



InstaMember USER'S GUIDE

Setting Up Form Editor Options

This guide will help you learn how to setup different forms on your InstaMember powered site which includes: registration form, affiliate registration form, edit profile and login forms. This also contains detailed information on the settings and options that you can use according to your preferences.

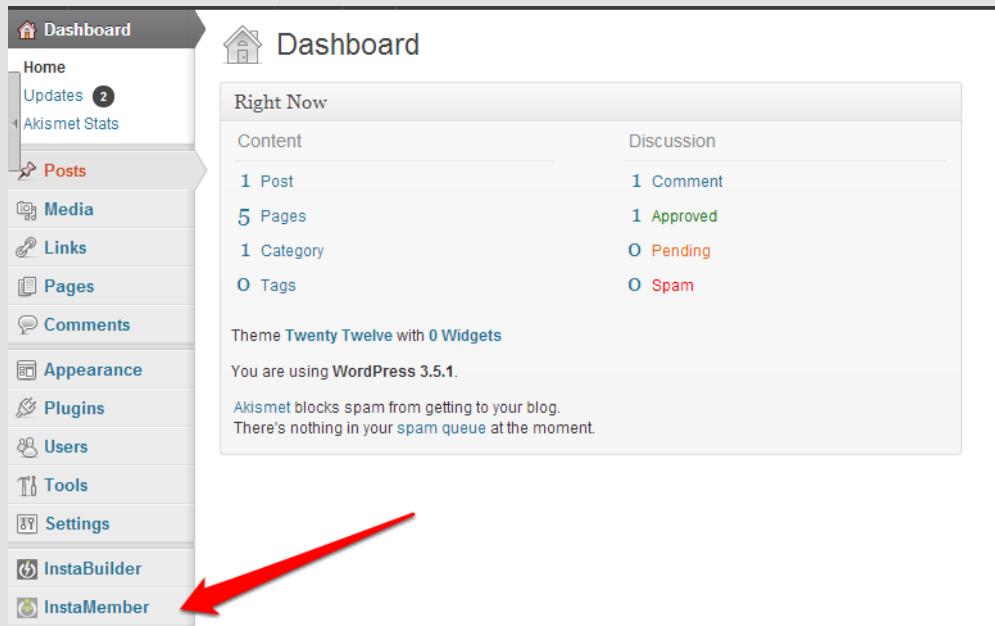
TABLE OF CONTENTS

Title Page	1
Introductory Page	2
Table of Contents	3
Setting Up Form Editor Options	4
Editing the Membership Registration Form	6
Editing the Affiliate Registration Form	8
Editing the Edit Profile Form	10
Editing the Member Login Form	12
Credits & Contact Page	14

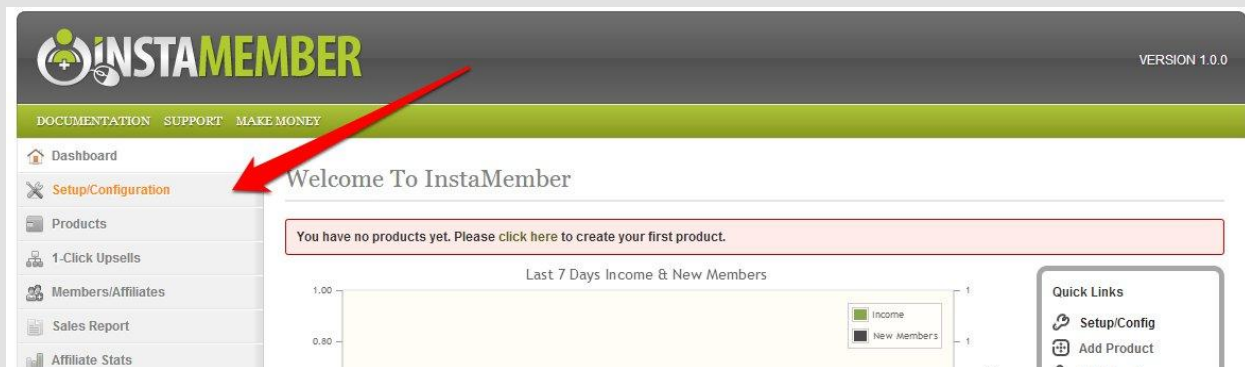
Setting Up Form Editor Options

This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site.


1. Navigate to your Instamember Dashboard by clicking the **Instamember** menu option on your wordpress dashboard.



2. Click '**Setup/Configuration**' to start setting up your InstaMember powered site.



3. Once clicked, you should see the setup/configuration page similar to this image


VERSION 1.0.0

DOCUMENTATION SUPPORT MAKE MONEY

- Dashboard
- Setup/Configuration**
- Products
- 1-Click Upsells
- Members/Affiliates
- Sales Report
- Affiliate Stats
- Manage Licenses
- Support Desk
- Broadcast Emails
- Membership URLs

Config Menu: **General** Payments Email Integration Form Editor Block Email/IP

Basic Configuration

Business Name
Please enter your business name.


Business Address
Please enter your business address.

Membership Configuration

Currency

Membership Handler Page

4. Click the 'Form Editor' button.


VERSION 1.10

DOCUMENTATION SUPPORT MAKE MONEY

- Dashboard
- Setup/Configuration**
- Products
- 1-Click Upsells
- Members/Affiliates
- Sales Report
- Affiliate Stats
- Manage Licenses
- Support Desk
- Broadcast Emails
- Membership URLs

Config Menu: General Payments Email Integration **Form Editor** Block Email/IP

Form Editor

#	Form Title	Type	Edit
1	Membership Registration	Signup Form	Edit
2	Affiliate Registration	Affiliate Signup Form	Edit
2	Edit Profile	Profile Form	Edit
2	Member Login	Login Form	Edit
#	Form Title	Type	Edit

Note: Unlike the other options page, form editor does not have the update settings button. Instead, the button appears on each of the forms listed as you edit each of those.

- **Membership Registration** – this is the registration form containing all the required fields to be supplied for the registration process. Click **Edit** to start editing the form according to your preferences.

- **Affiliate Registration** - this is the affiliate registration form containing all the required fields to be supplied for the affiliate registration process. Click **Edit** to start editing the form according to your preferences.
- **Edit Profile** – this form holds the fields that can be edited by the members in case there are modifications they want for their individual profiles. Click **Edit** to start editing the form according to your preferences.
- **Member Login** – this form holds the fields that are required for the members to login/sign in to the members' area. Click **Edit** to start editing the form according to your preferences.

Editing the Membership Registration Form

This guide assumes that you already have clicked the edit link of membership registration in the form editor page.

Edit Form

Type

Signup Form

* Form Title

Membership Registration

Text Before Form (optional)

You can enter any content you wish before the form. All line-breaks will be automatically convert to paragraphs. Allowed HTML tags:
<u><i><a><div>

Text After Form (optional)

You can enter any content you wish after the form. All line-breaks will be automatically convert to paragraphs. Allowed HTML tags:
<u><i><a><div>

* Button Label

Next Step

Form Fields

Simply drag n drop to arrange the fields order

↓

Username Field - Label: Username

☒ (required)

↓

Password Field - Label: Password

☒ (required)

✖

↓

Email Address Field - Label: Email Address

☒ (required)

↓

First Name Field - Label: First Name

☐ (required)

✖

↓

Last Name Field - Label: Last Name

☐ (required)

✖

Note: If "Password Field" is removed, InstaMember will auto-generate password for the new member(s).

Add Field(s)

Title

Street Address

City

State

Country

Zip Code

Phone

Company

Gender

Site URL

Enable Terms & Conditions

☐ OFF

By enabling this option, customers/visitors will have to agree to your "Terms & Conditions" to register.

Enable reCaptcha

☐ OFF

In order to use this feature, you have to integrate InstaMember with reCaptcha first on InstaMember -> Configuration.

Update Form

Back

1. Fill in the **Form Title** text field with your desired registration form title. You can't leave this blank as this is required. This has already been filled out by default.
2. **Text Before Form (optional)** – this field is optional. However, if you want to display any content (introductions, instruction or description), it will appear above the elements of your form. Line breaks, `
` or `
`, will automatically converted into paragraphs. This field supports the following html tags only:
`<u><i><a><div>`
3. **Text After Form (optional)** – this field is optional. However, if you want to display any content (notes, reminders or further instructions), it will appear after the last element of your form. Line breaks, `
` or `
`, will automatically converted into paragraphs. This field supports the following html tags only:
`<u><i><a><div>`
4. **Button Label** – this field is required. This corresponds the value="" of your form. Whatever text you put in here will appear on the button of your registration form.

5. **Form Fields** – these are the fields that the registrant has to supply information to complete registration. It has a drag and drop function so you are free to re-arrange the fields according to your preference and a checkbox for you to make a specific field required or optional. Furthermore, you can add more fields by simply clicking any form fields available inside the **Add Fields(s)** box.
6. **Enable Terms & Conditions** – by default this option is turned off. Turn it on if you want the registrants to accept your terms and conditions. Once turned on, a new field will appear which you have to supply with the url of where the terms and condition is located.
7. **Enable reCaptcha** – by default this option is turned off. Turn it on if you want to add a captcha to your registration form. Note: *In order to use this feature, you must first setup the integration option under setup/configuration page.*
8. Once done with the changes, you may now save or update the changes you made by clicking the update settings button. Otherwise, you may click the back button to discard the changes.

Editing the Affiliate Registration Form

This guide assumes that you already have clicked the edit link of affiliate registration in the form editor page.

Edit Form

Type

Affiliate Form

* Form Title

Affiliate Registration

Text Before Form (optional)

You can enter any content you wish before the form. All line-breaks will be automatically convert to paragraphs. Allowed HTML tags: `<u><i><a><div>`

Text After Form (optional)

You can enter any content you wish after the form. All line-breaks will be automatically convert to paragraphs. Allowed HTML tags: `<u><i><a><div>`

* Button Label

Register

Form Fields

Simply drag n drop to arrange the fields order

↓

Username Field - Label: Username

☒ (required)

↓

Password Field - Label: Password

☒ (required)

✖

↓

Email Address Field - Label: Email Address

☒ (required)

↓

First Name Field - Label: First Name

☐ (required)

✖

↓

Last Name Field - Label: Last Name

☐ (required)

✖

Note: If "Password Field" is removed, InstaMember will auto-generate password for the new member(s).

Add Field(s)

Title

Street Address

City

State

Country

Zip Code

Phone

Company

Gender

Site URL

Enable Terms & Conditions

☐ OFF

By enabling this option, customers/visitors will have to agree to your "Terms & Conditions" to register.

Enable reCaptcha

☐ OFF

In order to use this feature, you have to integrate InstaMember with reCaptcha first on InstaMember -> Configuration.

Update Form

Back

1. Fill in the **Form Title** text field with your desired affiliate registration form title. You can't leave this blank as this is required. This has already been filled out by default.
2. **Text Before Form (optional)** – this field is optional. However, if you want to display any content (introductions, instruction or description), it will appear above the elements of your form. Line breaks, `
` or `
`, will automatically converted into paragraphs. This field supports the following html tags only:
`<u><i><a><div>`
3. **Text After Form (optional)** – this field is optional. However, if you want to display any content (notes, reminders or further instructions), it will appear after the last element of your form. Line breaks, `
` or `
`, will automatically converted into paragraphs. This field supports the following html tags only:
`<u><i><a><div>`
4. **Button Label** – this field is required. This corresponds the value="" of your form. Whatever text you put in here will appear on the button of your affiliate registration form.

5. **Form Fields** – these are the fields that the affiliate registrant has to supply information to complete registration. It has a drag and drop function so you are free to re-arrange the fields according to your preference and a checkbox for you to make a specific field required or optional. Furthermore, you can add more fields by simply clicking any form fields available inside the **Add Fields(s)** box.
6. **Enable Terms & Conditions** – by default this option is turned off. Turn it on if you want the affiliate registrants to accept your terms and conditions. Once turned on, a new field will appear which you have to supply with the url of where the terms and condition is located.
7. **Enable reCaptcha** – by default this option is turned off. Turn it on if you want to add a captcha to your affiliate registration form. Note: *In order to use this feature, you must first setup the integration option under setup/configuration page.*
8. Once done with the changes, you may now save or update the changes you made by clicking the update settings button. Otherwise, you may click the back button to discard the changes.

Editing the Edit Profile Form

This guide assumes that you already have clicked the edit link of edit profile in the form editor page.

Edit Form

Type

Profile Form

* Form Title

Edit Profile

Text Before Form (optional)

You can enter any content you wish before the form. All line-breaks will be automatically convert to paragraphs. Allowed HTML tags: `<u><i><a><div>`

Text After Form (optional)

You can enter any content you wish after the form. All line-breaks will be automatically convert to paragraphs. Allowed HTML tags: `<u><i><a><div>`

* Button Label

Update Profile

Form Fields

Simply drag n drop to arrange the fields order

Email Address Field - Label: Email Address ☒ (required)

First Name Field - Label: First Name ☒ (required)

Last Name Field - Label: Last Name ☒ (required)

Street Address Field - Label: Street Address ☐ (required)

City Field - Label: City ☐ (required)

State Field - Label: State ☐ (required)

Country Field - Label: Country ☐ (required)

Zip Code Field - Label: Zip Code ☐ (required)

Note: "Username" and "Change Password" fields will be exists by default.

Add Field(s)

Title

Phone

Company

Gender

Enable Affiliate Network Integration ☐ OFF

If you want

Update Form

Back

1. Fill in the **Form Title** text field with your desired edit profile form title. You can't leave this blank as this is required. This has already been filled out by default.
2. **Text Before Form (optional)** – this field is optional. However, if you want to display any content (introductions, instruction or description), it will appear above the elements of your form. Line breaks, `
` or `
`, will automatically converted into paragraphs. This field supports the following html tags only:
`<u><i><a><div>`
3. **Text After Form (optional)** – this field is optional. However, if you want to display any content (notes, reminders or further instructions), it will appear after the last element of your form. Line breaks, `
` or `
`, will automatically converted into paragraphs. This field supports the following html tags only:
`<u><i><a><div>`
4. **Button Label** – this field is required. This corresponds the value="" of your form. Whatever text you put in here will appear on the button of your edit profile form.

5. **Form Fields** – these are the fields that the members are allowed to edit. It has a drag and drop function so you are free to re-arrange the fields according to your preference and a checkbox for you to make a specific field required or optional. Furthermore, you can add more fields by simple clicking any form fields available inside the **Add Fields(s)** box.
6. **Enable Affiliate Network Integration** – by default this is turned off. However, if turned on, this will enable affiliate network integration to that member's account.
7. Once done with the changes, you may now save or update the changes you made by clicking the update settings button. Otherwise, you may click the back button to discard the changes.

Editing the Member Login Form

This guide assumes that you already have clicked the edit link of member login in the form editor page.

Edit Form

Type

Login Form

* Form Title

Member Login

Text Before Form (optional)

You can enter any content you wish before the form. All line-breaks will be automatically convert to paragraphs. Allowed HTML tags:
<u><i><a><div>

Text After Form (optional)

You can enter any content you wish after the form. All line-breaks will be automatically convert to paragraphs. Allowed HTML tags:
<u><i><a><div>

* Button Label

Update Form

Back

1. Fill in the **Form Title** text field with your desired member login form title. You can't leave this blank as this is required. This has already been filled out by default.
2. **Text Before Form (optional)** – this field is optional. However, if you want to display any content (introductions, instruction or description), it will appear above the elements of your form. Line breaks, `
` or `
`, will automatically converted into paragraphs. This field supports the following html tags only:
`<u><i><a><div>`
3. **Text After Form (optional)** – this field is optional. However, if you want to display any content (notes, reminders or further instructions), it will appear after the last element of your form. Line breaks, `
` or `
`, will automatically converted into paragraphs. This field supports the following html tags only:
`<u><i><a><div>`
4. **Button Label** – this field is required. This corresponds the value="" of your form. Whatever text you put in here will appear on the button of your member login form.
5. Once done with the changes, you may now save or update the changes you made by clicking the update settings button. Otherwise, you may click the back button to discard the changes.

BROUGHT TO YOU BY: SUZANNA THERESIA

If you have any questions or input on how we could improve this manual, please contact our support team at <http://asksuzannatheresia.com>