Step 7: Members Portal Setup

Quick Steps: Members > MemberDesq

1. Within the Management Console, select **Members** from the top menu, then click **Members** from the left hand menu

2. Click Edit, enter relevant information and click **Save**

General

Select which Menu Options display on your Members Portal, and customise the titles of each page. This tab also allows you to select the Theme you would like to use for your Portal. This can be set up in Tools / Themes.

Summary

The Summary will display on the front page of your Members Portal, providing members information about your membership offerings before they register or renew.

Welcome

The Welcome displays on the Members Home page (accessed once a member has logged into the MembersPortal). "Dear MEMBERFIRSTNAME" will automatically appear on every Members Home page.

Account Info

The text entered in Account Info will display against an unpaid transaction on the Members Home page. Where Account Info is left blank, the following message will appear "Outstanding accounts exist. Click here to view and pay".

* This information box will only appear if the member has an unpaid subscription attached to their account

Design

The Design tab allows you to customise the font and background colours of the Membership Portal.

Use hex colour codes to input the colour selection for each area. Please click here for a list of colour codes.

Images

The Images tab allows you to upload background and logo images for your page. The dimensions for your images should be as follows:

Site Background:

1280px wide by 1024 high (min),

3000px wide by 1500px (max)

Registration Confirmation

The Registration Confirmation text displays on the confirmation page following the competition of a registration/renewal

Adding a Custom Page to a Members Portal

1. Within the Management Console, select **Tools** from the top menu, then click **User Defined Data** from the left hand menu

2. Select **Category** from the expanded left hand menu and click **Add**

For a standard web page, select Menu Option with Custom Data.

3. Select the applicable page options click **Next**

4. Enter the relevant information for the new page, ensuring the Menu Included is set to All or Members Portal Only. Click **Save.**

5. Click on the red cross (status) to turn the page online.