

2016

Quick guide to use



This document is a step by step manual to use MemberPortal



Introduction

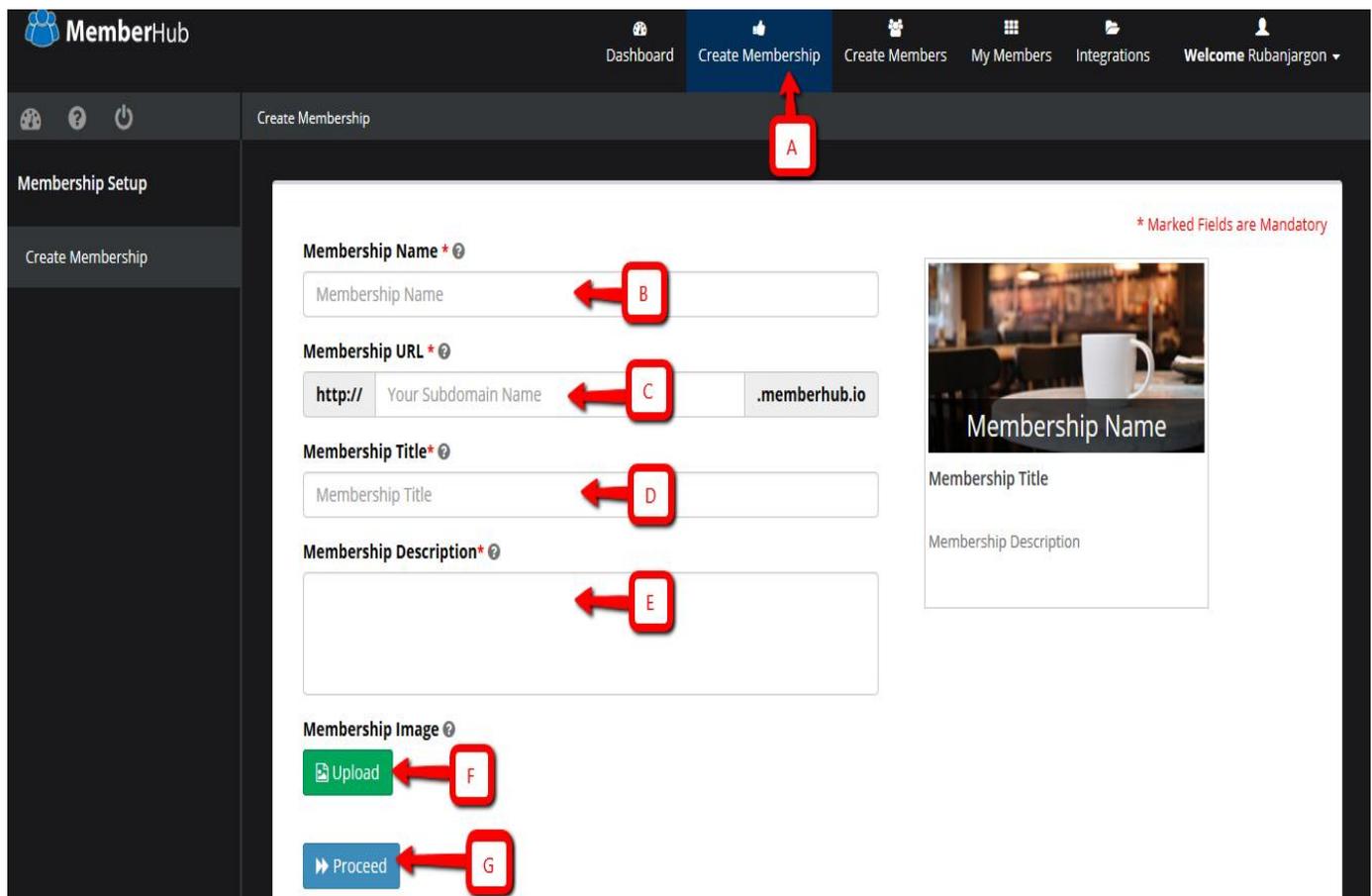
MemberPortal is a tool that lets you to build your membership site and manage your members. It will help you to create modules instantly with our video importer and also you can shuffle your modules and lessons in any order and deploy.

This newly upgraded membership software is the only solution that is build to satisfy the needs of your members in a very user friendly way.

“Please follow these 6 simple steps to create your own membership site”

Create Membership

Before you start customizing your membership site, fill in the basic details

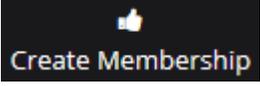


The screenshot shows the 'Create Membership' form in the MemberHub interface. The form is titled 'Create Membership' and is located in the 'Membership Setup' section. The form contains the following fields and buttons:

- Membership Name ***: A text input field with a red callout 'B' pointing to it.
- Membership URL ***: A text input field with a red callout 'C' pointing to it. The field contains 'http:// Your Subdomain Name .memberhub.io'.
- Membership Title ***: A text input field with a red callout 'D' pointing to it.
- Membership Description ***: A text area with a red callout 'E' pointing to it.
- Membership Image**: A section with an 'Upload' button (green) and a red callout 'F' pointing to it.
- Proceed**: A blue button with a right arrow and a red callout 'G' pointing to it.

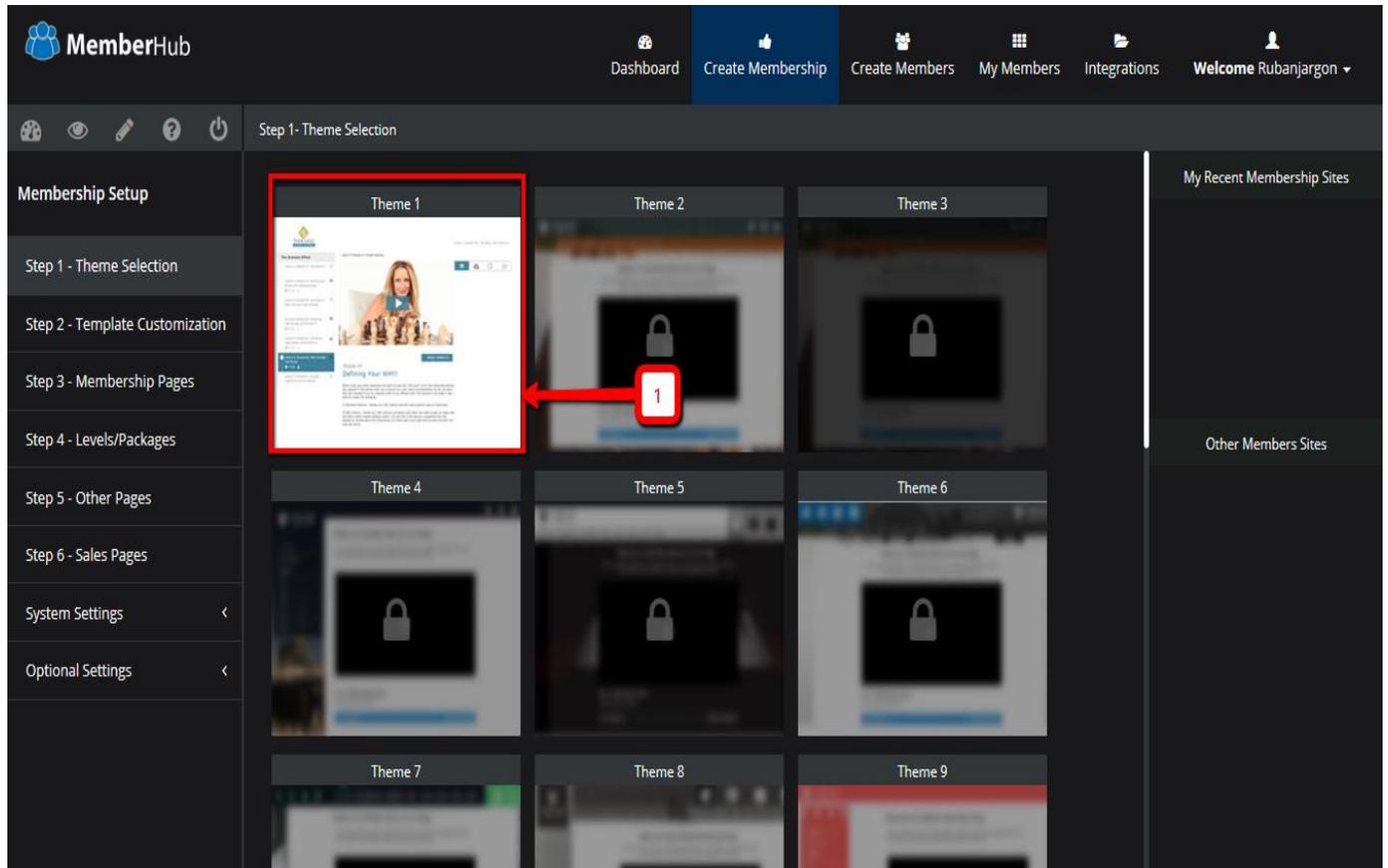
A red callout 'A' points to the 'Create Membership' button in the top navigation bar. A red asterisk note at the top right of the form states: '* Marked Fields are Mandatory'. A preview of the membership site is shown on the right side of the form, featuring a background image of a coffee shop and the text 'Membership Name' and 'Membership Description'.

Create Membership

- A: Click on the  button to create your membership site.
- B: Enter your membership name for your membership site and your membership name should be minimum of 4 letters. It is the primary name of the site for you and your customer to distinguish from one site to another site.
- C: Enter your subdomain name that you want your customers to visit and your subdomain name should be minimum of 3 letters.
- D: Enter your membership title.
- E: Enter your membership description.
- F: Upload your membership image and it will help you to distinguish from one site to the other membership site in your dashboard.
- G: Click on the  button to continue.

“This option will take you to the Theme selection –Step1”

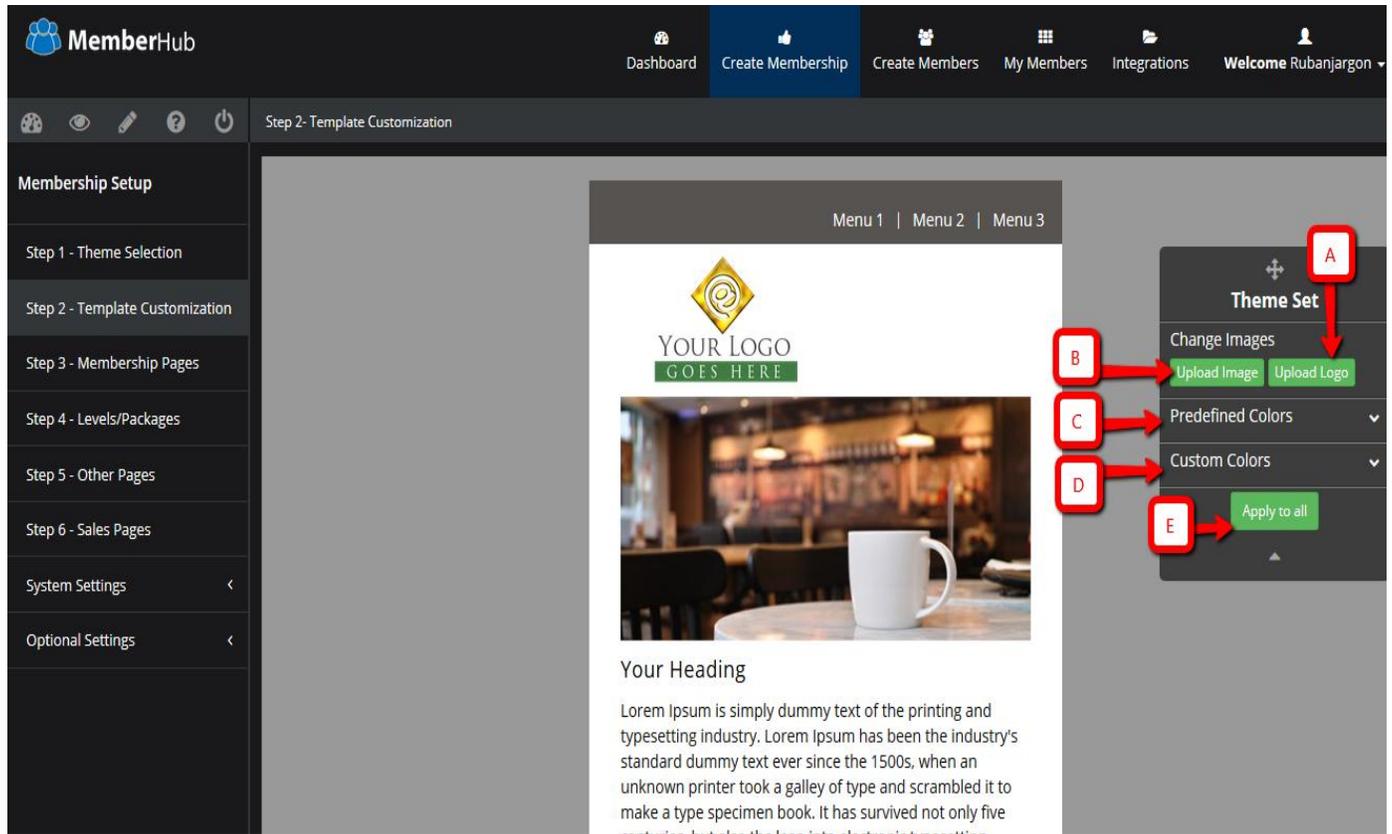
Step1- Theme Selection



Step1: Choose your preferred theme for your membership site.

“This step will lead you to Template customization- Step2”

Step2- Template Customization



A: Click on the **Upload Logo** button to upload your logo. This logo will show up in all your membership site pages.

B: Click on the **Upload Image** button to upload your login screen background image.

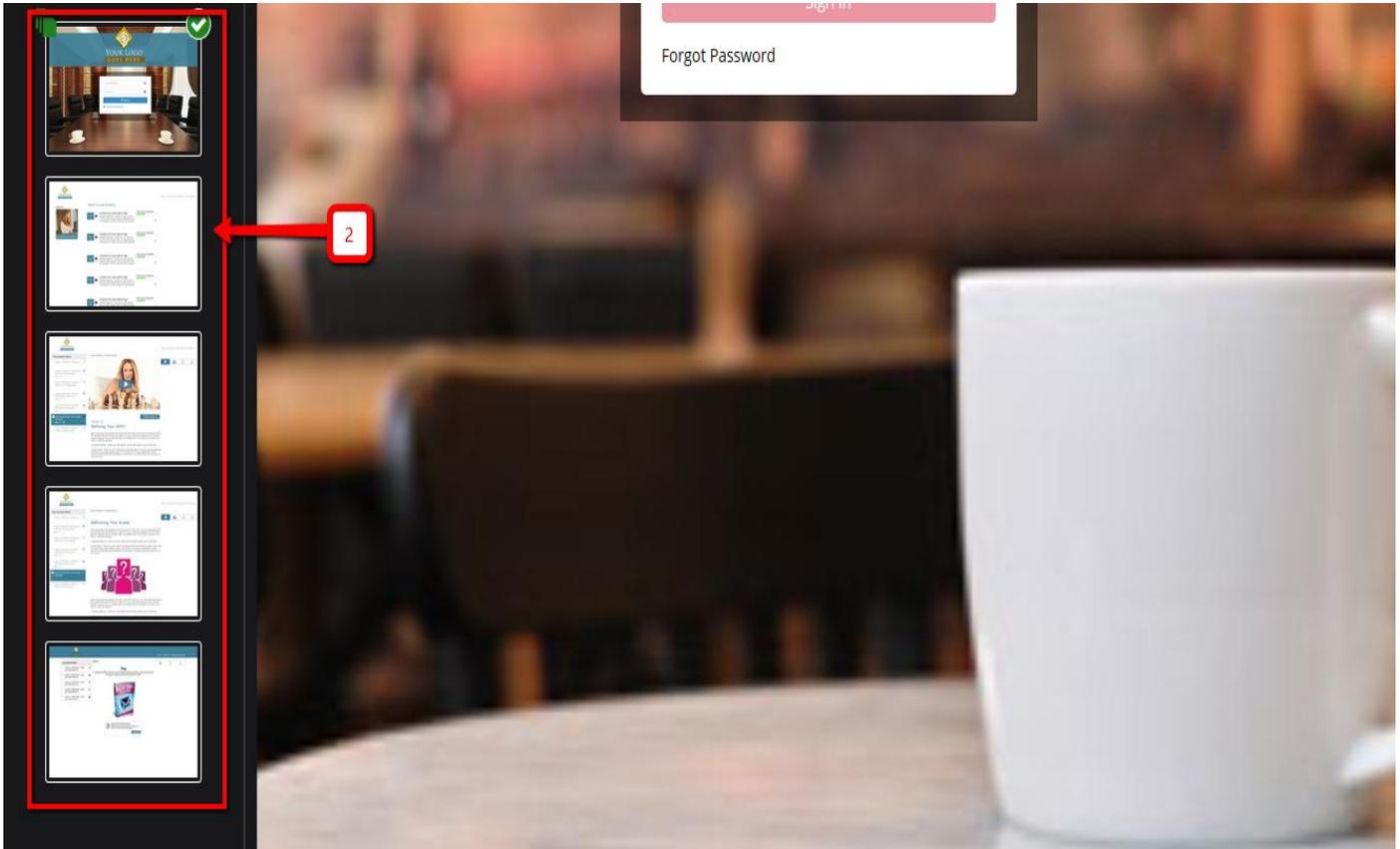
C: Predefined colors will help you to set the predefined color combination for your templates.

D: Custom colors will help to set the custom colors for your template.

E: After the changes done click on **Apply to all** button to save changes.

“This option will lead you to the entire Template customization pages”

Step2- Template Customization

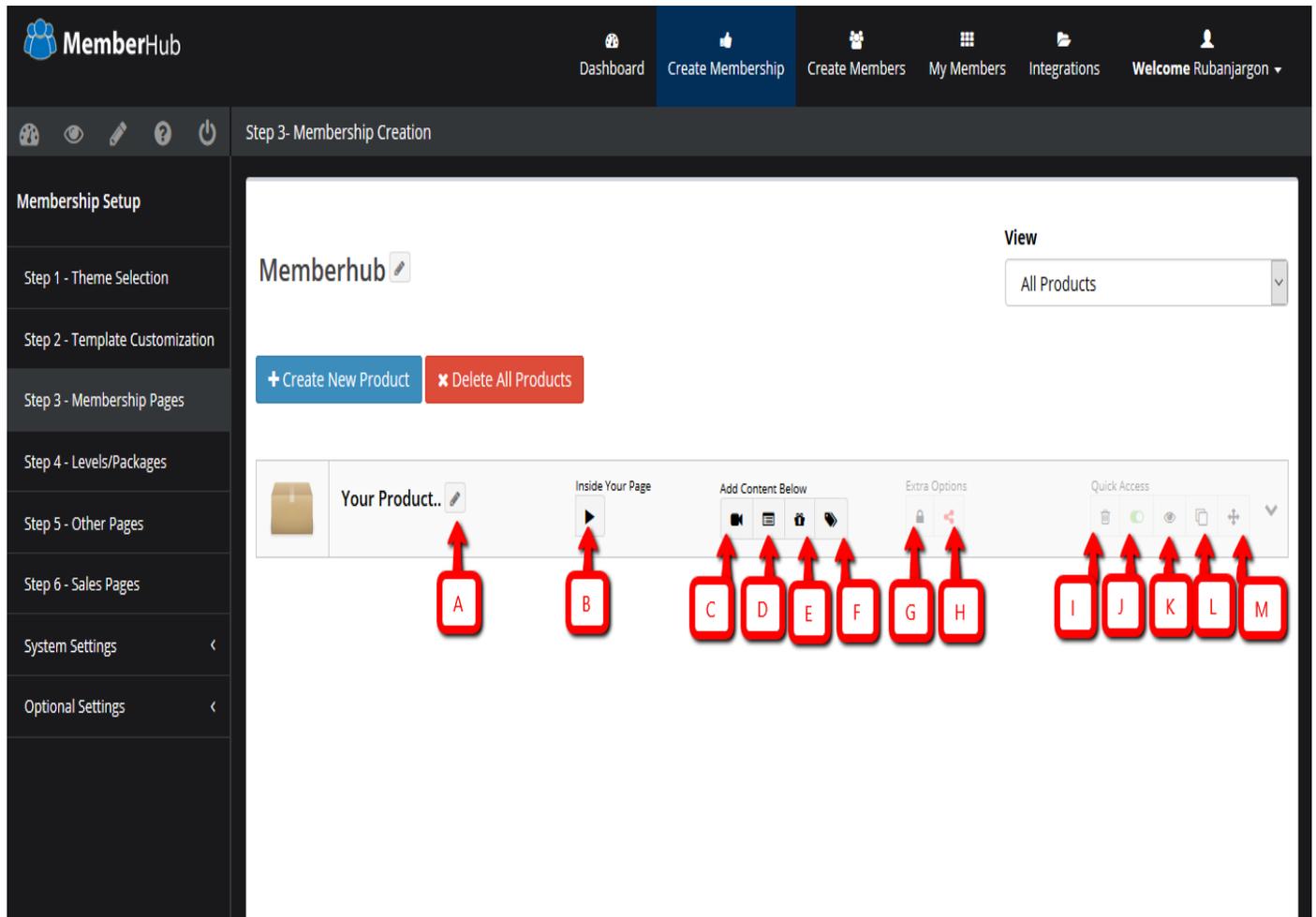


Step2: You can customize all the pages and module layouts here.

**“After customizing all the pages with your
Preferred pattern, colors and layout.
Please proceed on to Membership pages - Step3”**

Step3- Membership Pages

The content of your membership site can be added in the membership pages. You can showcase in depth the different product/service offering that you have. You can completely customize this page to suit your need



A: Click the  button to edit the product details in your membership site.

B: Click the  button to add a video inside your product page. You can add introduction video or something which is related to your product.

C: This  option will help you to add video modules to your product.

Step3- Membership Pages

D: This  option will help you to add content modules to your product.

E: Click on the  button to add downloadable modules to your product.

F: This  option will help you to add category module to your product.

G: Click the  button to set levels for your product.

H: This  option will make active and inactive status to the related modules in your product. The related modules like content modules or the category modules to show or hide inside your product page.

I: Click  button to delete the product in your membership site.

J: This  option will help you make your product status as active or inactive.

K: Click on the  button to preview your product page.

M: This  option will help you to drag and drop.

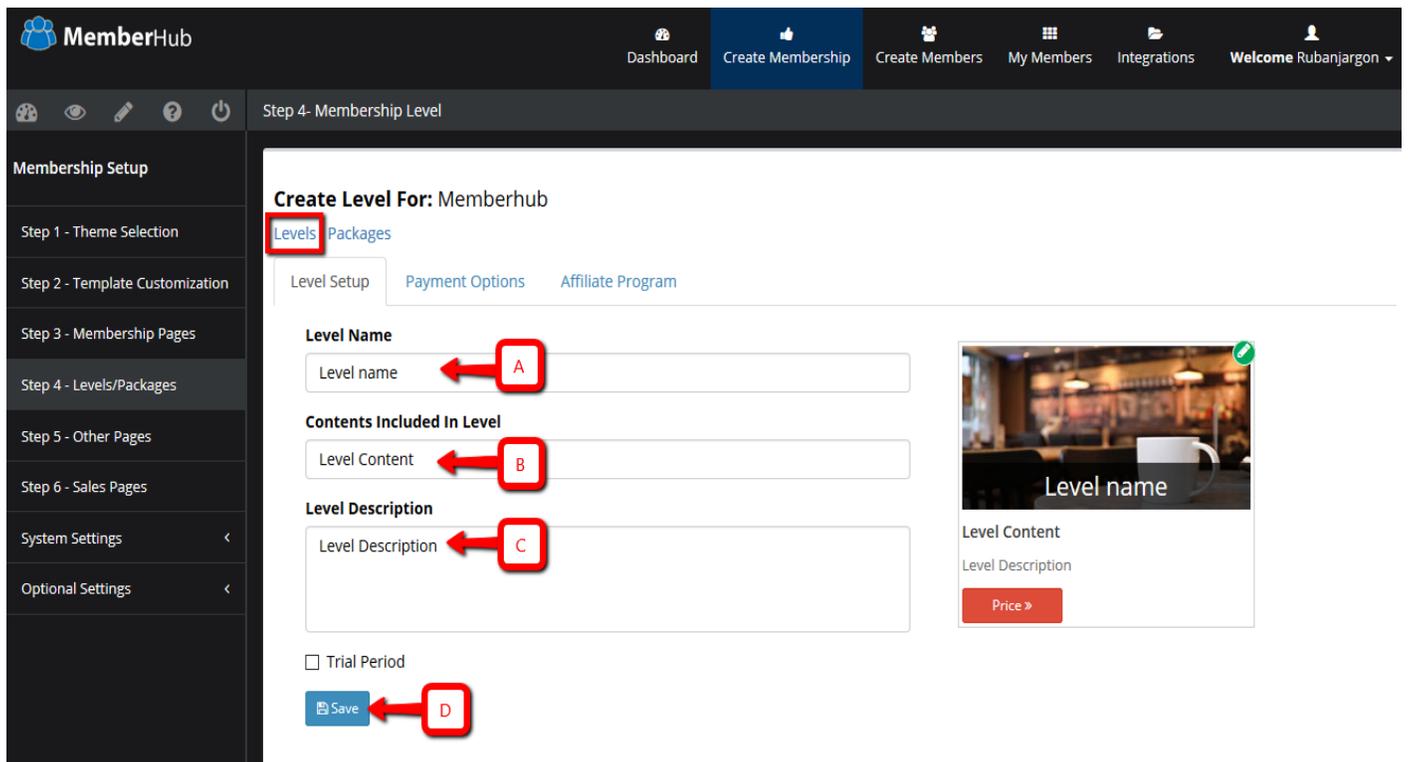
“After creating your products and modules successfully.

Please proceed on to Levels/Packages – Step4”

Step4- Levels/Packages

Levels:

Levels are created for membership site. Levels are the areas where you provide or restrict access to specific products/modules in your membership site. It is an easy way to identify which user gets what access. (E.g.: Silver, Gold and Platinum)



The screenshot displays the 'Create Level For: Memberhub' interface in the MemberHub system. The sidebar on the left lists the 'Membership Setup' steps, with 'Step 4 - Levels/Packages' selected. The main content area has three tabs: 'Level Setup' (active), 'Payment Options', and 'Affiliate Program'. The 'Level Setup' tab contains three input fields: 'Level Name', 'Contents Included In Level', and 'Level Description'. A 'Trial Period' checkbox is located below these fields. A 'Save' button is at the bottom left. A preview of the level card is shown on the right, featuring a background image of a bar and a white mug, with the text 'Level name', 'Level Content', and 'Level Description' overlaid. A red 'Price »' button is at the bottom of the preview. Red boxes and arrows labeled A, B, C, and D point to the 'Level name' input field, the 'Level Content' input field, the 'Level Description' input field, and the 'Save' button respectively.

A: Enter your level name.

B: Enter the contents included in level.

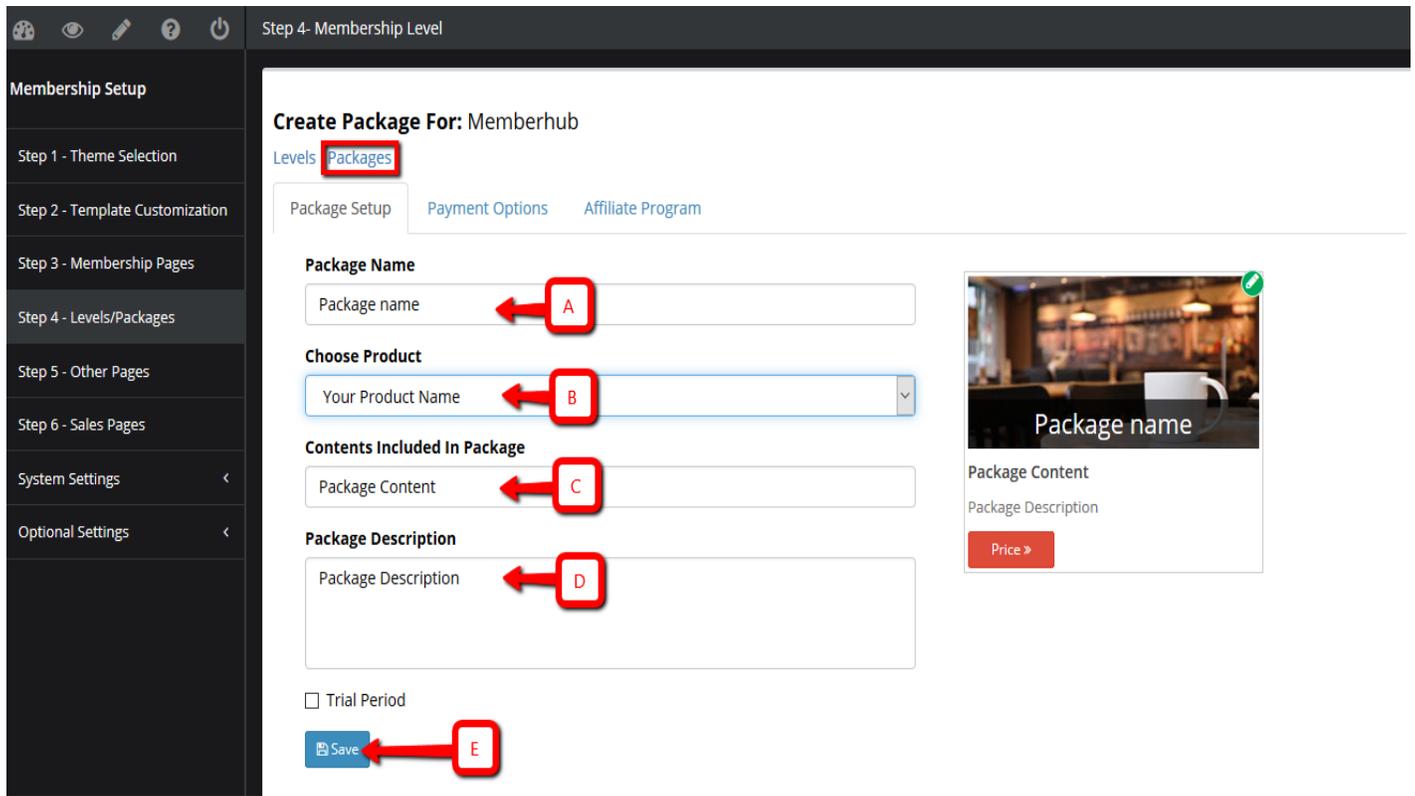
C: Enter the level description.

D: Click on the  button after everything is updated.

Step4- Levels/Packages

Packages:

Packages are created inside the products in your membership site. You can group your offering into packages and assign a monetary value to it which your members will have to pay to use. You can also offer it as a free package if needed.



A: Enter your package name.

B: Select the product name for which you need to set the package.

C: Enter the contents included in the package.

D: Enter the package description.

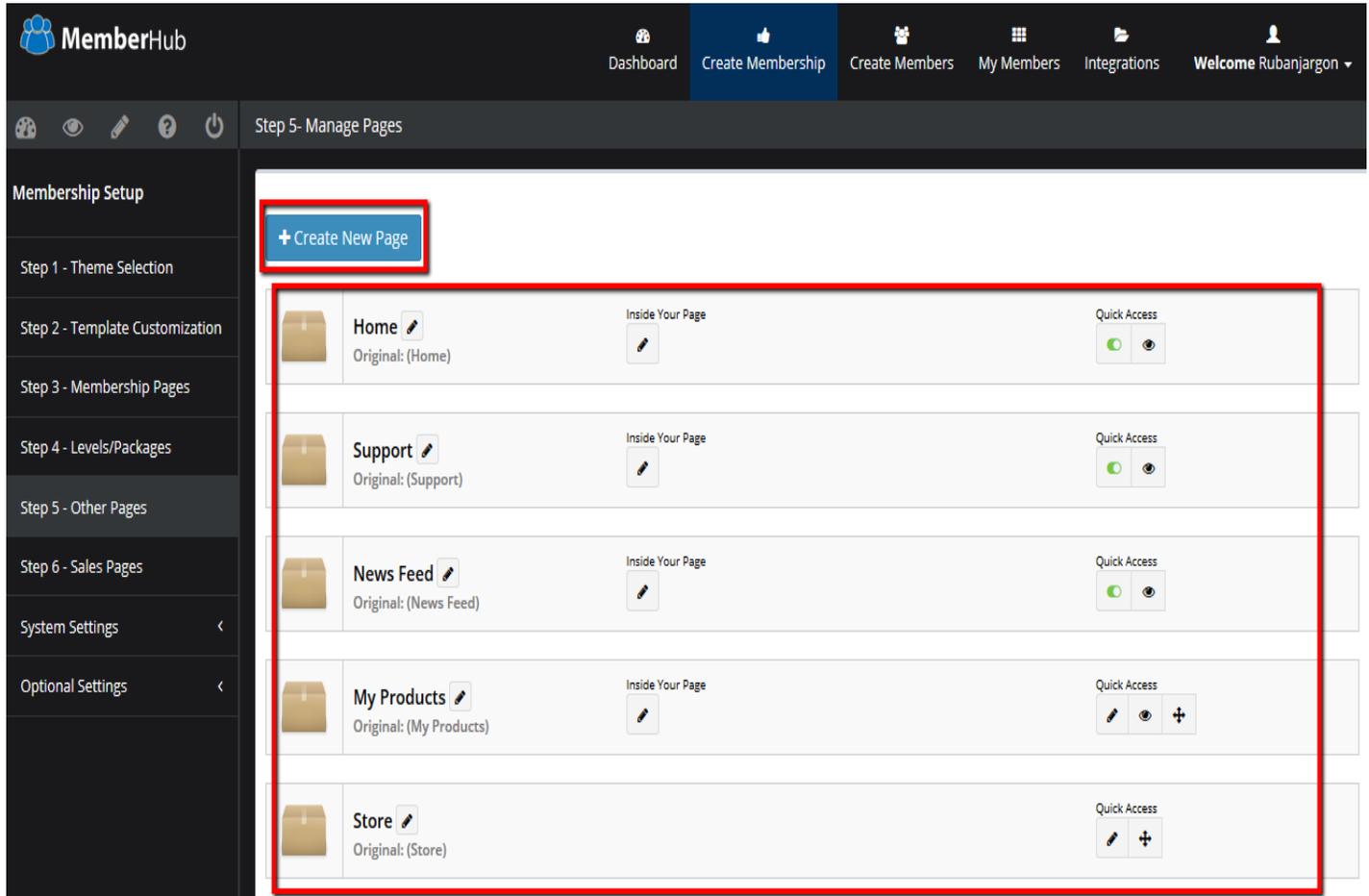
E: Click on the  button after everything is updated.

“After updating the levels and packages successfully.

Please proceed on to Other pages – Step5”

Step5- Other pages

Other pages are a section where you can edit the other page tabs in the members area where your users will login to the membership site.



The screenshot shows the MemberHub interface for Step 5 - Manage Pages. The top navigation bar includes 'Dashboard', 'Create Membership', 'Create Members', 'My Members', 'Integrations', and 'Welcome Rubanjargon'. The left sidebar lists 'Membership Setup' with steps 1 through 6, and 'System Settings' and 'Optional Settings'. The main content area features a '+ Create New Page' button and a list of existing pages: Home, Support, News Feed, My Products, and Store. Each page entry includes an edit icon, 'Inside Your Page' status, and 'Quick Access' controls.

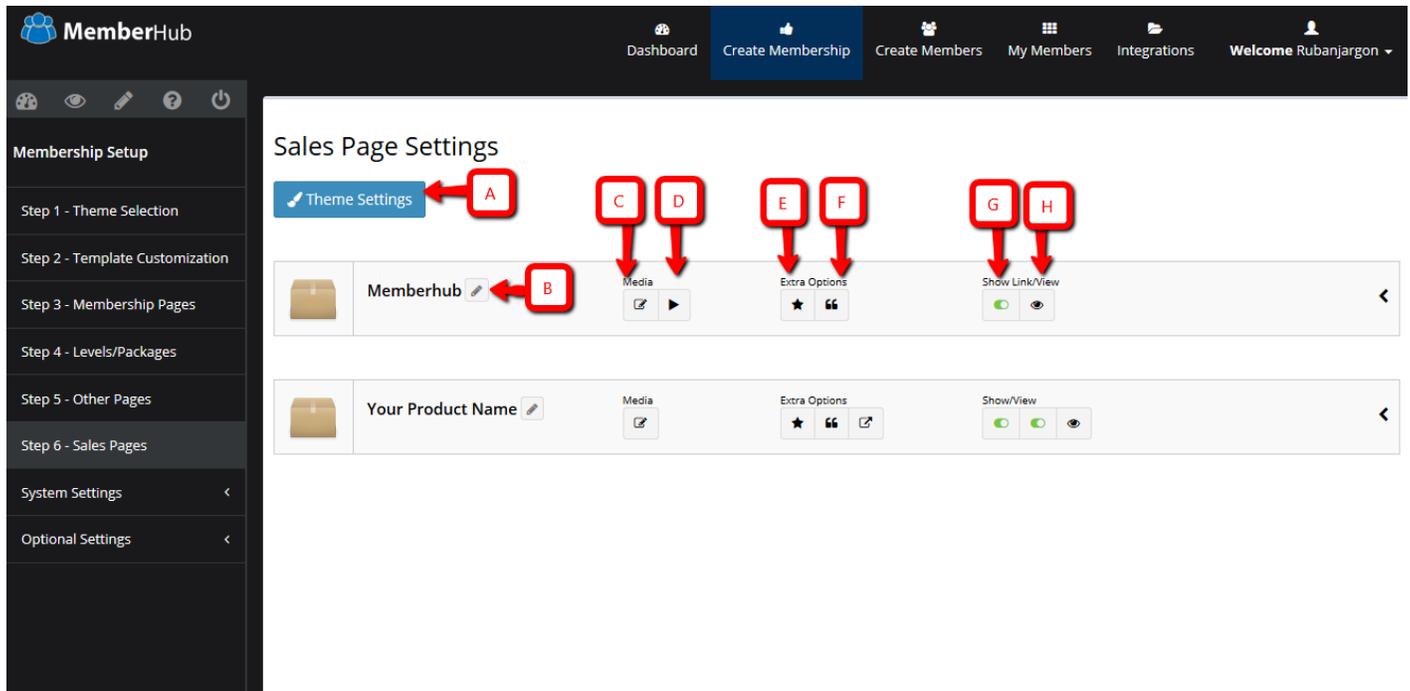
Page Name	Original	Inside Your Page	Quick Access
Home	(Home)	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Support	(Support)	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
News Feed	(News Feed)	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
My Products	(My Products)	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Store	(Store)	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

“After updating the page tabs in the other pages.

Please proceed on to Sales pages- Step6”

Step6- Sales pages

The contents that add in here will be displayed as a unique url. You can use this to display the various offerings available in your membership site.



A: Click on the button to edit the Theme for your membership page and product page.

B: Click on  button to edit your membership details.

C: Click here  to enter long description for your membership site sales page.

D: Click on  option to add video to your membership site sales page.

E: This  option will help you to assign testimonials for your sales page.

F: This  option lets you to add the quoted text inside your sales page.

G: Click on this  button to make your sales page active or inactive status.

H: This  option will help you to preview your sales page.