Settings Module

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# Overview

The settings module is where you can manage admin user permissions, referring agents, services, memberships, additional offerings, [email communications](https://docs.google.com/document/u/0/d/1pp_sYzQY_o2gmPv0PV_LI8JqIduXR5O5ssgHtlAwbtk/edit), and more. Your clients may be charged based on subscription basis using membership/additional offering and members may request for specific services.

## Manage admin settings

Manage your profile information like business/support contact information, referring agent information and admin permissions in the portal using this module.

Manage services

Manage the services you offer from the settings module. User membership offerings to manage your client membership options, ancilliary offering for custom offerings and settings > services for specific services.

# How To

1. [View/edit tenant’s (your organization) contact information](#n5klx5gmho72)
2. [Manage referring agents](#maknmqgkymcg)
3. [Manage client leads status](#birkkootgiu0)
4. [Manage admin permission within the portal](#k1a3lvp8v338)
5. [Manage services](#xxxi7zqao3e5)
6. [Manage membership offerings](#9upiorl3vps9)
7. [Manage custom/ancilliary offerings](#7emo8n6ar1vc)
8. [Manage email templates](#x0gr42jm0qfg)

To modify tenant contact information go to Settings >Profile >Profile tab

To modify primary contact and support contact information go to Settings>Profile>Contacts.

Click on Settings>Referrals and commission to:

* Add a referring agent, click on +Add on the top right side of the page and fill out agent information including agent status from dropdown ( New, Active or Inactive) then click Save.
* Click on the ellipses on the far right of each agent name to Edit, Delete, Get Link (Shareable referral link for that agent), Send Invite to create portal account.

Click on Settings>Profile>Profile>Status tab to:

* To add a [lead](https://docs.google.com/document/u/0/d/1qKza7A7y-hv9znclOjqHT39JNrIfJxq6IC74v1pw6uA/edit) status, use the +Add button on the top right
* To edit or delete existing lead status, use the ellipses on the far right of the status.

You can manage admin portal access permissions. Go to the Settings>Admins:

* Use the +Add on the top right side of the page to add Admin.
* Click on the ellipses on the right side of each Admin to edit information, set/edit permission (check or uncheck to edit access to modules then click save), delete or send invite (option only shown if account not created).

Go to Settings>Profile >Services to view tenant services offered to members

* To add a service click on +Add on the top right side of the page, fill out the information and click Save
* To edit or delete a service click on the ellipses on the far right of the service.

Go to Settings >Membership Offerings tab.

Click on +Add on the top right side of the page to add a Membership type:

* Choose Category: Individual & Family OR Company & Group
* Choose Age range and Quantity (min and max number of members if any) can be set by typing manually or using the arrow buttons on the right hand side.
* Set Price.
* Set Billing Interval from dropdown: Bi-yearly, Monthly, One Time, Quarterly, Yearly.
* Set Billing Type from dropdown:
* By Family
* Group: all members in a group pay together
* Individual: each individual in group charged separately
* Add Registration Fee: One time registration fee
* Choose Visibility from dropdown:
* Public: Shown on the public site and can be chosen as an option by anyone.
* Private: Can only be chosen as an option by admin.
* Choose Status:
* Active: Can be chosen as an option
* Inactive: Cannot be chosen as an option
* Add Start and End Date.
* To filter Offerings, use the search bar to filter by name or click on the arrows beside Name, Price and Visibility to arrange in ascending/descending order.
* To edit or delete an offering click on the ellipses on the far right of the offering.

To view custom offerings and their prices click on Settings >Ancillary Offerings.

* To add an offering click on the +Add on the top right side of the page and fill out the information including Offering Name, Price, Interval for Members and Non-Members, Visibility (Public or Private) , Start and End Date then click Save.
* To filter Offerings, use the search bar to filter by name or click on the arrows beside Name, Non-Member Price, Member Price and Visibility to arrange in ascending/descending order.
* To edit or delete an offering click on the ellipses on the far right of the offering.

To view communication templates click on Settings>Comms Templates.

* Click on +Add Email Template button on the top right corner to add pre-defined templates and click Save Changes.
* To edit template content click on the default templates from the list, type Subject then type email content using the metadata buttons on the bottom of the page, click Save or to publish click Publish/Unpublish button on the top right.

\*NOTE: To make sure clients are receiving [email](https://docs.google.com/document/u/0/d/1pp_sYzQY_o2gmPv0PV_LI8JqIduXR5O5ssgHtlAwbtk/edit) check the publication status on the top left corner beside the template name shown as gray box.

* To delete a template click on the trash icon in the top right of the template box.