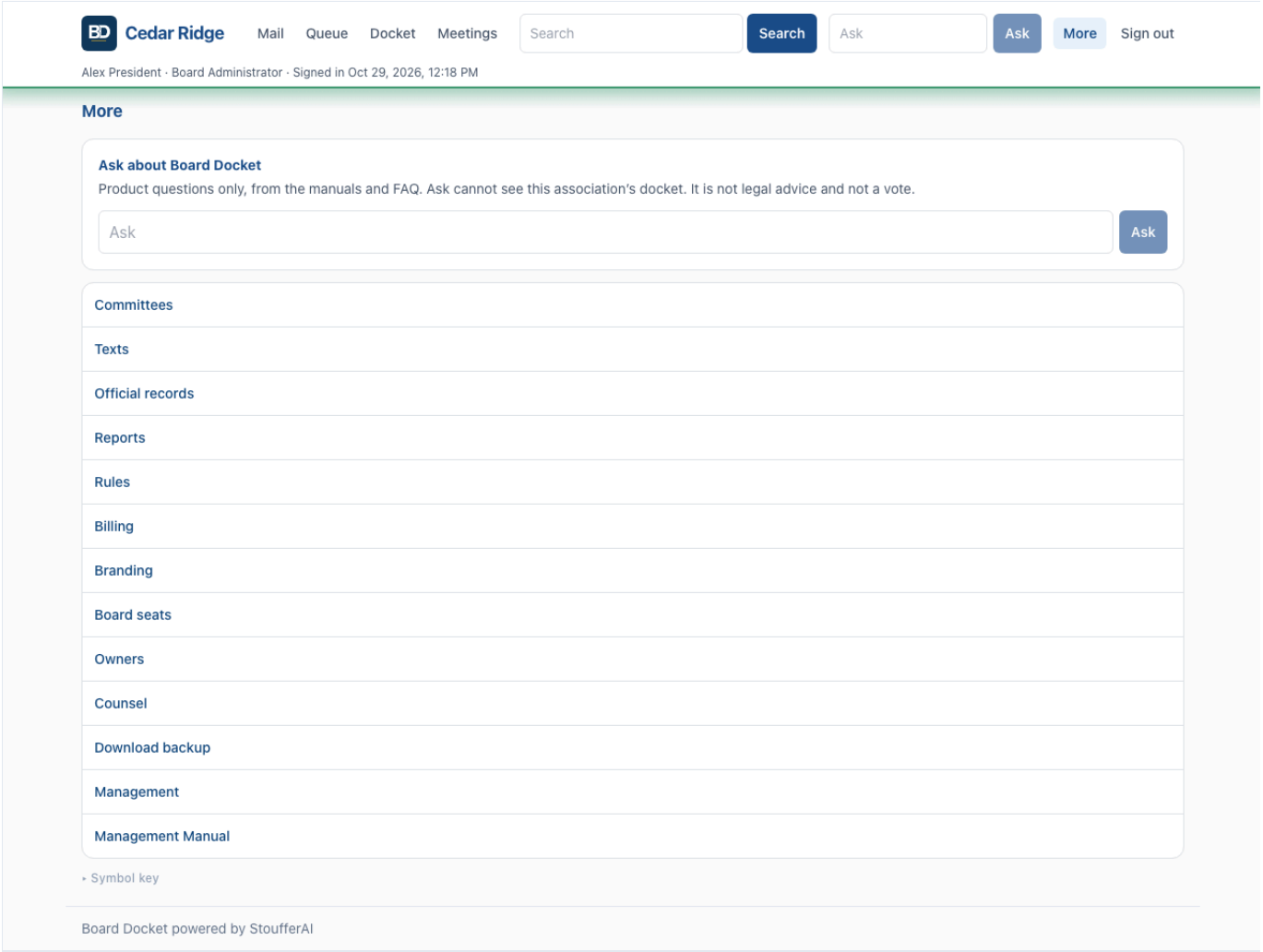


Billing

The association is the Stripe customer. Pay in the Customer Portal. After the 14-day trial, unpaid HOAs cannot **distribute** new items. Existing items stay open. A firm may pay as agent; they still do not own the data.

Download backup

More → Download backup whenever you want (daily, after a meeting, before a manager change). ZIP contains `records.json` plus a `files/` folder of every uploaded document. The download is logged. Storage keys and Stripe ids are not in the file.



13. Quick workflow

Step	Who	What
1	Management	Draft → documents → Submit → Distribute (Type does not auto-roster except meeting-required / emergency). Or **Delete draft** if it should not go forward
2	Directors	Review / Ready / discussion / reply. Posts cannot be withdrawn.
3	Management	Answer questions (amber mark); add to a meeting if needed
4	After noticed meeting	Record **Adopted** / **Not adopted**
5	Staff	Fulfill an outside written inspection from Official Records Inspection

Step	Who	What
6	Board Administrator	Backup ZIP on a schedule you choose

What Board Docket is not

Not work-order or accounting software. No binding electronic board vote. No Approve / Reject on item responses. Silence is never Ready. No sync with Vantaca / AppFolio / CINC. No executive-session chat and no automatic privilege determination. Closed session is a noticed-meeting agenda section with a restricted packet and a named roster.

Need help?

- Deploy: DEPLOY.md
- Product rules: PRODUCT_SPEC.md
- Support: the association support email

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