

Your Town Website — Clerk Quick-Reference Sheet

The eight everyday jobs, step by step — same names as the tabs on the training page. Keep this by the computer at Town Hall.

Getting started — sign in

1. **Phone:** tap **Menu** at the top of the website, then tap **Staff Admin**.
2. **Computer:** add **#admin** to the end of the website address.
3. Type your **admin token**, then tap **Sign in**.
4. Keep the token private — it is the key to your website.

Post an announcement

1. Staff Admin → **Announcements**.
2. Type a **title** and a short **message**.
3. Tap **Post announcement** — it appears on the home page right away.
4. Made a mistake? Use the **Delete** button beside it in the list.

Update the calendar

1. Staff Admin → **Pending Event Submissions**. Read it over — date, place, who sent it.
2. **Approve** → it goes on the public calendar.
3. **Reject** → it never appears. Nothing posts without your OK.
4. **Add your own event:** on the **Events** page, fill in **Submit an Event** → **Submit for approval**.
5. Then approve it in Staff Admin, the same way.

Add a picture

1. Staff Admin → **Site Photos** (near the bottom).
2. Find the photo spot: main photo, water tower, Main Street, school, Town Hall, or historic photo.
3. Under it, tap **Choose File** and pick a photo from your phone or computer.
4. It is resized automatically and is **live right away**.

Change a photo

1. Staff Admin → **Site Photos**.
2. Find the photo you want to swap — the current picture is shown on screen.
3. Tap **Choose File** under it and pick the new photo — it takes the old one's place right away.
4. Changed your mind? **Use default** brings back the original photo.

Add a document

1. The document needs a **web link** first — if it doesn't have one yet, call CrossTrade and they'll set it up.
2. Staff Admin → **Documents**. Type the **title**, pick the **category**, add the **date**, and paste the **link** (the box labeled "File URL").
3. Tap **Add document** — it shows on the Records page right away.

Add a water bill

1. **One bill:** fill in account number, customer name, amount due, due date → **Add bill**.
2. **Whole month:** export the register file from your billing software.
3. Choose the file under **Bulk import** → **Preview import**.
4. Check the counts (new / updated) → **Commit import**.
5. Bills already on file are **updated in place** — never duplicated.

Check service requests

1. Staff Admin → **Service Requests**.
2. Each report arrives with a **tracking code** — residents can check their status with it.
3. Set the **status**: Received, In Progress, Done, or Closed.
4. Add a **staff note** (like "Crew dispatched") → **Save**.

Also in Staff Admin: form submissions from residents, the local directory, town alerts (text & email), due-date reminders, and payments received — they all work the same way: read the list, fill the form, tap the button.

The simple rule: if it's on a Staff Admin screen, it's yours to run.

Anything beyond that — the website address itself, payment setup, or anything that looks broken — is CrossTrade's job. **Call CrossTrade Contracting;** they maintain the backend so you can take care of your town.