



# InstaMember USER'S GUIDE

## Members/Affiliates Options

## Members/Affiliates Options

This guide contains detail information on the **Members/Affiliates Options** including the settings, options and how to navigate into this page to manage members and affiliates of your InstaMember powered site.

# TABLE OF CONTENTS

<b>Title Page</b>	<b>1</b>
<b>Introductory Page</b>	<b>2</b>
<b>Table of Contents</b>	<b>3</b>
<b>Members/Affiliates Options</b>	<b>4</b>
<b>Credits &amp; Contact Page</b>	<b>10</b>

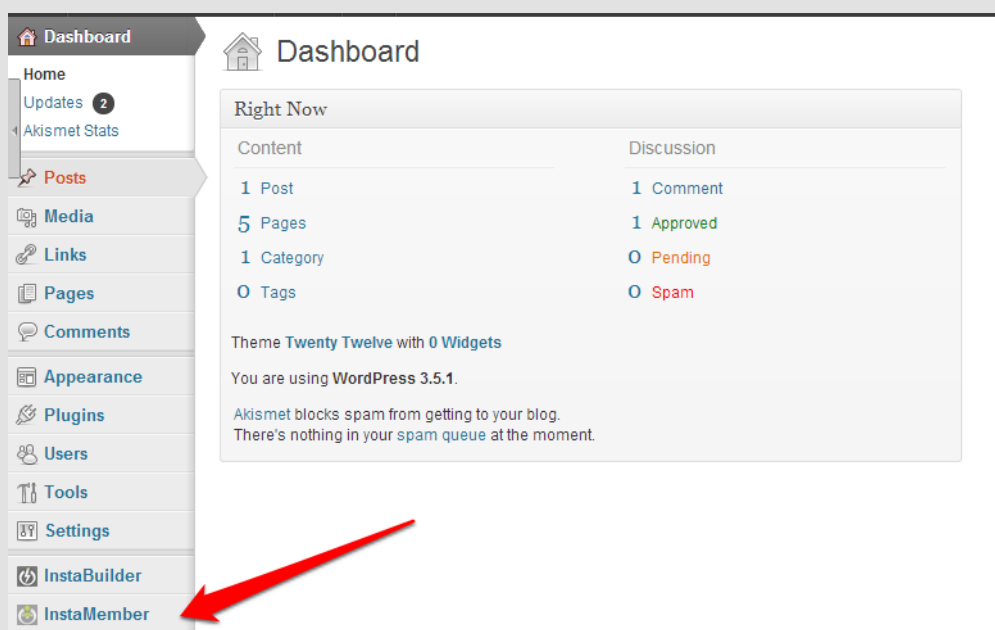
## Members/Affiliates Options

*This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site and that you already have setup your products and optionally the forms section under **Setup/Configuration** page.*

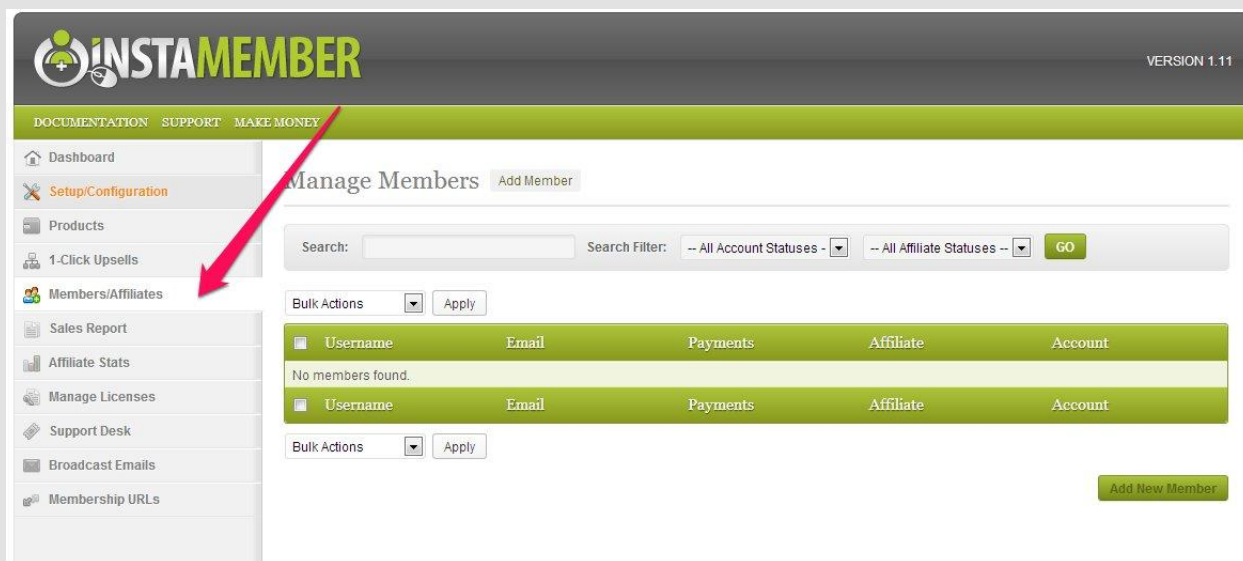
The **Members/Affiliates** option is where you can manage the members and affiliates of your products. It is a feature of InstaMember that enables the administrator to member for instances like payment registration link were not received add or remove a member if for whatever purpose the administrator thinks it is applicable such as violation of the terms and the policy of the site.

It comes with a search and search filter options to make the navigation and member/affiliate management easier and faster to do.

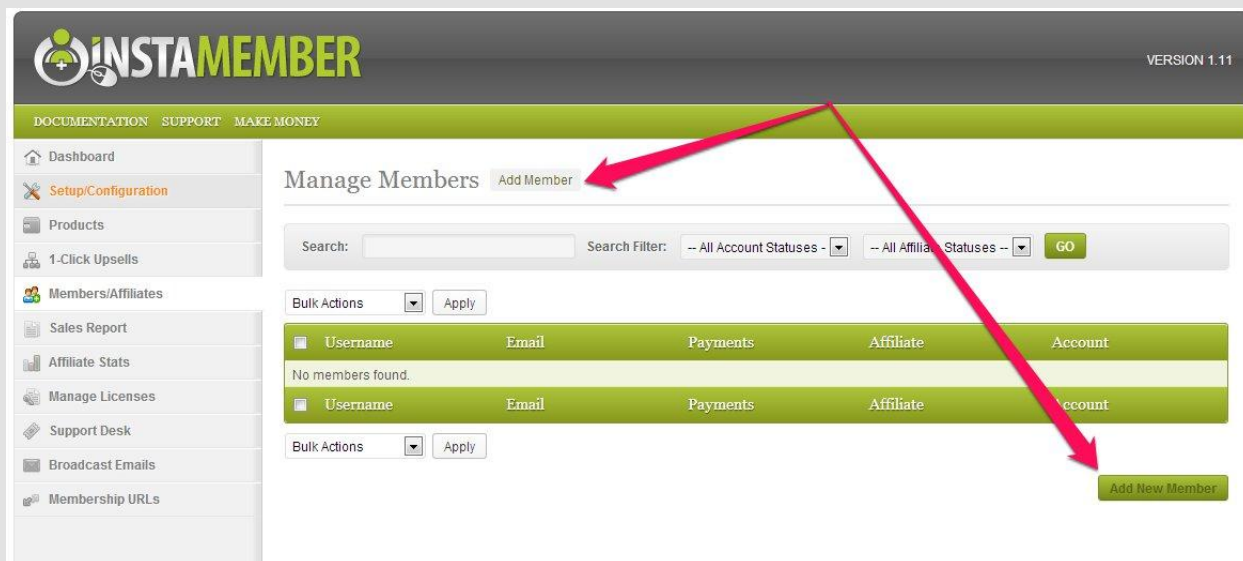
1. Navigate to your Instamember Dashboard by clicking the **Instamember** menu option on your wordpress dashboard.



2. Click the '**Members/Affiliates**' option.



3. To add a member, simply click the **Add Member** link beside **Manage Members** headline or click the green **Add New Member** button.



4. Once clicked, a page will load that would look exactly like the image below.

## Add New Member

\* Username

\* Email Address

\* Password

\* Confirm Password

Title

Full Name

Street Address

City

State

ZIP Code

Country

Phone

Gender

Company

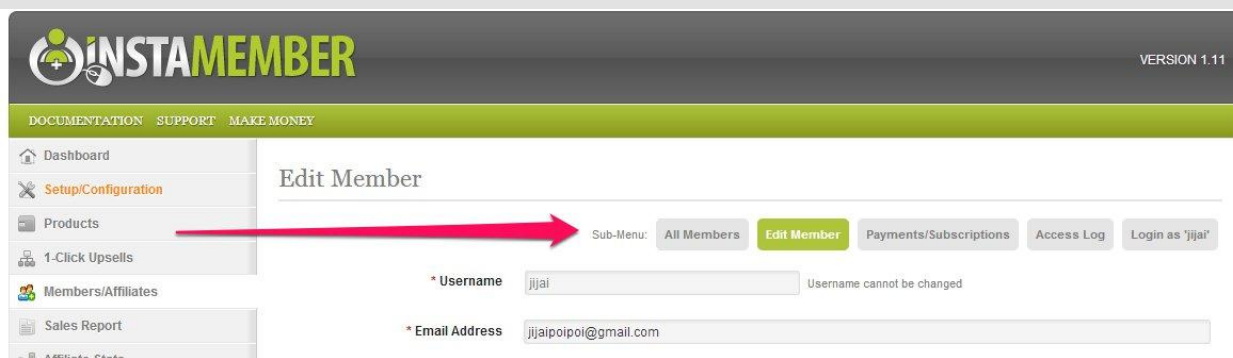
Affiliate Status

Payment/Subscription

☐ Send welcome email to this member

Save Member Cancel

- Fill in the required fields (username, email address, password, confirm password). The newly created member can then edit his/her profile once the required fields are setup for him. You may optionally check the **Send Welcome Email to this Member** checkbox if you would like to especially if it contains special instructions for new members. Click **Save Member** button to finish and add the new member.  
Note: After creating/saving a new member via this option, the page then will be refreshed and sub-menus will appear on the top portion of the page to further give you the option to manage the account.



- Clicking **All Members** tab, you will be taken back to the overview of the Members/Affiliates options page where all members and affiliates are listed in.
- By default, the tab you will be taken into after successfully adding or saving a member is the **Edit Member** tab where you can add or edit existing information of the newly added client.
- The **Payments/Subscriptions** tab is where you can access the payment and subscription data of the client. It is where you can check the existing subscription of the client. This is also where you can manually add a payment for that specific member for whatever cases it would be applicable.
- The **Access Log** tab is an option for the administrator to check how many times that the user has logged in using his or her account.
- The last tab, **Login as '(client username)'** is an option where the administrator can log in into the site using the account and credentials of that particular member.

Note: These options are available on the **Members/Affiliates** page overview as links below the username.

6. To delete a specific user, you can simply click the delete link just below the username of the member.

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

## Manage Members

Add Member

Search:

Search Filter: -- All Account Statuses - -- All Affiliate Statuses --

GO

Bulk Actions

Apply

1 item

<input type="checkbox"/>	Username	Email	Payments	Affiliate	Account
<input type="checkbox"/>	jijai	jijaipoipoi@gmail.com	100.00	No	Active

Bulk Actions

Apply

1 item

Add New Member

Export to CSV

Or you can make use of the bulk action. First check the checkbox corresponding to the member(s) that you wanted deleted, then from the bulk actions dropdown, select delete member and click apply to implement the action.

Dashboard

Setup/Configuration

Products

1-Click Upsells

Members/Affiliates

Sales Report

Affiliate Stats

Manage Licenses

Support Desk

Broadcast Emails

Membership URLs

## Manage Members

Add Member

Search:

Search Filter: -- All Account Statuses - -- All Affiliate Statuses --

GO

Delete Member

Apply

1 item

<input type="checkbox"/>	Username	Email	Payments	Affiliate	Account
<input checked="" type="checkbox"/>	jijai	jijaipoipoi@gmail.com	None	No	Active

Bulk Actions

Apply

1 item

Add New Member

Export to CSV

You have also the option to export all existing members to your site by simply clicking the **Export CSV** button just beside the green **Add New Member** button.

8



Dashboard

Setup/Configuration

Products

1-Click Upsells

Members/Affiliates

Sales Report

Affiliate Stats

Manage Licenses

Support Desk

Broadcast Emails

Membership URLs

## Manage Members

Add Member

Search:

Search Filter: -- All Account Statuses - -- All Affiliate Statuses --

GO

Delete Member

Apply

1 item

	Username	Email	Payments	Affiliate	Account
<input checked="" type="checkbox"/>	jjjal	jjjalpolpoi@gmail.com	None	No	Active

Bulk Actions

Apply

1 item

Add New Member

Export to CSV

## **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>