Trybz - Admin Manual

Current as at February 2021

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Contents

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Welcome

This Admin Manual has been designed to provide you with a practical approach to setting up your Community and exploring the best practices as your organisation starts to build and grow your community.

What is a Branded Online Community?

A branded online community (like yours) is a professional network that brings your members, suppliers and sponsors together to start conversations and nurture relationships.

Your community will play a huge part in your customer journey and member experience. They break down the traditional one-way exchange of information & open lines of communication to deliver increased value.

Branded Online Communities in Practice

The future of work is definitively hybrid and remote, which requires leaders to build community leadership and management skills across platforms, pronto.

And if your industry is going to be an integral part of their lives, that means having the ability to connect them with people in your industry via their portable office.

Once community members log in for the first time, you will want to engage them in a variety of ways, like:

- Ask the community a question member.
- Read top discussion posts from the week.
- Read a resource or look for a template.
- Register to attend an event.

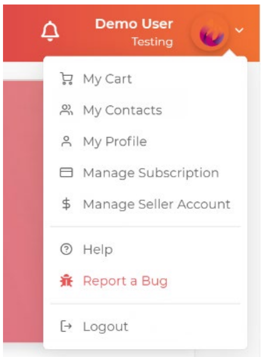
Your online community is about creating a destination for real people. Your community can serve as the virtual town hall for your organisation, or provide recognition, support, and connection when your customers or members need it the most.

Time to get started!

Your Profile

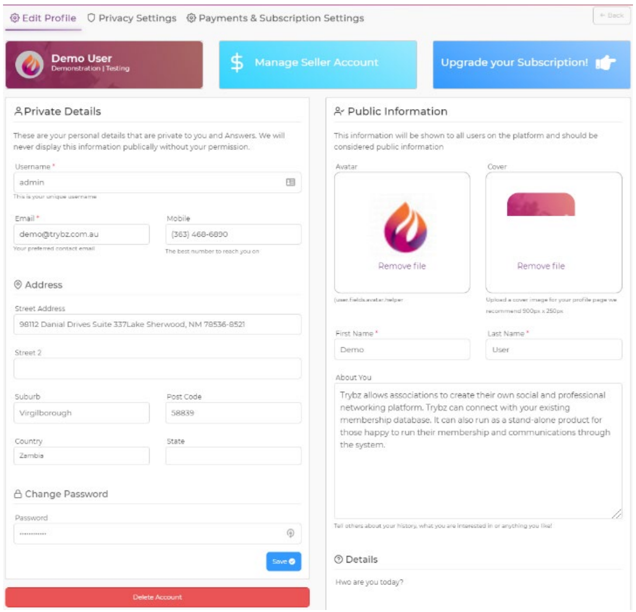
Now that you have created your user account, it is time to add more detail to your profile.

To do this, click on your avatar icon in the top right of the screen and select **Edit Profile** from the dropdown menu.



Edit Profile – User View

On the Edit Profile screen, you can update both your public and private information. The private information consists of your login details and other personal contact details required to manage your account. These cannot be seen by anyone but the user.



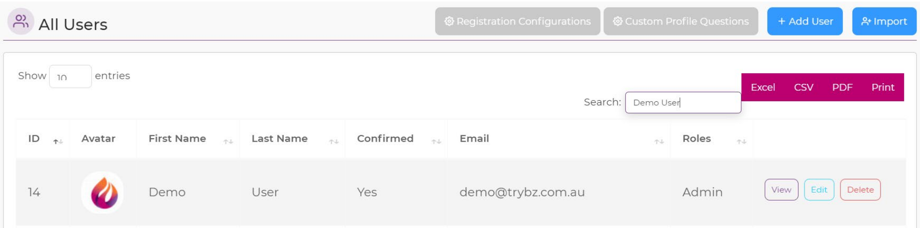
The Public Information panel contains the settings for your public profile on the platform and allows you to update the details that other users can see about you, including custom profile questions.

From this screen a user has the ability to update any of these fields, and it is important that Admin provide prompts for a user to do so, particularly if they are moving around in the sector.

Edit Profile – Admin View

An administrator can access a user's profile by logging into the administration area by clicking on **Admin** in the services panel, select **Subscribers**, then **Subscriber Management**.

From this screen, type the users name into the **Search box**. As you type, the list will automatically filter to match your search term. From this screen, you can choose to **View** the user's profile which will provide an overview of their profile or you can choose **Edit**, which will allow you to make changes to their profile.

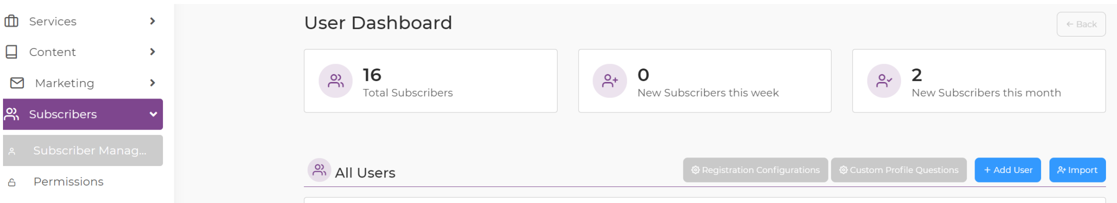


Subscriber Management

Custom Profile Questions

Adding profile questions to a user's account allows them to showcase their interests, what they are looking for and can really help jumpstart conversations.

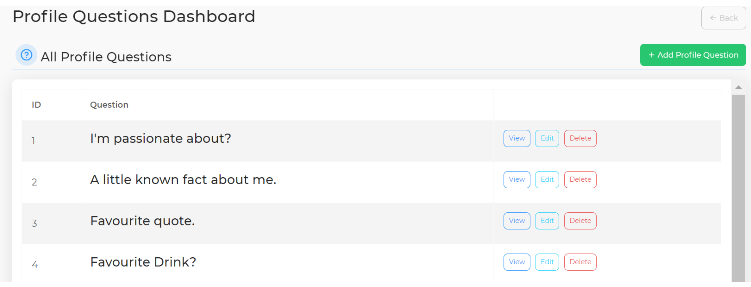
To do this click on **Admin** in the left-hand side panel, then **Subscribers,** then **Subscriber Management.** This will take you through to the User Dashboard in the Administration Area where you can manage your users.



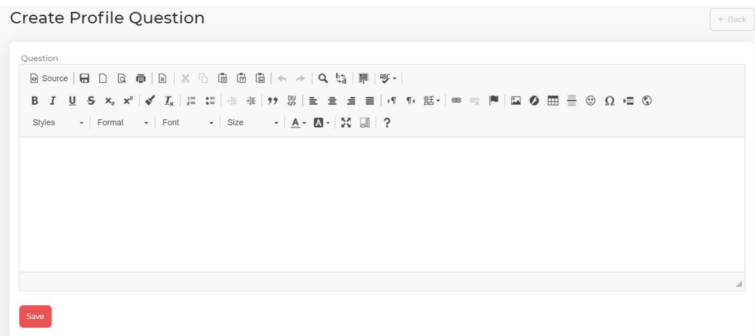
From here, click on the **Custom Profile Questions** button, which takes you to the Profile Questions Dashboard.

To edit an existing question, click on **Edit**, make your changes, and hit save.

To view an existing question, click **View**, this will show you how the question will look to the user.



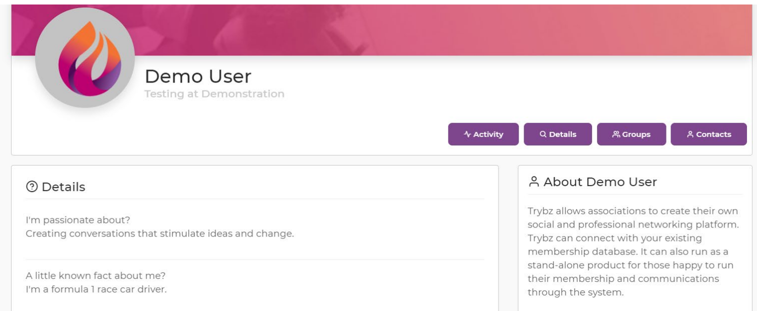
To add a new question, click **Add Profile Question**, enter your question, and hit **Save**.



Now that you have created your Custom Profile Questions, a User can answer these by **editing their**

user profile and scrolling to the bottom of the **Public Information panel** where the questions will be displayed and selecting **Save**.

With these questions answered, this is how a user's profile will be displayed to the community.



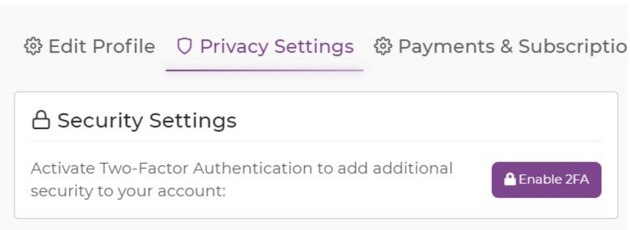
Privacy Settings

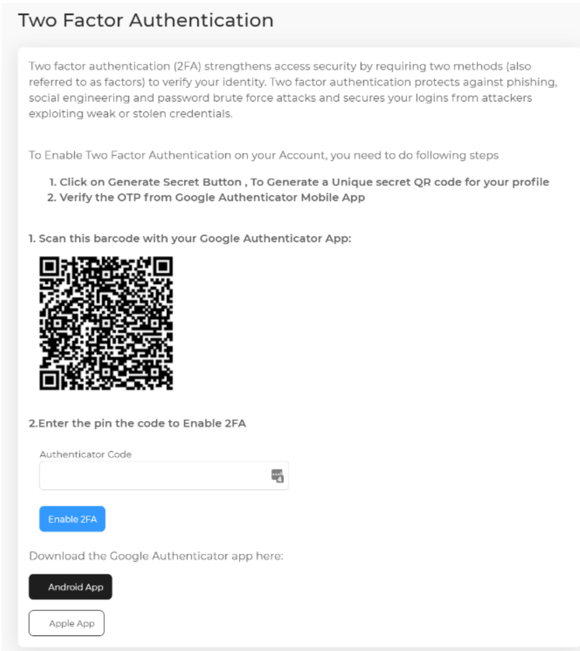
Privacy Settings gives a user full access to setup up Two Factor Authentication and update their email preferences.

Security Settings: Two Factor Authentication (2FA)

Two factor authentication (2FA) strengthens access security by requiring two methods (also referred to as factors) to verify your identity. On our platform we use the Google Authenticator App which is available on both Android and Apple Phones.

The activate this, click **Edit profile**, then select **Privacy Settings** tab, select **Enable 2fA** button and follow the prompts on the screen.





Enabling this will provide a higher level of security to your user's accounts.

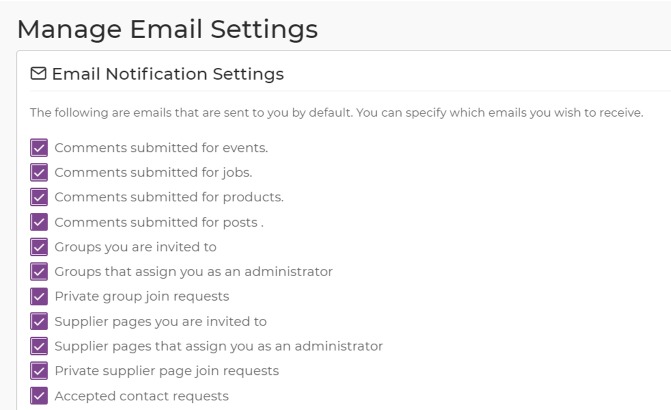
Email Settings

The platform provides a wide selection of email notifications that an administrator can use to keep their members up-to-date and regularly checking in with the community platform.

We recommend launching your platform with all notifications turned on.

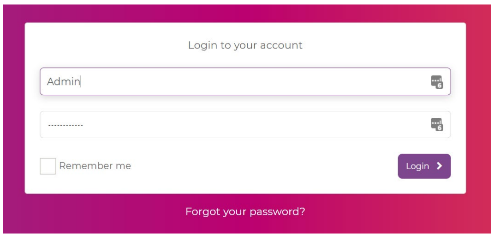
A user can update their email notifications, by selecting **Edit Profile**, **Privacy Settings** tab, **Manage Email Settings** button.

On this page a user can edit their email preferences by unchecking boxes for the emails they do not wish to receive from the platform and then selecting ***Save***.



Reset Password

An administrator can see a user's full profile, but not their password, this is private only to the user. If a user misplaces their password, they will need to select **Forgot your password**? from the login screen. The platform will then send an automatic email to user where they can re-set their password instantly and continue logging into the community.

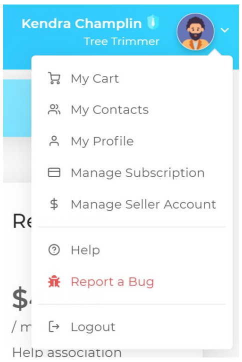


Zoom Integration

If a user wants to connect their Zoom Account, they will firstly need to authorise their Zoom account. This can be done by clicking on your avatar icon in the top right of the screen and select **Edit Profile** from the dropdown menu. Then select **Edit Profile**, **Privacy Settings** tab, **Zoom Integration** button, click on **Authorize Zoom**. A user can now start hosting their own webinars and meetings through the Events section in the community.

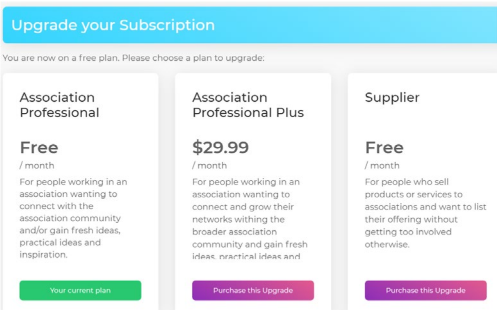
Manage Subscription – User View

If a user wants to manage or upgrade their subscription, they can do this by clicking on their avatar icon in the top right of the screen and select **Manage Subscription** from the dropdown menu.



On the next screen a user will be able to see their current subscription as it will say "**Your Current Plan**".

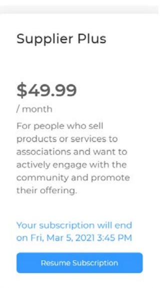
To upgrade, they will need to choose their appropriate plan, then select **Purchase this Upgrade**.

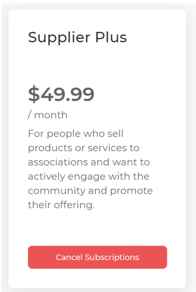


If a user is upgrading to a paid subscription, they will be taken through to the payment screen to enter their credit card details and finalise their purchase. Once purchased, the subscription will immediately be upgraded, and all the community members benefits applied. If any member benefits are offline, these will still need to be actioned by Admin offline.

If a user is downgrading their subscription, they will receive a notification to confirm they want to proceed and once confirmed, they will see a date/time stamp of when their subscription will end.

If for any reason a user changes their mind, they can select **Resume Subscription** and their Subscription will be reactivated immediately.

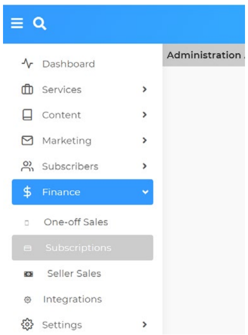




Manage Subscription - Admin View

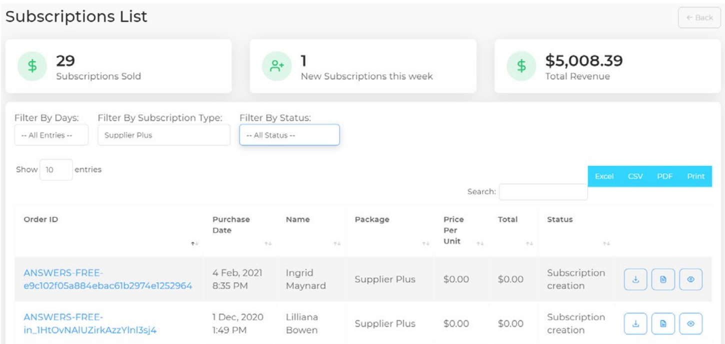
This area provides the Admin with an overview of their members subscriptions.

From the left side panel, click on **Admin**, **Finance**, **Subscriptions**.



The Subscription List Dashboard provides an overview of all member subscriptions, including total **Subscriptions Sold**, **New Subscriptions this Week** and **Total Revenue**. From here you can …

- Sort your subscriptions using the Filter drop down boxes to show, **Subscription By Type**, **By Status** or **By Day**.
- Search for a user's name using the **Search bar**, which will automatically filter as you type.
- Export a list of your members to **Excel**, **Create a PDF** or **Print** by selecting the appropriate buttons next to the Search bar.
- **Download a Receipt**, **Generate a Receipt** or **View Sale** for each user by selecting the appropriate button to the right of the user's name.

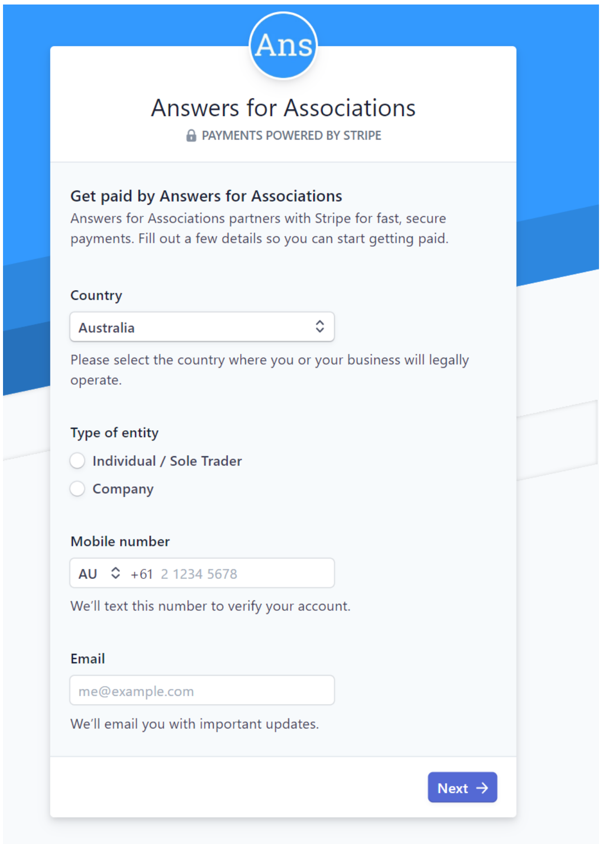


Subscription Notifications

Each time a user purchases a new subscription, or renews their subscriptions, the administrator will receive an automatic email to let them know this transaction has taken place. The email will show who the subscription was for, the plan they are on and provide a link for you to view the purchase on the Subscriptions List Dashboard.

Manage Seller Account – User View

A user wanting to sell something through the platform will need to activate their seller account so that they can transact payments through the community. This is only applicable for users of the site.



This can be accessed through ***Edit Profile*** page or using the top right avatar menu and clicking ***Manage Seller Account.*** This will take you to a page hosted by Stripe who is our preferred merchant facility and is one of the leading providers of online credit card transactions.

The Stripe Connect Service will take you through a process of verifying the users account and identity to allow them to sell products, event tickets, resources, videos and more on our platform and be paid directly into your bank account.

After you have set up your account with Stripe Connect you will then be taken to your dashboard that you can visit any time to update your settings, see your sales and manage your payouts.

All transactions and personal data is managed by Stripe and you can access it any time via the “manage seller account” button or visiting stripe.com

Payments will be distributed directly to the sellers account and platform owner account within 5-7 days after the transaction has taken place.

Seller Account Notifications

Each time an Administrator or User lists an item for sale in the community and someone purchases it, an automatic email will be sent to both the purchaser and seller to confirm that a transaction has taken place. These emails can be used as prompts if an item that was purchased requires offline attention ie. posting a book. If it is for an event, resource or subscription, the action will automatically happen online.

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Groups

Create a Group

You can create a group, by selecting **Groups** in the left-hand services menu, which will bring you to the Groups Home Page. Next you click on **New Group** and update all the fields, making sure to clearly explain the purpose of your group, then hit **Save**. Your Group will then automatically appear in the Groups Home Page.

Manage your Group

Now that you've created your group you probably want to know how to get the most out of it right?

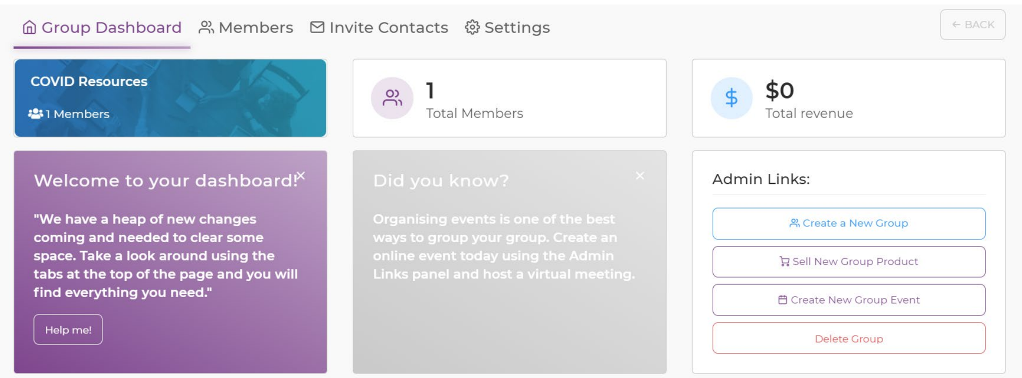
The best way to get your community up and running is to make your first post! Of course, with no other members yet you'll be the only one who sees it, however before long you'll have people coming to look at your group and having a post there first is a great way to make them feel welcome. Click into the post box to start writing and add an image (or a whole gallery) to make your post really stand out. You can also include url links and hashtags.

Group Dashboard – User View

The next step is to head to the admin area for your group. You can find this button on your group page in the top right corner and select **Admin.** This button is only visible to Group Administrators.

On this page, you also have some additional functions that will allow you to **Sell New Group Product or Create New Group Event.** Selecting either of these options, will list these services against your group and will also display them in the Main Store and Groups Directory, unless you make your group private.

Or, if you are done with your group you can press the **Delete Group** button but be aware, once it's gone it's gone!



Group Settings: Edit Group Page and Privacy Setting – User View

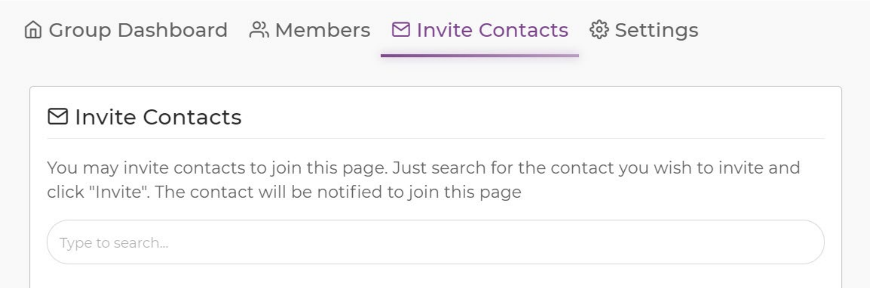
Within the Group **Admin**, click on the **Settings** tab. This screen will take you to your group details where you can update the details you entered when you created your group. You can also change your group between **Public** or **Private.**

If choosing **Public**, your group will be displayed in the Groups Directory for all users to Join and see your group's posts and content.

If choosing **Private**, your group will be displayed in the Groups Directory, however no users can see your groups posts or content. A user must submit a request to join your group, the group admin will then receive a notification where they can choose to accept or deny access to that user's request. Once accepted, a user will be able to see all content within the group.

Invite Contacts – User View

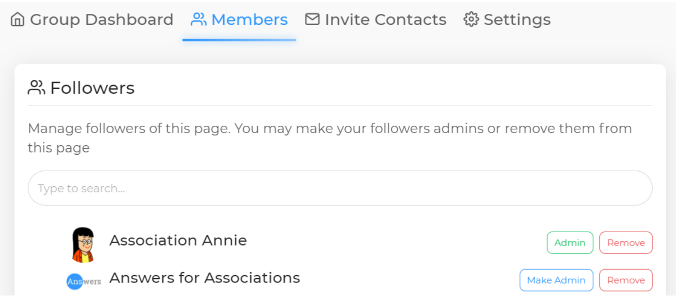
Within the Group **Admin**, click on the **Invite Contacts** tab. This screen gives you the option to invite new contacts to join your page. To do this, you need to click into the **Search box** and type their name and once located, click invite. They will then be notified by email and will have the choice to Accept or Decline your invite.



Members: Manage Followers, Assign Admin Roles - User View

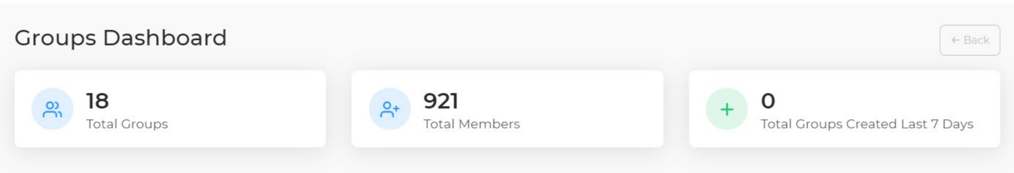
Within the Group **Admin**, click on the **Members** tab. This screen gives you the option to remove group members or promote them to be an administrator with you. To do this, you need to click into the **Search box** and type their name and once located, click **Admin** or **Remove**.

Assigning an Admin role will allow that user to post on behalf of the group, Edit the Group details, Assign new Admin roles and Remove users from the group.



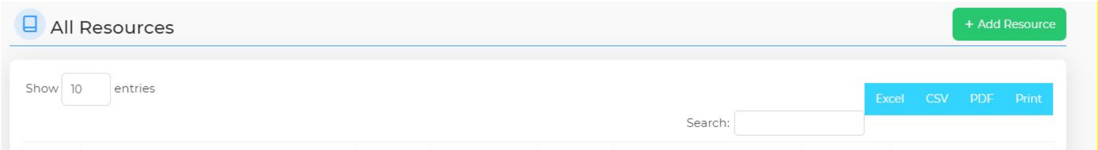
Groups Dashboard – Admin View

The Groups Dashboard provides a snapshot of all Groups listed in your Community. This can be accessed from **Admin>Services>Groups.** From this screen you will see **Total Groups, Total Members, Total Groups Created Last 7 Days.**



You can also **View**, **Edit** or **Delete** individual Groups from this screen, by selecting the appropriate button next to the line item.

You can also search and export your Groups into **Excel**, **CSV**, **PDF** or **Print**, by selecting the appropriate button.



Create New Group – Admin View

To navigate to this page, select **Admin>Services>Groups>Add Group.** This screen gives you the opportunity to Create a New Group by filling out each of the fields. Once finished, click **Save** and your Group will automatically appear in the Groups Directory.

Featured Group – Admin View

You can choose to feature specific Groups on your homepage sidebar. This can only be authorised by an Administrator of the community.

- This can be accessed from **Admin>Services>Groups** locate the Group you'd like to feature.
- Select the **Edit** button to the right of the event listing.
- At the bottom of this page under the **Admin Controls**, in the **Featured** dropdown box, choose between **Yes** or **No**. If event is featured, it will appear on home page side bar.

Edit Group – Admin View

You can edit a Group by going to **Admin>Services>Groups.** Locate your Group using the search bar and select the **Edit** button to right of the Group line item.

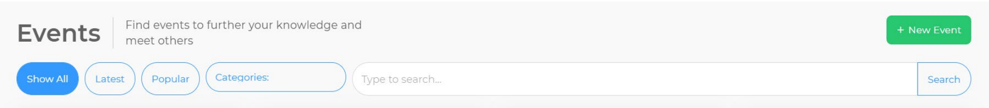
This screen gives you the option to edit your Group and the associated fields which you entered when you originally created your Group, including updating the title, description, and images.

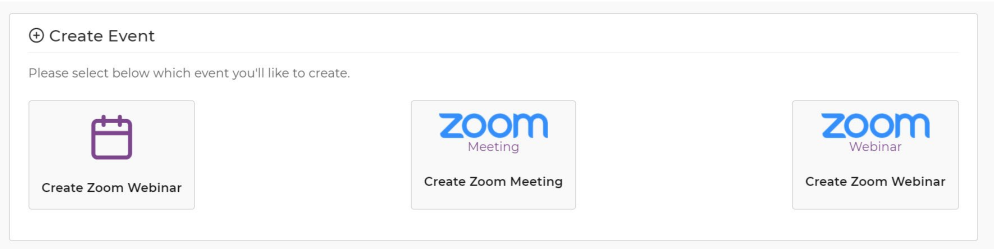
If you don't want your Group in the Community anymore you can also use the "delete" button to delete it permanently.

Events

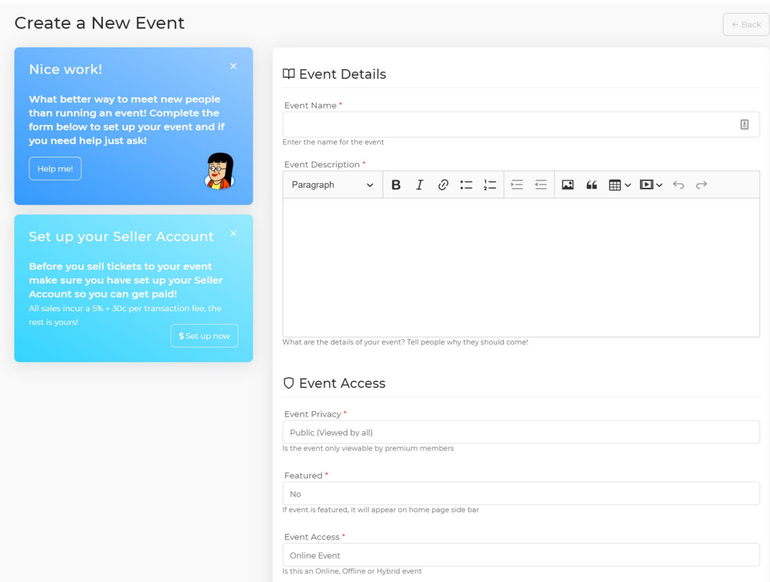
Create New Event: Event, Zoom Meeting or Zoom Webinar – User View

You can create a New Event, by selecting **Events** in the left-hand services menu, which will bring you to the Events Home Page. From here you can choose to create an **Event**, **Zoom Meeting** or **Zoom Webinar**.





Next, click on your preferred event option and update all the fields, making sure to clearly explain the purpose of your group, then hit **Save**. Your Event will then automatically appear in the Groups Home Page, unless you have chosen to make your Event Private. If creating tickets or linking to an external site, see below.



Create Event: Link to External Site – User View

Once all fields have been completed, you have the option to link your event to an "external site" or "Charge for tickets".

Linking to External Site gives you the option to add a url, which will re-direct delegates to an external site, where they can register for this event. To do this, you can enter the url into the below field ie. http://www.trybz.com.au

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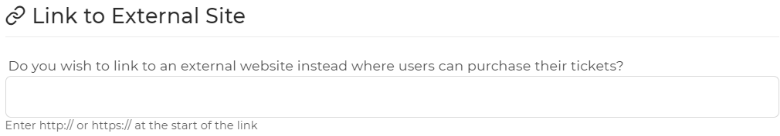


Create Event: Charge for Tickets – User View

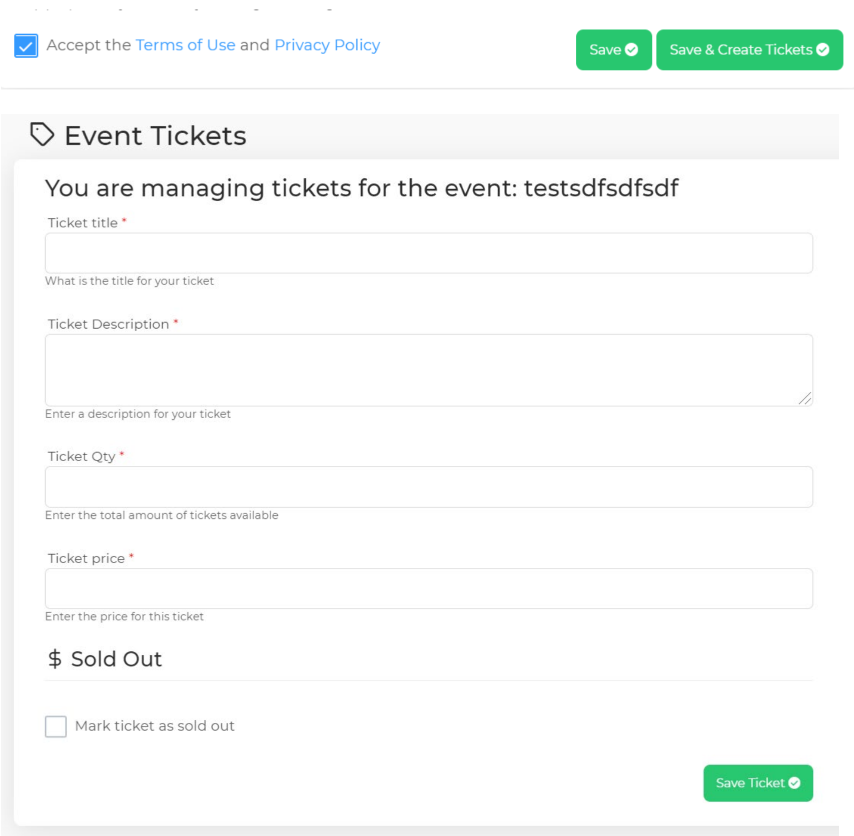
Once all fields have been completed, you have the option to link your event to an “external site” or “Charge for tickets”.

Create Tickets gives you the option to ticket your event whether free or paid. To do this, select ***Save & Create Tickets*** button at the bottom of the Event page. On the next page, you will need to complete all the fields, then select ***Save Ticket***.

- **Ticket Title:** This is the name of the ticket type. Be as descriptive as possible as this will be displayed as a line item on the user’s invoice.
- **Ticket Description**: This gives users an explanation as to what is included with the ticket.
- **Ticket Qty**: This is the maximum number of tickets available for this event.
- **Ticket Price**: This is the per ticket price which includes gst.

You also have the option to manually change your event to **Sold Out** by selecting the box **Mark Ticket as Sold Out**. And once the events tickets have all been purchased, the event will automatically change its status to Sold Out which users will see in the Events Directory.

Once you have finished setting up your tickets, press the **Save Ticket** button. Your Event will automatically appear in the Events Home Page and in your news feed.



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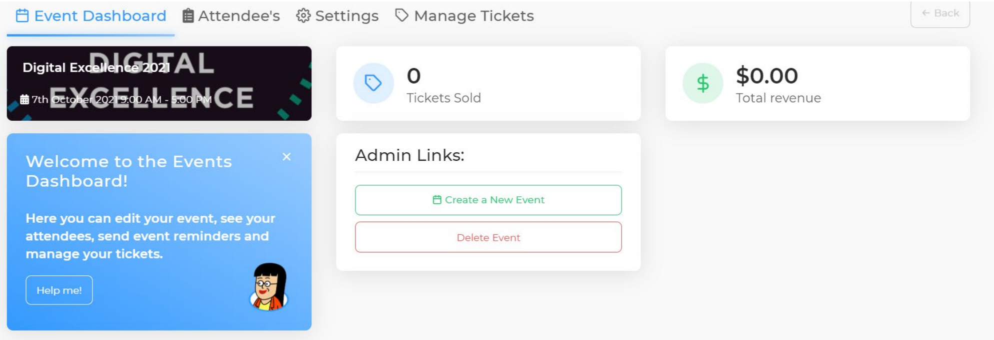
Event Dashboard: Manage Your Event – User View

Once your event is created, open your event, select the **Admin** button in the top right hand of screen and select **Edit this Event** button at the bottom of the page to go to the **Event Dashboard**.



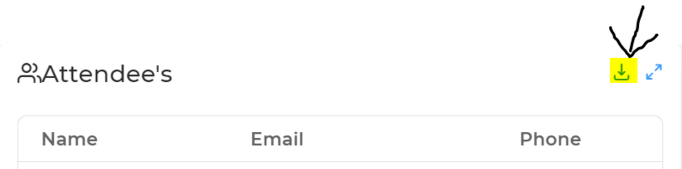
From the Dashboard you can access the event management tabs across the top as well as see a snapshot of **Tickets Sold** or **Total Revenue.**

From this screen you can also choose to **Delete Event**, if you choose this option your event will be permanently removed from the community. Depending on your reason, you may be best to mark the event as Sold Out. This way the event will stay in the community and will automatically disappear from the Events Directory once the date has passed.

Manage Event Attendee's – User View

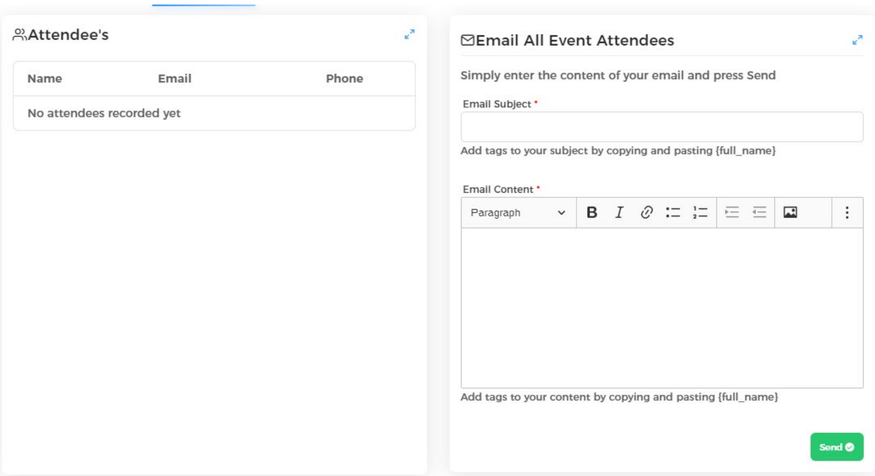
Within the Event **Admin**, click on **Attendee's** tab which will show you a page with a list of all users who have purchased tickets to your event.

If you have registrations for your event you can download an Excel spreadsheet of each attendee by selecting the **download attendee's** button highlighted below. This button will only appear if there are registered attendees to this event.



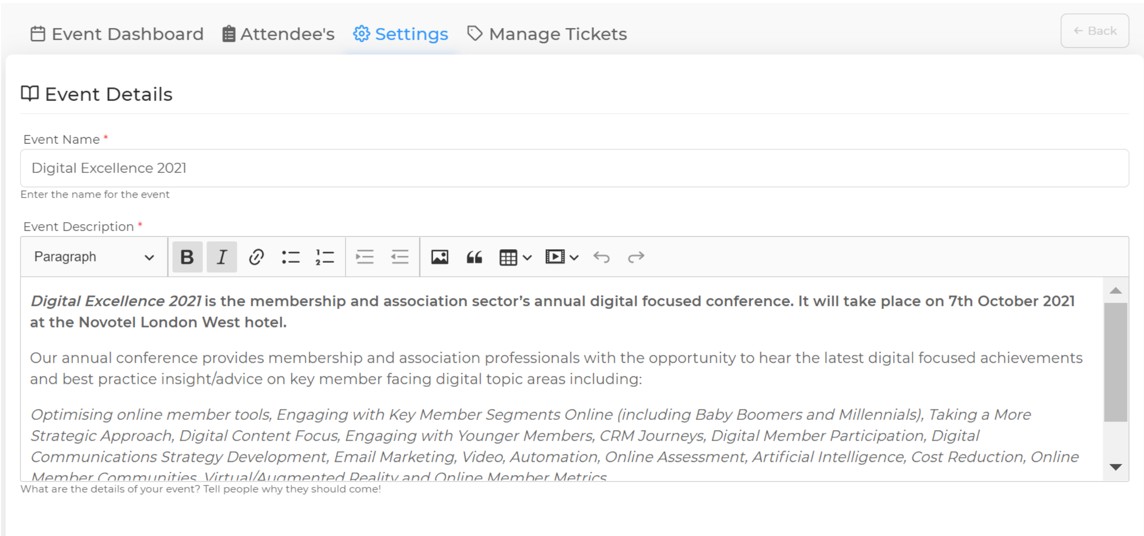
Email Event Attendee's – User View

Within the Event **Admin**, click on **Attendee's** tab, from here you can email the event attendees updates, or reminder notices. Note. If you have chosen to link your event, no attendees will be shown in this list.



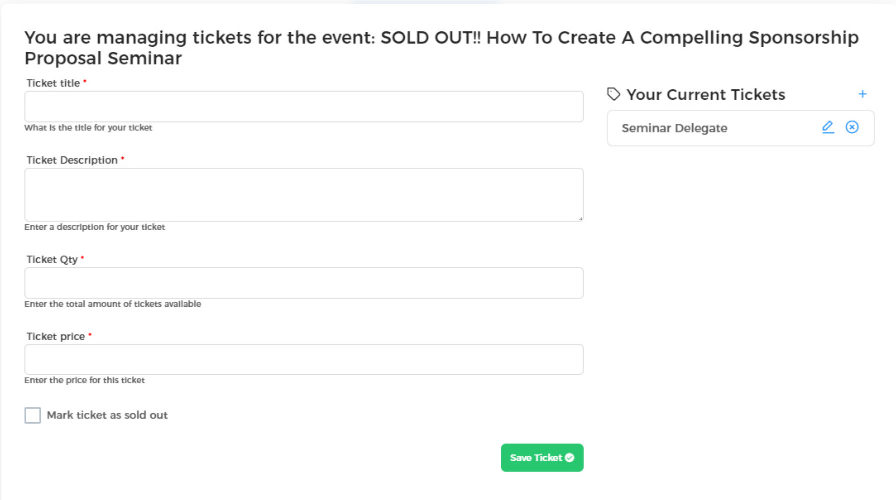
Update Event Setting – User View

Within the Event **Admin**, click on **Settings** tab across the top of the page. This screen gives you the option to edit the event name, event description and all of the other details about your event you entered when it was created. You can also change your event image. Just remember to email your attendees via the A**ttendee's** tab if you make significant changes to your event.



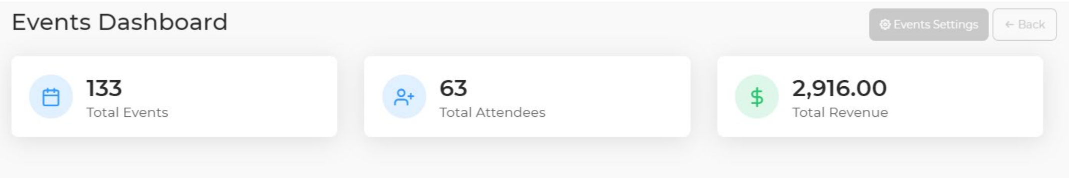
Manage your Event Tickets – User View

Within the Event **Admin**, click on **Manage Tickets** tab across the top of the page. This screen gives you the option to **Create new additional tickets** for your event or edit **Your Current Tickets.** You can also mark a ticket as sold out to no longer sell tickets and to label your event as a sold out event in the Events Directory.


You are managing tickets for the event: SOLD OUT!! How To Create A Compelling Sponsorship Proposal Seminar
Ticket title *
What is the title for your ticket
Ticket Description *
Enter a description for your ticket
Ticket Qty *
Enter the total amount of tickets available
Ticket price *
Enter the price for this ticket
Mark ticket as sold out
Save Ticket
Your Current Tickets
Seminar Delegate

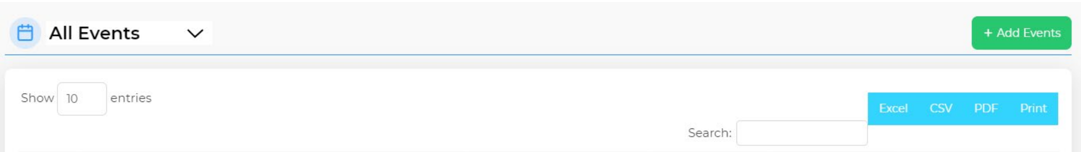
Events Dashboard – Admin View

The Product Dashboard provides a snapshot of all Products that are listed in your Store. This can be accessed from **Admin>Services>Events.** From this screen you will see **Total Attendees**, **Total Revenue**.



You can also **View**, **Edit** or **Delete** individual Events from this screen, by selecting the appropriate button next to the line item.

You can also export your Events into **Excel**, **CSV**, **PDF** or **Print**, by selecting the appropriate button.



Charging for Event Listing - Admin View

You can choose to setup how users of your system can create events and whether you charge a fee for event listings. This can be accessed from **Admin>Services>Events>Event Settings.**

From the **Charge for This Service** drop down box, you can choose **Free for All** or **Charge for Creation**.

- How to set up a Free Event Listing
  - From the **Charge for This Service** drop down box, select **Free for All**.
  - Then add a short description to explain this service.
  - Hit 'Save'. Your change will take effect immediately.
- How to set up a Charge for Events Listing
  - From the **Charge for This Service** drop down box, select **Charge for Creation**, a series of new drop-down boxes will then be displayed.
  - **Cost for Free Subscriptions:** This is where you can choose how much a subscriber will be charged to list an event in your community. This price includes gst.
  - **Qty for Free Subscriptions:** This is where you can choose the quantity of events a subscriber can list.
  - **Charge for Premium Subscribers**: This is where you choose if you will be charging your paid subscribers to list an event, or if it will be free for them. If it's free, you will want to include this in your subscription benefits.
  - Then add a short description to explain this service.
  - Hit 'Save'. Your change will take effect immediately.

Featured Events – Admin View

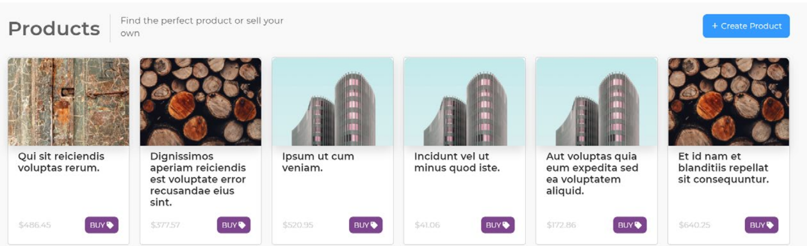
You can choose to feature specific events on your homepage sidebar or on the guest homepage.

- This can be accessed from **Admin>Services>Events,** locate the event you would like to feature.
- Select the **Edit** button to the right of the event listing.
- At the bottom of this page under the **Admin Controls**, in the **Featured** down box, choose between **Yes** or **No**. If event is featured, it will appear on home page side bar.
- Note. Featuring events can only happen on a per event basis, so you need to feature each event individually.

Products

Create New Product – User View

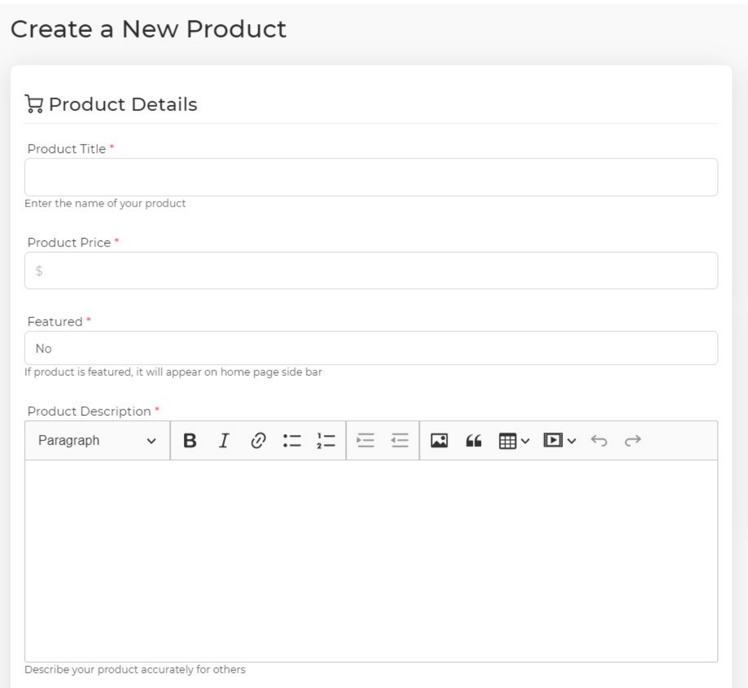
You can add a new Product to the Store, by selecting **Store** in the left-hand services menu, which will bring you to the **Product Home Page.**



Next you click on **Create Product** and update all the fields

- **Product Price**: Enter your price per item. This price includes gst.
- **Featured**: If the site administrator has this option turned on, then a user will have the choice to feature their product which will appear on home page side bar. Otherwise, the product will only show in the Store.
- **Product Description:** Provide a detailed description of the product you are selling.
- **External Link**: If you would like to link your product to an external site, you can enter a url. Just be mindful if you choose this option, you will be directing your users offsite from the community.
- **Product Image:** Include a photo of the product you are selling.
- **Product Category:** Choose the categories that are appropriate for the product you are selling. This will also help users search more easily for your product.

Once all fields have been completed, hit **Save** and your product will automatically appear in the **Product Home Page.**



Product Dashboard – User View

Your product is now online for sale! This document will help you get the most out of your product listing and help provide you with the information you need to get paid!

The next step is to head to the admin area for your Product. You can find this button on your Product page in the top right corner and select **Admin.** This button is only visible to Group Administrators.

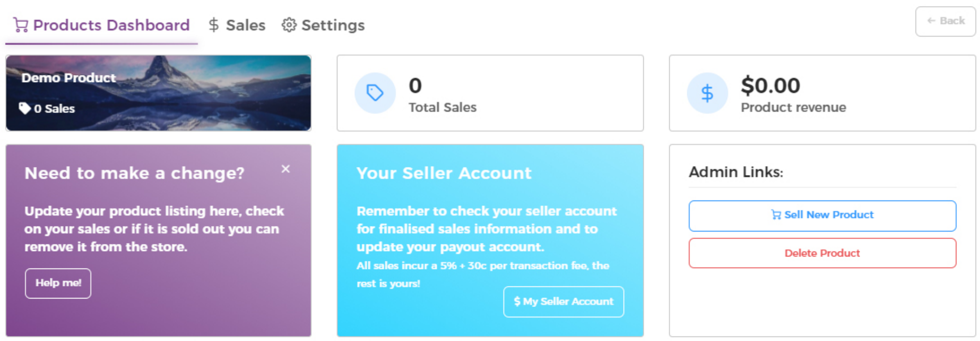
Your Dashboard provides a snapshot of **Total Sales**, **Product Revenue**, both are to date totals. On this page you can also **Export a Sales Report** to Xcel to see a full list of people who have purchased this product.

When someone purchases your product, they will receive an automatic email to confirm their purchase, you as the owner of this product will also receive an email confirmation as a prompt to action your next step.

Or, if you are done with your product you can press the **Delete Product** button but be aware, once it's gone it's gone!

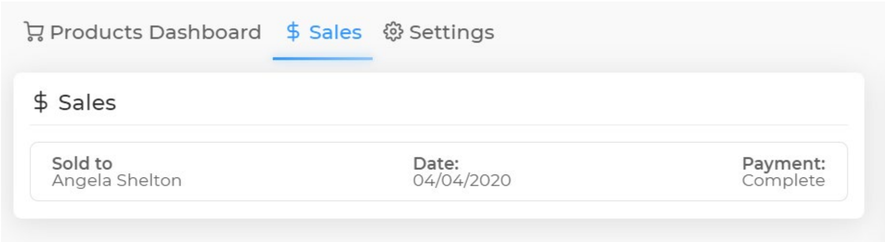
You Seller Account – User View

If you have not yet set up your seller account, you will not get paid for your sales! To do this, click on the **My seller Account** button on this page which will take you through the secure process of creating your account.



Manage Your Product Sales – User View

Within the Product **Admin**, click on the **Sales** tab across the top of the page which will take you to the Sales screen. Here you can see all your sales existing sales and purchaser details.



Manage Your Product – User View

Within the Product **Admin**, click on the **Settings** tab across the top of the page. This screen gives you the option to edit your Product which you entered when you originally created your product including updating the title, price and images.

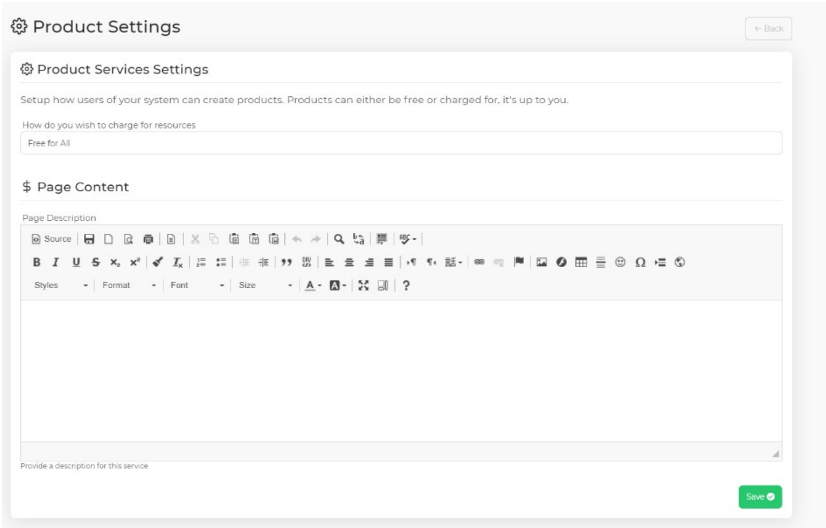
Product Settings – Admin View

You can choose to setup how users of your system can create products and whether you charge a fee for product listings. This can be accessed from **Admin>Services>Products>Product Settings.**

From the **Charge for This Service** drop down box, you can choose **Free for All** or **Charge for Creation**.

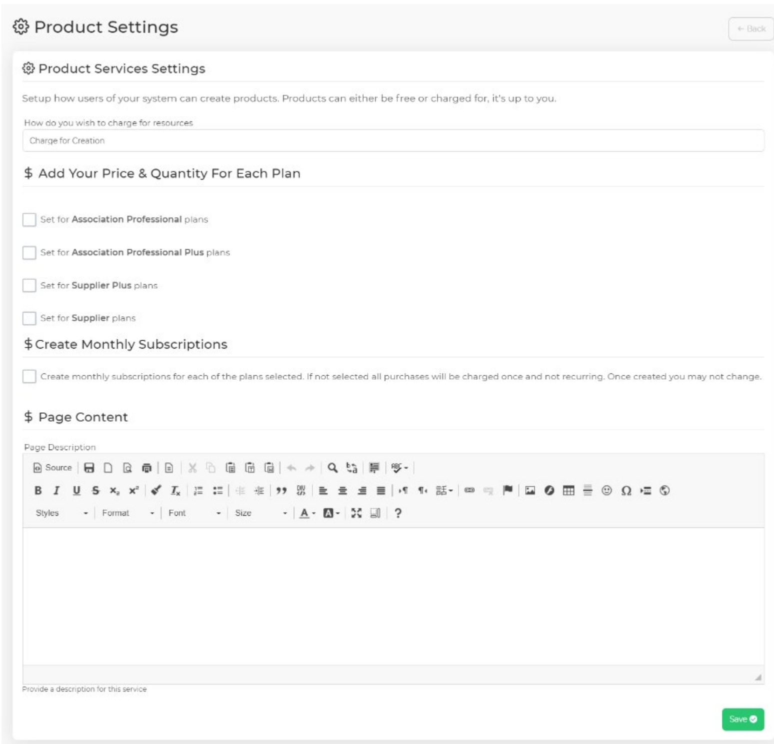
How to set up a Free Event Listing

- From the **Charge for This Service** drop down box, select **Free for All**.
- Then add a short description to explain this service.
- Hit 'Save'. Your change will take effect immediately.



How to set up a Charge for Events Listing

- From the **Charge for This Service** drop down box, select **Charge for Creation**, a series of new drop-down boxes will then be displayed.
- **Cost for Free Subscriptions:** This is where you can choose how much a subscriber will be charged to list an event in your community. This price includes gst.
- **Qty for Free Subscriptions:** This is where you can choose the quantity of events a subscriber can list.
- **Charge for Premium Subscribers**: This is where you choose if you will be charging your paid subscribers to list

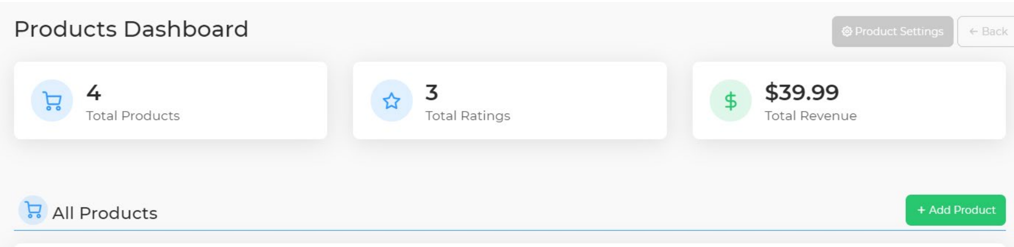


an event, or if it will be free for them. If it's free, you will want to include this in your subscription benefits.

- Then add a short description to explain this service.
- Hit 'Save'. Your change will take effect immediately.

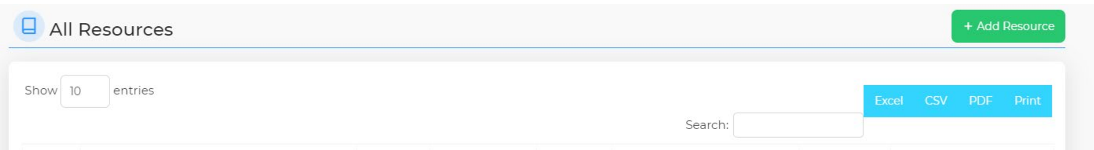
Product Dashboard – Admin View

The Product Dashboard provides a snapshot of all Products that are listed in your Store. This can be accessed from **Admin>Services>Products.** From this screen you will see **Total Product**, **Total Ratings**, **Total Revenue**.



You can also **View**, **Edit** or **Delete** individual Products from this screen, by selecting the appropriate button next to the line item.

You can also export your Resources into **Excel**, **CSV**, **PDF** or **Print**, by selecting the appropriate button.



Create New Product – Admin View

To navigate to this page, select **Admin>Services>Products>Add Product.** This screen gives you the opportunity to Create a New Product by completing each of the fields.

You will also need to **Add Your Price For Each Plan.** These prices will reflect your member benefits.

Featured Product – Admin View

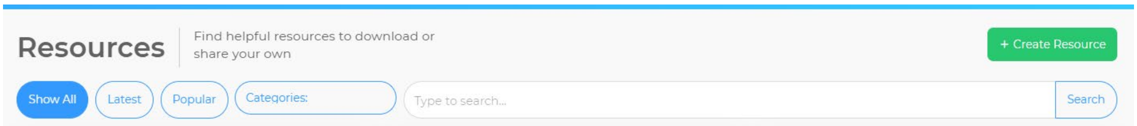
You can choose to feature specific Products on your homepage sidebar. This can only be authorised by an Administrator of the community.

- This can be accessed from **Admin>Services>Products** locate the Product you'd like to feature.
- Select the **Edit** button to the right of the event listing.
- At the bottom of this page under the **Admin Controls**, in the **Featured** dropdown box, choose between **Yes** or **No**. If event is featured, it will appear on home page side bar.

Resources

Create Resource – User View

You can add a new Resource to the Resource Library by selecting **Resources** in the left-hand services menu, which will bring you to the **Resource Home Page.**



Next you click on **Create Resource** and complete all listed fields.

- **Title**: Enter your Resource title. It is not possible to duplicate a name, this must be an individual title.
- **Featured**: If the site administrator has this option turned on, then a user will have the choice to feature their product which will appear on home page side bar. Otherwise, the product will only show in Resources.
- **File Type**: Choose the appropriate file type for your Resource.
- **File:** Upload your File in any of these formats' pdf, word, excel, PowerPoint.
- **Description:** Provide a detailed description of the Resource you are uploading.
- **Charge for This Service:** You can chose whether Your Resources will be Free to Download for All, or whether you are charging for each download.
- **Resource Category:** Choose the categories that are appropriate for your resources as this will assist users to search and locate your resource more easily.

Once all fields have been completed, hit **Save** and your Resource will automatically appear in the **Resource** library**.**

Edit Resource – User View

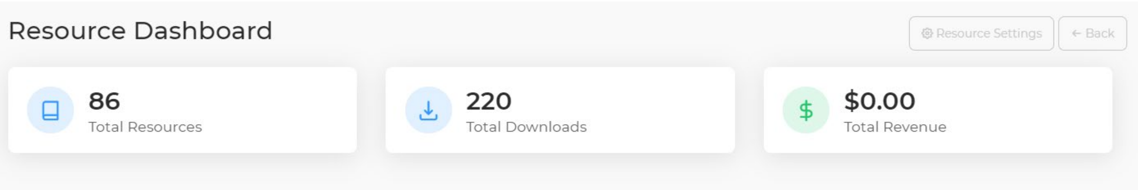
You can edit a Resource by opening the specific Resource and selecting **Edit** in the bottom right of the screen. This screen gives you the option to edit your Resource which you entered when you originally created your Resource including updating the title, price and images.

If you don't want your resource in the library anymore you can also use the "delete" button to delete it from the platform. Please note this is permanent.

NOTE: If you have not set up your seller account you will not get paid for your sales! Click on the "my seller account" button on this page to be taken through the secure process of creating your account.

Resource Dashboard – Admin View

The Resource Dashboard provides a snapshot of all Resources listed in your Resource Library. This can be accessed from **Admin>Services>Resources.** From this screen you will see **Total Resources**, **Total Downloads**, **Total Revenue**.



You can also **View**, **Edit** or **Delete** individual Resources from this screen, by selecting the appropriate button next to the line item.

Create New Resource – Admin View

To navigate to this page, select **Admin>Services>Resource>Add Resource.** This screen gives you the opportunity to Create a New Resource by completing each of the fields.

You will also need to **Add Your Price For Each Plan.** These prices will reflect your member benefits.

You can also choose to link this Resource to a specific Supplier, so that this will show against their Supplier Page. To do this, **select Supplier** in the Supplier dropdown box. This will automatically show against the Suppliers profile on their page.

Featured Resource – Admin View

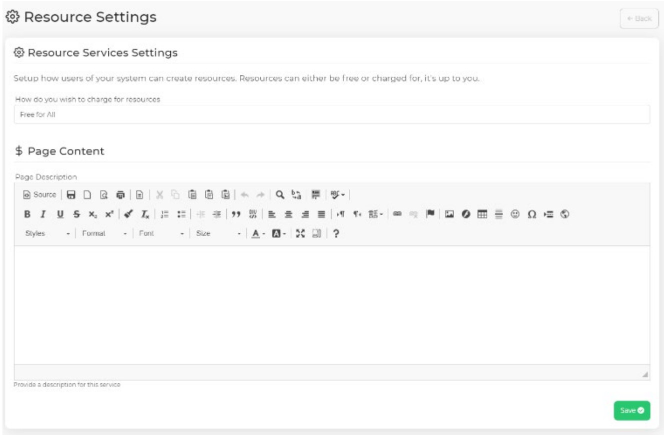
You can choose to feature specific Resources on your homepage sidebar. This can only be authorised by an Administrator of the community.

- This can be accessed from **Admin>Services>Resources** locate the Resource you would like to feature.
- Select the **Edit** button to the right of the Resource listing.
- At the bottom of this page under the **Admin Controls**, in the **Featured** dropdown box, choose between **Yes** or **No**. If event is featured, it will appear on home page side bar.

Resource Settings – Admin View

You can choose to setup how users of your system can create Resources and whether you charge a fee for resource listings. This can be accessed from **Admin>Services>Resources>Resource Settings.**

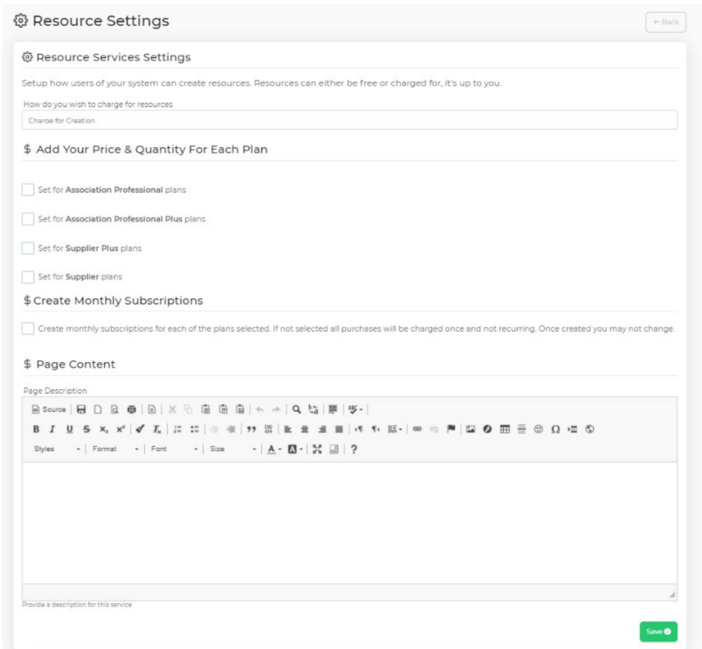
From the **Charge for This Service** drop down box, you can choose **Free for All** or **Charge for Creation**.



How to set up a Free Event Listing

- From the **Charge for This Service** drop down box, select **Free for All**.
- Then add a short description to explain this service.
- Hit 'Save'. Your change will take effect immediately.

How to set up a Charge for Events Listing



- From the **Charge for This Service** drop down box, select **Charge for Creation**, a series of new drop-down boxes will then be displayed.
- **Cost for Free Subscriptions:** This is where you can choose how much a subscriber will be charged to list an event in your community. This price includes gst.
- **Qty for Free Subscriptions:** This is where you can choose the quantity of events a subscriber can list.
- **Charge for Premium Subscribers**: This is where you choose if you will be charging your paid subscribers to list an event, or if it will be free for them. If it's free, you will want to include this in your subscription benefits.
- Then add a short description to explain this service.
- Hit 'Save'. Your change will take effect immediately.

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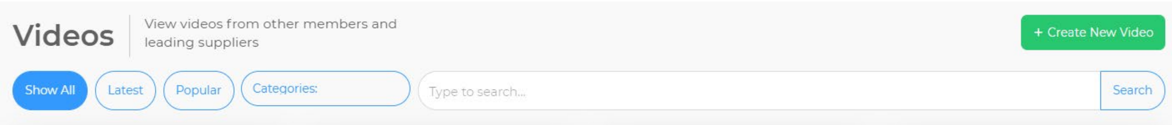
Videos

Create Video – User View

You can add a new Video to the Video Library by selecting **Videos** in the left-hand services menu, which will bring you to the **Videos Home Page.**

From here you can use the search function to look up other videos or you can select **Create New Video**.



- **Title**: Enter your Resource title. It is not possible to duplicate a name, this must be an individual title.
- **Featured**: If the site administrator has this option turned on, then a user will have the choice to feature their product which will appear on home page side bar. Otherwise, the product will only show in Resources.
- **Video:** Upload your File in any of these formats' pdf, word, excel, PowerPoint.
- **Cover:** This is an image that will represent your recording in the video library.
- **Description:** Provide a detailed description of the Video you are uploading.
- **Charge for This Service:** You can chose whether Your Resources will be Free to Download for All, or whether you are charging for each download.
- **Resource Category:** Choose the categories that are appropriate for your resources as this will assist users to search and locate your resource more easily.
- **Assign this Video to an Event:** You have the option to assign this video to a past or future event, by selecting the event from the dropdown box.

Once all fields have been completed, hit **Save.** After uploading your video you will need to wait for it to be converted and added to the library, this normally takes a couple of minutes and once completed, you'll receive a notification and can then view it via the "videos" tab.

and your Video will automatically appear in the **Video** library**.**

Edit Video – User View

You can edit a Video by opening the specific Video and selecting **Edit** in the bottom right of the screen. This screen gives you the option to edit your Video which you entered when you originally created your Video including updating the title, price and images.

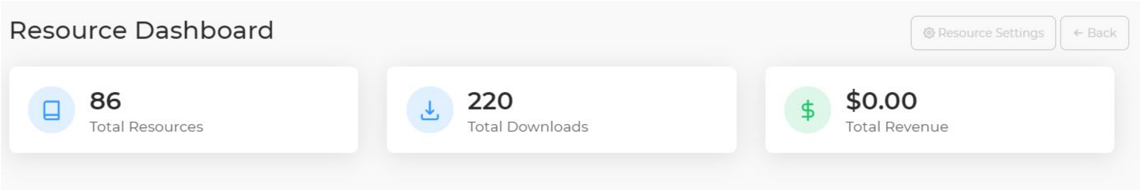
If you don't want your Video in the library anymore you can also use the "delete" button to delete it from the platform. Please note this is permanent.

If you have made your video free you can also add a price to view it and you'll get paid directly when someone purchases your video to view.

NOTE: If you have not set up your seller account you will not get paid for your sales! Click on the **My seller account** button on this page to be taken through the secure process of creating your account.

Video Dashboard – Admin View

The Video Dashboard provides a snapshot of all Videos listed in your Video Library. This can be accessed from **Admin>Services>Videos.** From this screen you will see **Total Videos**, **Total Downloads**, **Total Revenue**.



You can also **View**, **Edit** or **Delete** individual Resources from this screen, by selecting the appropriate button next to the line item.

Create New Resource – Admin View

To navigate to this page, select **Admin>Services>Resource>Add Resource.** This screen gives you the opportunity to Create a New Resource by completing each of the fields.

You will also need to **Add Your Price For Each Plan.** These prices will reflect your member benefits.

You can also choose to link this Resource to a specific Supplier, so that this will show against their Supplier Page. To do this, **select Supplier** in the Supplier dropdown box. This will automatically show against the Suppliers profile on their page.

Featured Resource – Admin View

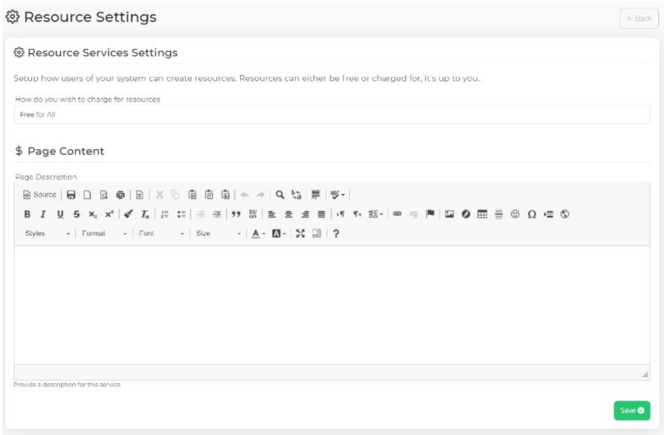
You can choose to feature specific Resources on your homepage sidebar. This can only be authorised by an Administrator of the community.

- This can be accessed from **Admin>Services>Resources** locate the Resource you would like to feature.
- Select the **Edit** button to the right of the Resource listing.
- At the bottom of this page under the **Admin Controls**, in the **Featured** dropdown box, choose between **Yes** or **No**. If event is featured, it will appear on home page side bar.

Resource Settings – Admin View

You can choose to setup how users of your system can create Resources and whether you charge a fee for resource listings. This can be accessed from **Admin>Services>Resources>Resource Settings.**

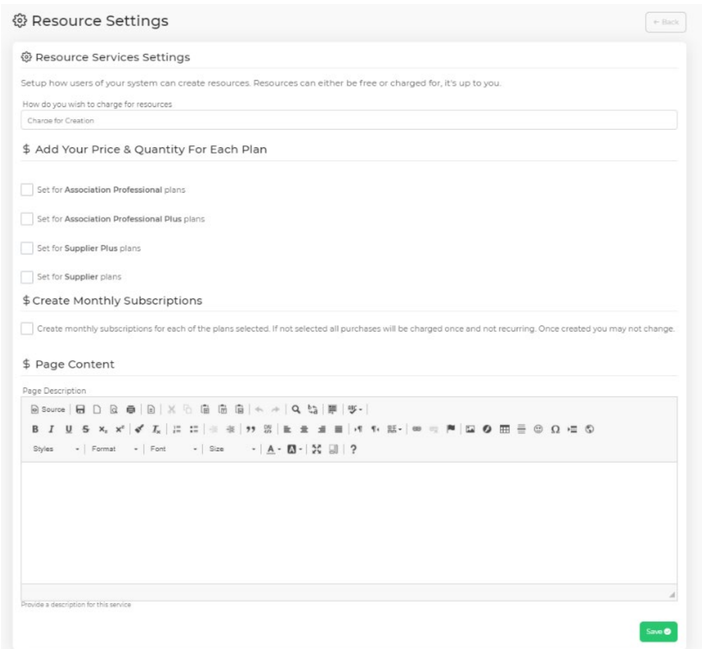
From the **Charge for This Service** drop down box, you can choose **Free for All** or **Charge for Creation**.



How to set up a Free Event Listing

- From the **Charge for This Service** drop down box, select **Free for All**.
- Then add a short description to explain this service.
- Hit 'Save'. Your change will take effect immediately.

How to set up a Charge for Resource Listing



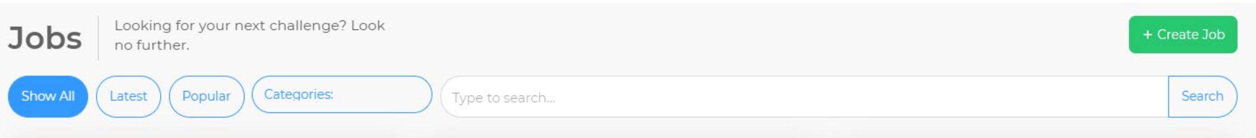
- From the **Charge for This Service** drop down box, select **Charge for Creation**, a series of new drop-down boxes will then be displayed.
- **Cost for Free Subscriptions:** This is where you can choose how much a subscriber will be charged to list an event in your community. This price includes gst.
- **Qty for Free Subscriptions:** This is where you can choose the quantity of events a subscriber can list.
- **Charge for Premium Subscribers**: This is where you choose if you will be charging your paid subscribers to list an event, or if it will be free for them. If it's free, you will want to include this in your subscription benefits.
- Then add a short description to explain this service.
- Hit 'Save'. Your change will take effect immediately.

Jobs

Create Video – User View

You can add a new Job to the Jobs Board by selecting **Jobs** in the left-hand services menu, which will bring you to the **Jobs Home Page.**

From here you can use the search function to look up other Jobs or you can select **Create New Job**.



- **Job Title**: Enter your Job title that best fits this position.
- **Featured**: Choose whether to feature your Job so that it appears on home page side bar.
- **Employment Type:** Choose from the dropdown box the best match.
- **Position Location:** Enter the Suburb and State.
- **Close Date:** Choose a date that your advertisement will expire and disappear form the Jobs Board.
- **Close Time:** Choose the time that your advertisement will expire and disappear form the Jobs Board.
- **External Link:** You have the option to include a url, that will direct users away from your community.
- **Description:** Provide a detailed description of the Position.
- **Salary:** Include the appropriate salary and benefits.
- **Hide Salary:** You can choose to hide the salary from the job listing by ticking this box.
- **Custom Salary:** Customise the pay information that will be displayed on the job listing.
- **Organisation Name:** Insert the name of the organisation.
- **Organisation Description:** Insert a description of the organisation.
- **Organisation Size**: Choose from the dropdown box the best match.
- **Organisation Logo**: Upload the Organisations Logo
- **Application Email:** Insert the email applicants should use to contact the organisation.
- **Resource Category:** Choose the categories that are appropriate for your resources as this will assist users to search and locate your resource more easily.

Once all fields have been completed, hit **Save.** Your **Job** will then automatically appear in the **Jobs Board.**

Edit Job – User View

You can edit a Job by opening the specific Job in the Jobs Board and selecting **Edit** in the bottom right of the screen.

This screen gives you the option to edit your Job information which you entered when you originally created your Job. You can also export a report of all application who have applied for this position through the community.

If you don't want your Job listed in the Jobs Board anymore you can also use the "delete" button to delete it permanently from the community.

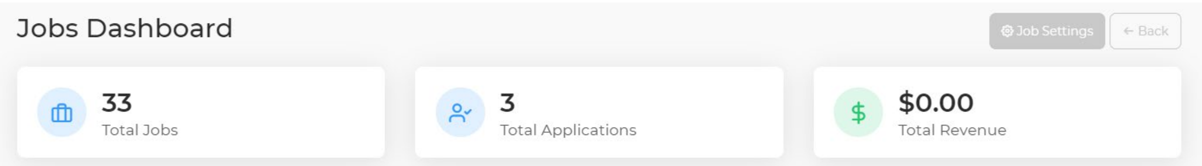
Apply for a Job – User View

A user can apply for a Job, by opening the Job Listing and selecting the **Apply** button in the bottom right of the screen. From here the user will need to enter their contact information, upload their resume and cover letter and select **Save**.

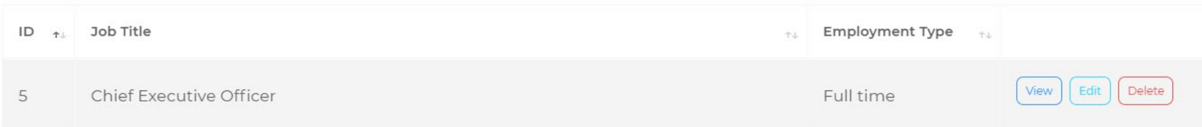
Note, there will be no record on the users account or newsfeed that they have applied for this role, it will remain completely private to all our users and admins of the community.

Jobs Dashboard – Admin View

The Jobs Dashboard provides a snapshot of all Jobs listed in your Community. This can be accessed from **Admin>Services>Jobs.** From this screen you will see **Total Jobs, Total Applicants and Total Revenue**.



You can also search or **View**, **Edit** or **Delete** individual Jobs from this screen, by selecting the appropriate button next to the line item.



ID	Job Title	Employment Type	
5	Chief Executive Officer	Full time	View Edit Delete

Create New Job – Admin View

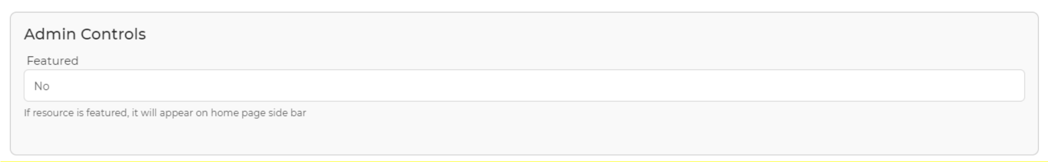
To navigate to this page, select **Admin>Services>Jobs>Add Job.** This screen gives you the opportunity to Create a New Job by completing each of the fields.

Featured Job – Admin View

You can choose to feature a specific Job on your homepage sidebar. This can only be authorised by an Administrator of the community.

- This can be accessed from **Admin>Services>Jobs** locate the Job you would like to feature.
- Select the **Edit** button to the right of the Job listing.

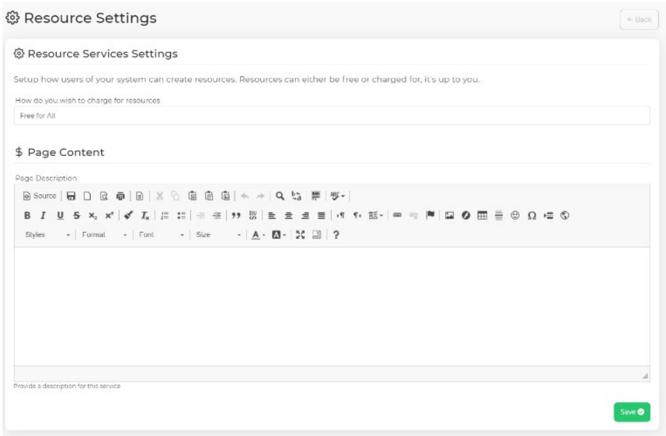
- At the bottom of this page under the **Admin Controls**, in the **Featured** dropdown box, choose between **Yes** or **No**. If event is featured, it will appear on home page side bar.



Job Settings – Admin View

You can choose to setup how users of your system can create Resources and whether you charge a fee for resource listings. This can be accessed from **Admin>Services>Jobs>Job Settings.**

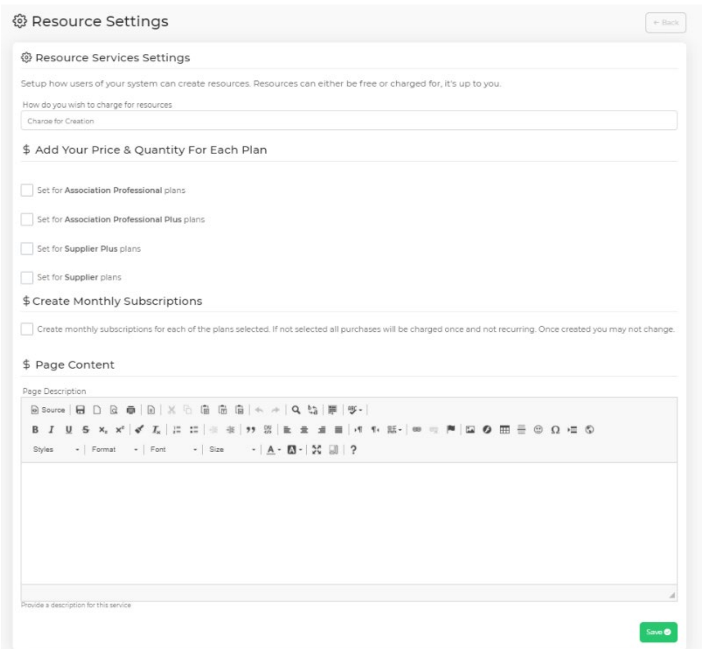
From the **Charge for This Service** drop down box, you can choose **Free for All** or **Charge for Creation**.



How to set up a Free Job Listing

- From the **Charge for This Service** drop down box, select **Free for All**.
- Then add a short description to explain this service.
- Hit 'Save'. Your change will take effect immediately.

How to set up Charge for Job Listing



- From the **Charge for This Service** drop down box, select **Charge for Creation**, a series of new drop-down boxes will then be displayed.
- **Cost for Free Subscriptions:** This is where you can choose how much a subscriber will be charged to list an event in your community. This price includes gst.
- **Qty for Free Subscriptions:** This is where you can choose the quantity of events a subscriber can list.
- **Charge for Premium Subscribers**: This is where you choose if you will be charging your paid subscribers to list an event, or if it will be free for them. If it's free, you will want to include this in your subscription benefits.
- Then add a short description to explain this service.
- Hit 'Save'. Your change will take effect immediately.

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Supplier Page

The supplier portal is a place for your suppliers, businesses, or sponsors (whatever you may be calling them) to come together and showcase their products, services, and knowledge. Each page allows them to perform a range of activities, such as:

- Share Content through their **Newsfeed**.
- Host their own **Events.**
- Sell their products through their **Store.**
- Share their checklists and whitepapers through their **Resources.**
- Share their pre-recorded webinars through their **Video** Library.

Create a Supplier Page – User View

You can create a new supplier page by selecting **Supplier** in the left-hand services menu, which will bring you to the **Suppliers Home Page.**

From here you can use the search function to look up other Suppliers or you can select **Create Supplier Page** and complete all the necessary fields.

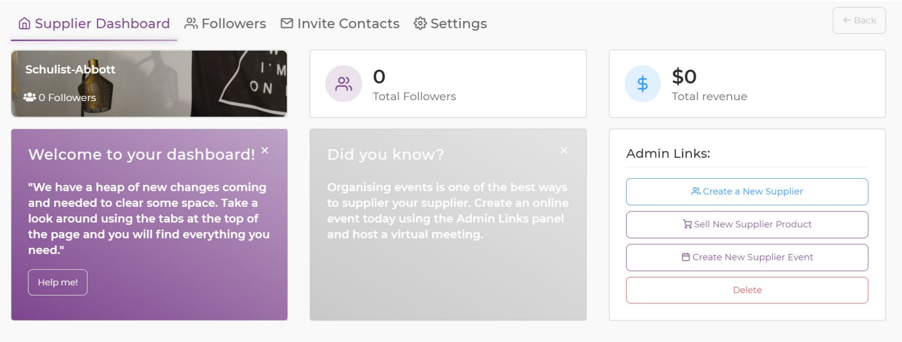
- **Title:** This is the name of the Supplier.
- **Featured**: If selecting yes
- **Description:** Provide a clear overview of what your business does.
- **Contact Information**: Make it clear how users can get in contact with you and include all contact avenues.
- **Privacy**: If you want your business to be shown publicly in the Business Directory, choose Public. If choosing private, users will need to send a request to join your page.
- **Avatar**: Upload a small avatar image for your page, we recommend 250px x 250px.
- **Cover Image:** Upload a main cover image, we recommend 900px x 225px.
- **Category:** Choose the most appropriate as this will assist users to search and locate you more easily.
- **Topic:** Choose the Topic that best suits your business.

Supplier Page Dashboard – User View

The next step is to head to the admin area for your Supplier Page. You can find this button on your Supplier page in the top right corner and select **Admin.** This button is only visible to Group Administrators.

On this page you will see a snapshot of your Supplier Page. You also have some additional functions that will allow you to **Sell New Supplier Product or Create New Supplier Event.** Selecting either of these options, will list these services against your Page and also display them in the Main Store and Events Directory, unless you make your page private.

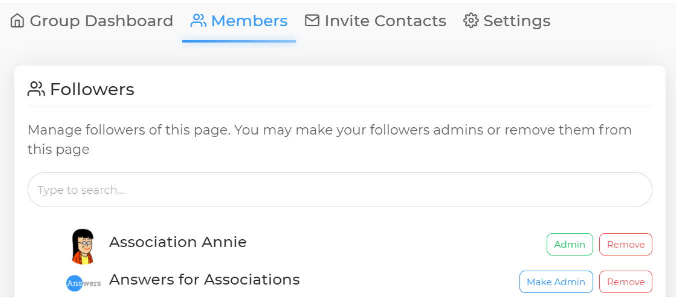
If you are done with your page you can press the “delete” button but be aware, once it’s gone it’s gone!



Manage Your Members/Followers, Assign Admin Roles – User View

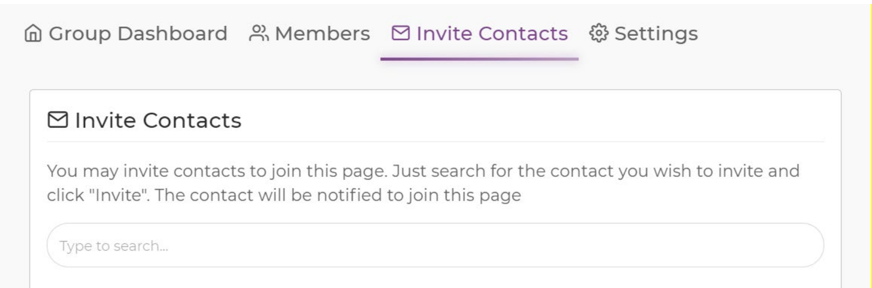
Within the Supplier **Admin**, click on the **Members** tab. This screen gives you the option to remove group members or promote them to be an administrator with you. To do this, you need to click into the **Search box** and type their name and once located, click **Admin** or **Remove**.

Assigning an Admin role will allow that user to post on behalf of the group, Edit the Group details, Assign new Admin roles and Remove users from the group.



Invite Contacts – User View

Within the Supplier **Admin**, click on the **Invite Contacts** tab. This screen gives you the option to invite new contacts to join your page. To do this, you need to click into the **Search box** and type their name and once located, click invite. They will then be notified by email and will have the choice to Accept or Decline your invite.



Create a First Post – User View

Now that your community is up and running, one of the first steps is to make your first post! Of course, with no other followers yet you'll be the only one who sees it however before long you'll have people coming to look at your page and having a post there first is a great way to make them feel welcome.

To do this, click into the post box and start writing, you may consider adding an image (or a whole gallery) to make your post really stand out.

Upload a Resource to a Supplier Page

From within the Supplier page, click on the **Resource tab**, select **Create New Resource,** and complete all necessary fields and select **Save**. The Resource will immediately appear within the Supplier Resources tab and also show in the Master Resource directory.

Upload a Video to a Supplier Page

From within the Supplier page, click on the **Video tab**, select **Create New Video,** and complete all necessary fields and select **Save**. The Video will immediately appear within the Supplier Video tab and also show in the Master Video directory.

Upload an Event to a Supplier Page.

From within the Supplier page, click on the **Event tab**, select **Create New Event,** and complete all necessary fields and select **Save**. The Event will immediately appear within the Supplier Event tab and also show in the Master Events directory.

Update Page Details – User View

From within the Supplier page, click on the **Settings** tab at the top of the page and you'll be taken to your page settings where you can update the details you entered when you created your group.

You can also change your group between public (open and public for all users) or Private (no one can see your posts or content until they are approved to be a follower).

Newsfeed

The purpose of the Newsfeed

The News Feed is a constantly updating list of posts and questions in the middle of your home page. The newsfeed includes a mix of posts, community questions, photos, links, and likes from people, Pages, and groups that you follow in the community.

To the left of the Newsfeed are the Services available to the community, along with the Help section.

Each community is different, however to the right of the newsfeed is the Top Community Questions, Featured Events and Top Posts This Week.

In the top-right the users name and organisation is displayed next to their avatar. The dropdown box gives a user access to their cart, contact, profile, subscriptions, and seller account.

Community Q&A

Top Community Questions – User View

If a user has a Question that they are looking for some support from their peers, they can make an **Ask the Community** Post which will be displayed across all users Newsfeed. This way users can click **View This Question** and provide their response, add a comment, ask for clarification or vote for certain responses.

This can be done in the Newsfeed by creating a new post and selecting **Ask the Community** and filling out each field and selecting **Post Question**.

The Question will then appear in the Top Community Questions for quick access and each time another user comments, the original poster will received an email and community notification.

Questions Dashboard – Admin View

To access this, navigate to **Admin**>**Services**>**Community Q&A>Questions.** From here you can see a full list of all questions that have been asked by the community. You can also search for a particular question, **Show** or **Delete** a question or export the list to **Excel**, **CSV**, **PDF** or **Print**.

Questions Tags Dashboard – Admin View

To access this, navigate to **Admin**>**Services**>**Community Q&A>Tags.** From here you can see a full list of all question tags which are used to allow user to label their question i.e., membership, sponsorship.

You can also create a New Question Tag, by selecting **Create New Question Tag** and completing the fields and selecting **Save**. These tags will be instantly available for users to use when posting their question.

You can also search for a particular tag, **Edit** or **Delete** a question or export the list to **Excel**, **CSV**, **PDF** or **Print**.

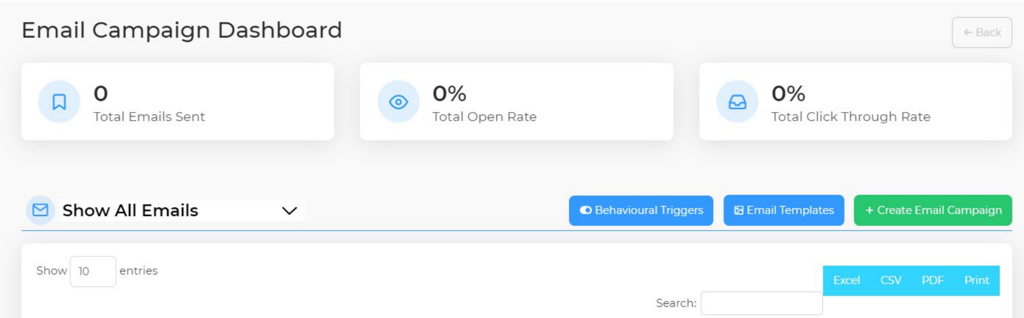
Marketing Automation

Email Campaign Dashboard – Admin View (only)

To access this, navigate to **Admin**>**Services**>**Marketing>Email Marketing.** From here you can see the Email Campaign Dashboard which provides an overview of the Total **Email Sent, Total Open Rate** and **Total Click Through Rate.**

You can also search for a particular email or export the list to **Excel**, **CSV**, **PDF** or **Print**.

You can also choose from the dropdown box to see **Show All Emails** or **Show Automated Emails**.



Create Email Campaign – Admin View (only)

This feature is used to send email communications to your community users. Your can schedule your emails or send them immediately.

To set this up, navigate to **Admin>Services>Marketing>Email Marketing>Create Email Campaign.**

From here complete the below fields:

- **Name:** This is for your records, not shown to the end user
- **Subject:** Enter the subject line of the email
- **Content**: Enter the content of your email. You can also add tags i.e., first name and username. You can also access additional formatting, hyperlinking and more.
- **Choose Your Template**: Choose the appropriate email template that suits the style of messaging.
- **Select Your Time**: You can chose between
    - Send Email Immediately
    - Send Email at a Specific Date/Time
    - Send Email Based on Behavioural Triggers – see below for more on this.
- **Select Your Audience**: Choose the appropriate audience for who will receive this email.

It's recommend that you send a Test Email to yourself before sending.

Create Email Behavioural Triggers– Admin View (only)

This feature is used to automate the email communications to your community users and is usually comprised of a series of emails which are sent automatically to a specific audience after a they take a specific action ie. After a member joins the community, you can set-up an automated email to Welcome them to the community and give them tips on what to do next.

To set this up, navigate to Admin>Services>Marketing>Email Marketing>Create Email Behavioural Triggers.

From here complete the below fields:

- **Name:** This is for your records so that you can search for it easily and is not shown to the user.
- **Subject:** Enter the subject line of the email
- **Content**: Enter the content of your email. You can also add tags i.e., first name and username. You can also access additional formatting, hyperlinking and more.
- **Choose Your Template**: Choose the appropriate email template that suits the style of messaging.
- **Select Your Time**: Select **Send Email Based on Behavioural Triggers.**
- **Select Your Audience**: Choose the appropriate audience for who will receive this email.
- **Send Email in**: Choose the appropriate time and then select whether it's minutes, hours, days, week, or month.

It's recommend that you send a Test Email to yourself before sending.

Email Digest – Admin View (only)

To access this, navigate to **Admin**>**Services**>**Marketing>Email Digests.** From here you can see the **Email Digest** Dashboard which shows a list of all Email Templates for each service ie Q&A, Jobs, Groups, Events – see below.

You can also search for a particular email template, View, Edit or Delete an individual email or export the list to **Excel**, **CSV**, **PDF** or **Print**.

Trybz.
find your tribe

Email Digests Dashboard

← Back

All Email Digests

+ Add Email Digest

Show 10 entries

Excel CSV PDF Print

Search:

ID	Title	Interval	Interval Period	Last Sent	Next Scheduled Send	Audience	Published	
1	Q & A	Weekly	Every Monday			All Members	×	View Edit Delete
2	Jobs	Weekly	Every Monday			All Members	×	View Edit Delete
3	Groups	Weekly	Every Monday			All Members	×	View Edit Delete
4	Events	Weekly	Every Monday			All Members	×	View Edit Delete
5	Suppliers	Weekly	Every Monday			All Members	×	View Edit Delete
6	Store	Weekly	Every Monday			All Members	×	View Edit Delete
7	Resources	Weekly	Every Monday			All Members	×	View Edit Delete
8	Video	Weekly	Every Monday			All Members	×	View Edit Delete
9	Multiple	Weekly	Every Monday			All Members	×	View Edit Delete

Create Email Digest – Admin View (only)

To create a new email digest, select **Add Email Digest** and complete each of the fields. See below for an example of what a digest email looks like.

- **Title:** This is for your records so that you can search for it easily and is not shown to the user.
- **Subject:** This is the subject line for the email
- **Opening Paragraph:** This comes before the service highlights and introduces the email to the user.
- **Closing Paragraph:** This comes after the highlights, along with your email footer.
- **Select a service to include in your email digest:** Choose which service you want included in your email. You can choose multiple.
- **Items:** Choose the number of items per service to be displayed in the email. Minimum of 2
- **Send Every**: Choose from Day, Week, Fortnight or Month.
- **Day of Week:** Choose which day of the week you want you email sent on.
- **Time to Send**: Choose the time of day you want your email sent.
- **Audience**: Select the users you want to send this email to.
- **Publish**: Once you are ready to send this email, tick this box and the email will be sent.

It's recommend that you send a Test Email to yourself before sending.

Example

Hi Angela,

Below are the latest questions being asked by association professionals in the Community. Can you share your expertise by answering one or more of these?

- *Question 1 – Short Description*
- *Question 2 – Short Description*
- *Question 3 – Short Description*

Your communication preferences are set for you to receive a digest of submitted questions once a week. You can update your preferences anytime by clicking this link.

Happy reading!

Stripe

Stripe Coupons

Coupons in Stripe provide discounts on recurring charges, like subscriptions and event registrations and allow for great flexibility in how you define and use them. You can even define a coupon that must be redeemed by a certain date or is limited to a set number of redemptions (across all of your customers). They can:

- Apply to every invoice, just one invoice, or for a certain length of time.
- Reduce invoices by a percentage or a flat amount.
- Apply to every subscription a customer has or only specific ones.

Stripe Coupon Durations

A coupon's duration applies on a per-customer or per-subscription basis, starting when the coupon is applied to the customer or subscription. For example, a coupon with a four-month duration applies to the first four months of a customer's monthly subscription. If the subscription is yearly, the coupon is applied to the full invoice for the first year. And for a weekly subscription, a four-month coupon applies to every invoice in the first four months.

Add Stripe Discounts for one-time Payments

Reduce the amount charged to a customer by discounting their subtotal with coupons and promotion codes.
You can use discounts in Checkout to reduce the amount charged to a customer for one-time payments. Coupons and promotion codes allow for great flexibility in how you define and use them. They can:

- Apply a discount to the entire subtotal or specific products.
- Reduce the total charged by a percentage or a flat amount.
- Create customer-facing promotion codes on top of coupons to share directly with customers.

How to Create a Stripe Coupon

You will need to separately log into your Stripe Dashboard and navigate to **Products,** then **Coupons**. Then fill in the necessary fields.

- **Name**: This will appear on the customers receipts and invoices.
- **ID**: Leave this field blank.
- **Percentage Discount**: Choose this option if you want to provide a partial discount i.e. 50% off their purchase price.
- **Fixed Amount Discount**: Choose this amount if you want to provide a fixed dollar discount i.e. $50 off their purchase price.
- **Apply to Specific Products**: Turning this option on, allows you to create coupons for certain subscription levels.
- **Duration**: For subscriptions and customers, this determines how long this coupon will apply once redeemed. i.e., Forever, Once, Multiple Months

- **Limited the date rang when customers can redeem this coupon:** Choose this option if you want to create an expiry date of when you want your members to user this coupon by i.e. 50% discount to all events as part of their Annual membership which expires on the 31st December 2021.
- **Limit the total number of times this coupon can be redeemed:** Chose this option if you want to limit the number of times this coupon can be redeemed.
- **User Customer Facing Coupons:** Use this option to create visually friendly coupon codes ie. 2021FreeEvent

You can create as many coupon codes as needed. When giving your members coupon codes, they will need to enter the discount code at the checkout screen and select apply. The discount will immediately take effect.