

PORTAL/APP SETUP

Make changes to your Member Portal setup so its button-driven, streamlined interface includes only the feature buttons you want it to present. Rename and reorganize the buttons, add headlines and introductory page descriptions for the content each one brings up, and hide any buttons that you do not wish to display.

- ◆ **Note that the changes you make to the Member Portal setup also apply to the Member Dashboard (“My Dashboard”). However, these changes DO NOT apply to the Admin Dashboard.**

To change Member Portal Settings, open the “Manage Site” tab and click on the “Portal/App Setup” tab.

Customize the welcome text from the “MEMBER PORTAL SETTINGS” window. This message will appear on the Member Portal when your members load this feature. It also will appear on the home screen of the mobile app.

- ◆ **Note that if you do not enter a custom message or delete the default text, the default text (“Please enter your welcome text”) will appear.**

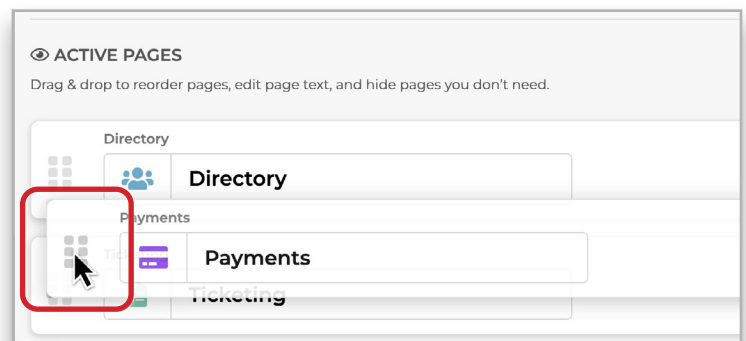
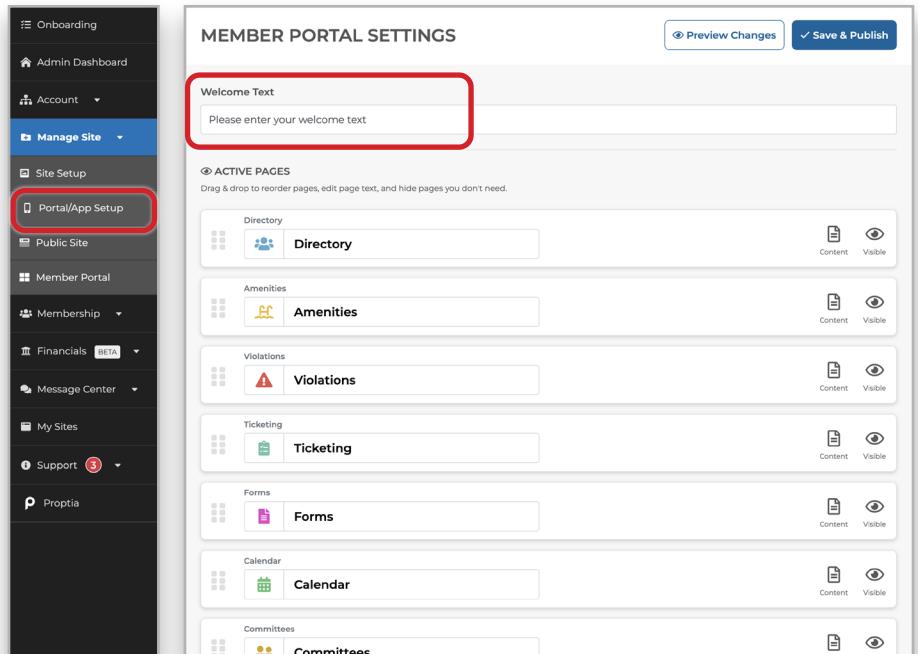
Drag an individual feature row up or down to change the order in which the Member Portal feature buttons, mobile app buttons, and Member Dashboard cards appear.

- ◆ **The top-to-bottom order of the feature rows equals the left-to-right order of the Member Portal and mobile app buttons, and the equivalent order of the Member Dashboard cards.**

To hide a feature that your community may not need, simply click on the “Visible” icon (eyeball).

- ◆ **A hidden feature immediately moves to the “INACTIVE PAGES” list at the bottom of the “MEMBER PORTAL SETTINGS” window.**

To reactivate access to a feature on the Member Portal, mobile app, and Member Dashboard, locate it in the list of “INACTIVE PAGES” below the list of “ACTIVE PAGES.” Click on the “Hidden” icon (eyeball with a diagonal line through it) to reactivate the item. It immediately moves to the bottom of the “ACTIVE PAGES” list at the top of the window.



PORTAL/APP SETUP—CONTINUED

After you customize Member Portal features, click on the “Preview Changes” button at the top right of the window to see your results. Click on the tabs at the top of the preview window to see desktop and mobile views of the Member Portal. Click on the “X” at the top right of the preview window to close it.

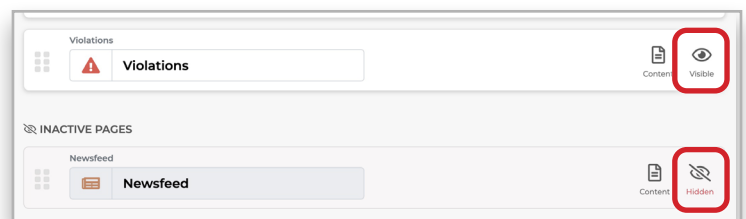
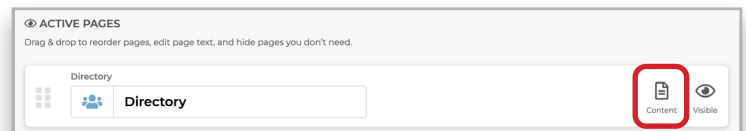
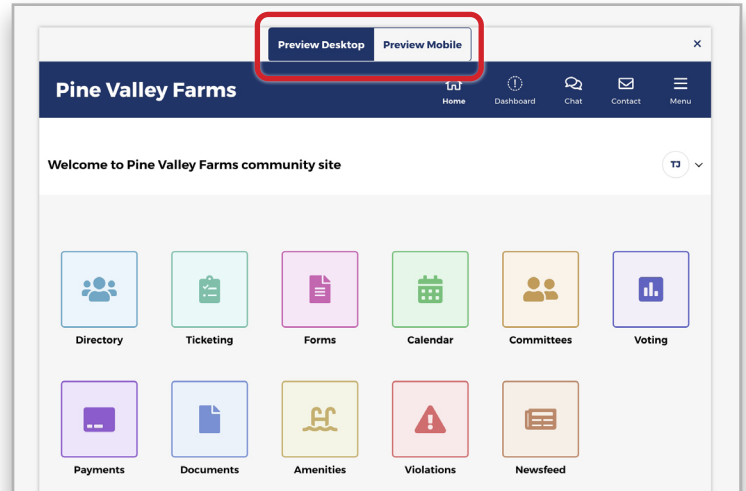
To add optional descriptions of each Member Portal feature so they appear on the pages that open from the Member Portal or mobile app buttons, click on the “Content” icon (page) to open the “DIRECTORY CONTENT” window.

◆ **Note that these optional pieces of descriptive text will appear only on the pages you open from the Member Portal or mobile app, not on the Member Dashboard.**

In the “DIRECTORY CONTENT” window, activate the “Show page headline (optional)” checkbox to reveal the “Title” box. Enter up to 25 characters in this box to create a headline for the Member Portal/mobile app feature page.

In the “DIRECTORY CONTENT” window, activate the “Show page description (optional)” checkbox to reveal the “Description” box. Enter up to 250 characters in this box to create a description of the Member Portal/mobile app feature page.

When you are happy with your changes, click on the “Save & Publish” button at the top right of the “Member Portal Settings” window. Otherwise, your changes will not be preserved.



DIRECTORY CONTENT

This optional content displays at the top of the page.

☒ Show page headline (optional)

Pine Valley Farms Members

limited to 25 characters

☒ Show page description (optional)

Members can opt in to share some or all of their personal contact information in the online Member Directory, or choose to share no information. Edit these sharing settings in "My Profile."

limited to 250 characters

Save

Cancel



If you have additional questions about Portal/App setup, please visit the Support Desk through your Admin Dashboard and open a support ticket.