

Member Portal

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The Member Portal allows people to purchase and manage their memberships, including joining, canceling and renewing, and enrolling for courses. They can see upcoming events and have access to any exclusive members-only content you've created.

Details

As for all apps/portals, you need to set up a name, Alias (URL), brand, live dates, and messaging for before and after the app is live. [Read this article for more information.](#)

Localization

Changing the wording in the app/portal

Changes made to the default language in Application Settings will affect all events. However, you can still make unique local changes for each portal in each event in the Portal Setup. [Read more about Localization.](#)

Content Tab Settings

- **Home Page** – a simple welcome page where you can include any necessary instructions, or messages to all members
- **Search Page** — Lets you choose which CE Course classifications to include in the search feature. This section also lets you limit the number of search results, and manage button text and text on the page.
- **Join Page** — Lets you define content and links to a Join Interactive Site
- **Shopping Cart Page**– also includes:
 - Number of Suggested Courses to show – by default, this list will show 10 Suggested Courses.
 - Payment Interactive Site – choose the existing Interactive Site that will be used for Payments.
 - Confirmation Email Merge Doc – choose the Merge Doc that will be used for Confirmation Emails.
 - Enable Discount Codes – Enable discounts to work in the portal when purchasing
 - Enable Waitlist – if an item's inventory level is getting low, you can choose to put further bookings on the Waitlist. Then, one of your staff can later use the [Waitlist Management Express Action](#) to manually choose which people on the Waitlist should receive tickets. To learn more about Waitlists, see our article on [Waitlist Management](#).
- **Calendar Page** — you can define headings and buttons here and allow members to register after start date.

- **Sign-in Page** — lets you modify headings, page text, navigation text and link to a New Account Interactive Site
 - **Update Details Page**— also includes:
 - Update Details Interactive Site – choose the existing Interactive Site that will be used to Update Details.
 - **Upcoming Events Page** – You can define any headings or text you would like present.
 - **Event History Page** – You can define any headings or text you would like present.
 - **Credits Page**— also includes:
 - Use Certificate report from Event Setup
 - Module – this field narrows down the list of reports for the next setting, Certificate Report.
 - Certificate Report – choose any report to print under Certificate on the Credits Page.
 - **Event Detail Popup** – define any headings or text for the pop-up.
 - **Member Renewal** — lets you manage content and link to a Payment Interactive Form
 - **Member History**
 - **Generic Buttons and Labels** – Set the text for buttons that will be found in your portal
 - **Content Page 1-10** – You have the option to add, up to, an additional 10 pages to the portal. Pages visibility can be filtered by membership status and each page can either be a single page or sub-page with up to 10 additional sub-pages
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