

## VENUESERVE FITNESS USER GUIDE

# HOW DO I SET UP MEMBERSHIP LEVELS

1. To set up membership levels navigate to the Membership section from your admin dashboard.
2. Select Settings. This is where you will find the membership options known as Levels. To edit an existing membership level, hover over the name and you will see additional options. Click edit to amend the level.
3. You can amend the cost of membership and the categories associated with that membership level. When you have finished making your amends click Save Level to update.
4. To add a new membership level click Add New Level and complete the relevant fields.
5. Billing Details - you can set a cost and set the billing amount to be paid. You can set the payments to be recurring and the cycle to be on a daily, weekly, monthly or annual basis Other Settings - you can also set a timescale for the membership level to last by checking the Membership Expiration option. Further fields will appear so that you can set the timescale in either days, weeks, months or years for expiration.
6. You can also set whether the membership is visible on the platform for members to select.
7. You cannot set a free billing period for a length of time that is different to the billing cycle. What this means is that you cannot currently have a one-week trial period, followed by a monthly charged billing frequency, within the same membership level. You must create two levels, a week free trial level, then a monthly membership option.
8. Once a week's free trial is up, the user will be sent an email to prompt them to sign up to another level.

## MANAGING MEMBERSHIPS

1. From the dashboard select Membership. This will take you to your Membership Dashboard where you will see details of relating to the revenue from your members that are paying for subscription.
2. Details relating to the number of visits and views, as well as the number of sign ups and cancellations.
3. Under the Members tab you can view those who have signed up to your platform.
4. Under the Orders tab you can view details of subscriptions.
5. Under the Reports tab you can view the number of visits, views and sign ups.
6. Under the Settings tab you can add and manage your membership levels.

## HOW DO I UPLOAD MEMBERS CSV

1. Do not attempt to upload members via CSV until you have accepted the change of admin email address.
2. From the dashboard of your platform, you need to download the CSV template to ensure you enter the information from your membership database in the correct format. You will also need to know the ID number of the particular membership level that you are wanting to add your database to. This can be found under Membership -> Settings. The ID is the number in the column next to the name of the level.
3. The fields can then be filled out as follows:
  - User\_login: This is a required field, and must not contain any spaces
  - User\_email: Required field
  - User\_password: This field is not required, the system will automatically email the user and ask them to set their own password.
  - First\_name: Not required
  - Last\_name: Not required
  - Role: This must be set to subscriber
  - Joined: Not required
  - Expires: Set as 'never' to continue indefinitely
  - Membership\_id: This is a required field and should be set to the id number the membership level to which you want to assign this member.
4. Once you have prepared your CSV file, you can upload to the platform.
5. Navigate to Users and select the Import from CSV. From here you can browse to your CSV in preparation to upload and then check the options if required prior to uploading. Click Import to complete the process.

## WHATS THE DIFFERENCE BETWEEN MEMBERS AND USERS

1. Users cover everyone that is signed up to the system including Admins as well as all members. Under Users you can change a user's role. Subscribers only have access to the front end (the website) of your platform, and a smaller version of the back end that allows them to change passwords or their profile settings only. Setting a user's role to any other role will provide them with other backend access tools that they should not be granted access to.
2. Members also show all those registered to your platform whether they are administrators or subscribers, but here you can filter via the dropdown to specific membership levels.