

# The Member Wizard Web Template Handbook



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# Working with the Member Wizard Web Template

The Member Wizard Web template is designed to give organisations a clean, good looking website with all the functionality they need to manage their requirements while at the same time being simple enough so someone without web programming knowledge can easily design and maintain it.

In order to manage your website, your Member Wizard **User** name must have been given **Full Web Site access** for the **Role** attached to your **User** login. Having said that you do not need to have a Member Wizard subscription. Member Wizard provides free accounts if there are less than 30 members in your database so if you only want to use the website component of Member Wizard you can do so easily and inexpensively.

## How to obtain a Member Wizard website template URL

If you would like to try designing your own site and do not have a current **Member Wizard** account with us click the **Free Trial** button on our website and provide your preferred login name and the name of your organisation. You will be sent a link with a temporary password. Once you have logged into Member Wizard and as the first login account you will have **Administrator** rights to your account which includes full web access rights.

Click on the **Website** menu item and check the box which says Yes I would like to transfer our website to the Member Wizard website. Don't worry this will not cause anything to change in your current web arrangements - it just allows you to send us a request. We will then forward you a temporary URL you can use to access your new website and design it to suit yourself. Once a template is added to your database you will also be able to access it via the **Website** menu item in your **Admin Portal**.

When you are happy with the design you then need to contact us and we will start the process of making the website publicly available. This may entail either transferring your current web domain to the new site or inserting a redirection on your current web domain to send people to the new site.

## How much does the Web Template cost?

When your website is first published there is an initial set up and hosting charge for the first year of \$450 plus GST charged. Subsequent years the charge is only \$150 plus GST.

Included in this charge are 3 Zoom training sessions with our web support member which can be booked from our home page on the **Book a Zoom** link at the top of the page. If you require more than 3 sessions they will be charged at \$50 per hour plus GST.

Also included in this charge is the cost of hosting your website and also your domain (only if it is moved from its original hosting location). We will also include the cost of obtaining a domain for you if you do not already have one.

**Please note** that our web hosting provider can not provide domain hosting for any .org domains and we can not provide domain hosting for you if you use your domain for sending emails.

In cases such as this we will provide you with some changes to be made to your existing domain hosting record's DNS which will redirect the domain to the new site.

## How do I access my web template?

Firstly you need to advise us that you wish us to provide a web template associated with your Member Wizard database.

You do this by logging into your Member Wizard account, clicking the Website menu item and checking the box marked **Yes I would like to transfer our website to the Member Wizard website.**

This will send us a message and we will advise you when your template is ready.

To access your template you simply return to your Member Wizard database, click on the **Website** menu item and click the Website Template link which will have replaced the previous application form.

## How to get started designing your website

You log into the Website template using your Member Wizard login and password at the **Login** link in the top website menu. If you receive a message saying you are not authorised to edit the site it will be because your Member Wizard login has not been granted **Full Website Access** rights. In this case you need to contact your Member Wizard **Administrator** (the person who first created your Member Wizard account or whoever has **Administrator** access to your Member Wizard database).

You will notice that once you are logged in the text on the button will change from **Login** to **Settings**.

## A Brief Note about Styles in the Website Template

When applying styles such as bold, italics, font size or colour there appears to be an "order of operations" you must adhere to in order for all the styling components to show up correctly when rendered to HTML on the website. Below is the correct order:

1. Type the text first
2. Highlight the text
3. Apply the styles all in the single highlighted area at the same time in this order
  - a. Colour
  - b. Size
  - c. Bold/Italics

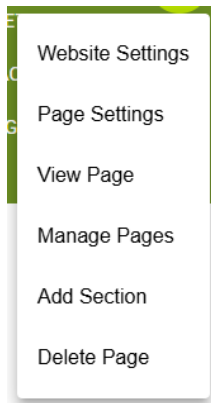
It appears that the tags which surround bold and italics text will not allow the instructions to make the text a certain size or colour to penetrate the tags once they are in place so colour and size must be applied first.

Once logged in you will see that various areas of the web page have either a green, purple or red line around them with an edit pen in the top right corner.

The outer green border defines the element the **Page**. The purple border defines a **Section**, and the red border defines a **Panel**.

The three elements are described in more detail in the following sections.

# Working with the Page menu

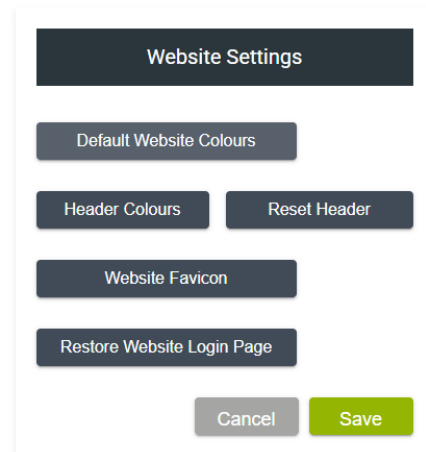


By clicking the green edit pen you will see the **Page menu** (left)

## Website settings:

From here you choose the colours both for your website as a whole and for the header and footer of the page.

The **Header colours** will define a band of colour at the top and bottom of your page into which appears your Logo and the menu. You do not need to colour this if you want to have a page with an all white background but sometimes a header can look quite effective.



You can also **Reset the Header** to its original version. If you should accidentally delete the **Website login page** then you can also restore it. Note. If the Website Login page already exists then this button option will not appear.

This page is also where you setup your **Favicon**. This is the small image which appears in the website page in your browser. Simply upload the image you wish to use or the Member Wizard logo will appear by default.

## Using Colour in your website

Colours should be used sparingly. Some colours are not friendly to those with eyesight issues. Work on the principle of defining a small colour palette which consists of a background colour (bearing in mind accessibility issues), a complementary darker shade to use as a Header colour (if desired) and a contrasting colour to be used as emphasis.

The overuse of colour is one of the key indicators that the site is not professionally managed – **Remember when it comes to colour, less is better.**

### Default Website Colours

Heading 1 Colour Black

Heading 2 Colour DimGray

Heading 3 Colour Red

Text Colour Black

Link/Menu Colour RoyalBlue

Background Colour PapayaWhip

Cancel
Save

The Link/Menu colour will set what colour your menu at the top of the page is but it will also carry through to links used within the page of your website so if you have a dark header and decide to use white for the menu links then you will need to define links used within Text boxes within the text box itself by using the Text colour icon otherwise they too will be white and unable to be seen on light coloured pages.



### Page Settings

### Page Settings

Caption  
Home

---

Route

---

Padding Top  
10px
Padding Right  
10%
Padding Bottom  
10px
Padding Left  
10%

---

Gap  
10%

---

Menu Only  
 Hidden Page  
 Protected Page  
 Custom Page Type

Duplicate Page
Delete Page

Cancel
Save

On **Page Settings** you can change the name of the page, or designate a page as a **Hidden** page or a **Menu only** page.

You can also prevent a page from being accidentally deleted, you can duplicate a page and add a **Custom page type** (see next item).

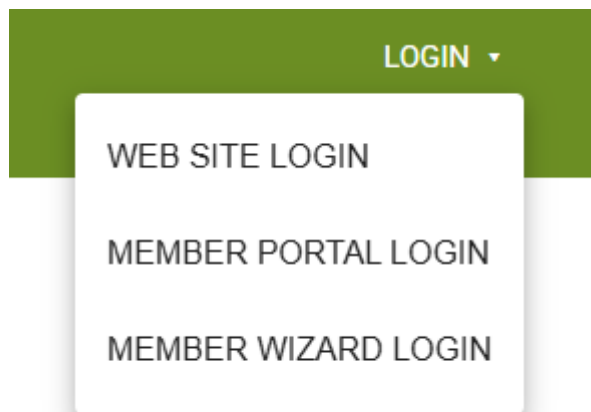
The page settings form will allow you to adjust the space surrounding the elements on your page. You should use % measurements for horizontal padding as it will allow your page to adjust easily from large screen down to phone or tablet screens.

Gaps however should be defined in pixels (PX) as these make incremental changes possible.

The Link/Menu colour will set what colour your menu at the top of the page is but it will also carry through to links used within the page of your website so if you have a dark header and decide to use white for the menu links then you will need to define links

used within Text boxes within the text box itself by using the Text colour icon otherwise they too will be white and unable to be seen on light coloured pages.

## Custom pages



There are 2 special page types you can add to your menu. To set up these special pages in Manage Pages on the Green edit pen after clicking Add Page, double click on the new page which will page called Page 1. Check the box marked Custom page type. There are 2 custom pages you can add.

1. **Menu Portal Login.** This is a page which will allow members to log into your Organisations Member Portal.
2. **Admin Portal Login.** This is a page which will allow members to login to their organisation's Member Wizard Admin Portal.
3. The **Web Site Login** page is a **protected page**. It can not be deleted. It is where you login to manage your website.

A typical use for Special Pages is to manage the Login menu item in your page header (see image above).

## View page

View Page is used to access **Hidden pages**. In the image at the bottom of the previous page you will see a tick box called **Hidden page**.

These pages are used usually to hold text which is carried over from an article or other piece of text on a previous page. It is usually accessed by the reader by clicking a link which says something such as "Read more....."

As the page does not appear in the menu the only way to access it to build and design it is via View page.

## Menu only pages

These are pages designed to act as an parent anchor for a subset of child pages such as in the example below. Here we have a Menu only page (called Menu page) with 3 child pages beneath it. There is no actual menu page. It is purely there as an anchor for the other 3 pages beneath it.

MENU PAGE ▾

MENU SUB PAGE 1

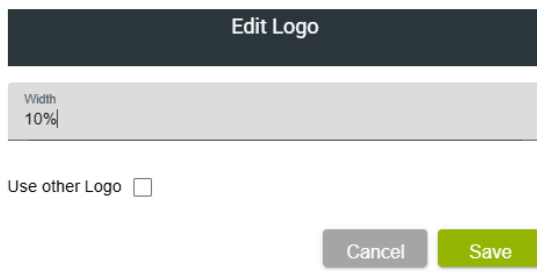
MENU SUB PAGE 2

MENU SUB PAGE 3

It is quite often used for Membership information with the first sub page being New Members, the second being Renewing Members and the third being the Member Portal. Each page can then contain both the buttons for these functions as well as information about accessing them.

## Your Logo

Your logo as it appears in your Member Wizard database will initially appear in the top left corner of your template. Quite often this appears very large because in your



Edit Logo

Width  
10%

Use other Logo

Cancel Save

database the logo image is reduced to fit into the small space allocated to it however on your website template it is unrestrained.

To reduce the size of the logo click the red edit pen in its top right corner and reduce the size as required. You can also replace the logo with another image if you prefer by

checking the Use Other Logo box and uploading your alternative logo.

## The Name of your organisation

Initially a text box containing XXXXXXXXXXXX will appear adjacent to your logo. This can be edited to your organisation's name if you desire but it can also be deleted or reduced to only a small percentage. Doing this will allow your menu to fit further along the top of the page.

## Adding a Section

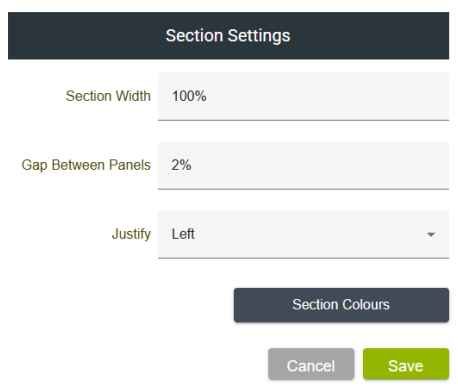
Your page needs to contain at least one section if it is not a menu only page. Sections are designed to hold panels.

Sections are covered in more detail in the next section of this document.

## Working with the Section menu

Once you've added a **Section** to your page you can click on the purple edit pen to view the Section menu.

	Section Settings
Section Settings	Here is where you set the details of the section up.
Add Section Before	Sections can run either horizontally or vertically along or down the page depending on your design requirements.
Add Section After	
Add Panel	Horizontal sections can be used to place text next to images.
Move Section Up	
Move Section Down	Vertical sections can be used to place images above text (or visa versa).
Delete Section	



The screenshot shows a 'Section Settings' dialog box. It has a dark header with the title 'Section Settings'. Below the header are three settings: 'Section Width' with a value of '100%', 'Gap Between Panels' with a value of '2%', and 'Justify' with a dropdown menu currently showing 'Left'. Below these settings is a 'Section Colours' button. At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.

The **Sections Settings** screen allows you to define if you want the panels in your section to be horizontally or vertically aligned. If you wish to align vertically designate a width of around 48% to the Section width if you want to have 2 sections side by side. The Gap between panels can also be adjusted in this menu. You can 2 or 3 sections side by side.

In a handheld device this will run one above the other.

The **Justify** field allows you to decide the alignment of picture panels inserted into the section. If you select Centre picture panels will be centred within a Section. The Justify field does not dictate the alignment of where the section sits on the page.

You can add the Section either before an existing section or after it and you can also move a section up or down from its current position on the page.

### Add Panel

Sections are designed to hold **Panels**. There are a number of different panel types and these are covered in the next section.

# Working with Panels

There are several different panel types you can work with. Most panels are width adjustable.

## Text Panels

As the name suggests these are for text on your page. If you change the % width in the Text Edit field, you can have other panels next to your text panel but remember the system does require a gap between the panels so two panels each of 50% will not fit side by side. Try making one of them 45%.

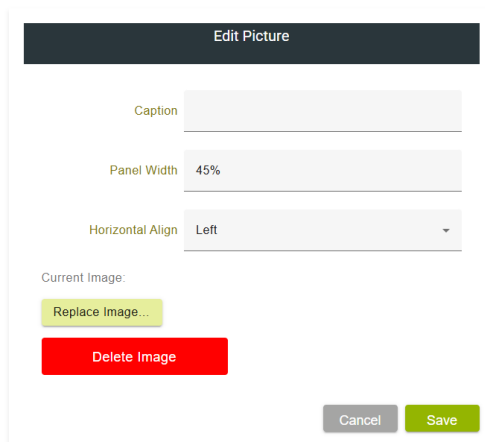
You can sit multiple panels side by side across your page provided you remember this buffer around each of them.

You enter text into the panel simply by typing it in to the area provided.

Section settings will dictate whether or not your panels contain a background or text colour.

You can place an image in your text panel and run text around it by clicking the image tool of a rectangle containing a star shape and selecting to run text either around the left or the right of the image. If you wish to include several images in a text box with text you are best off placing them in the cell of a table.

## Picture Panels



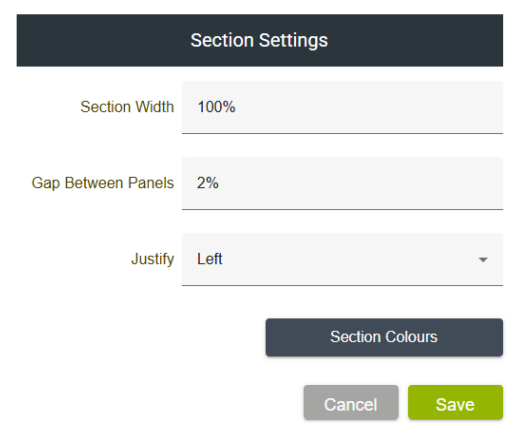
Images can be uploaded from your device into picture panels.

You can also add a **Caption** which will appear along the bottom of the image.

If at first you don't see your image once you've clicked **Save** remember that it takes time to upload to the server...be patient.

You can set the % width of your

picture panel and also the horizontal alignment of the picture within its panel. If you wish to centre an image panel (not the image but the panel which contains the image) within a Section you must do this via the Section menu by selecting Centre in the Justification field of the Section.



## Google Maps Panels

You can insert a Google map into your panel. Simply type in the address you wish the map to centre around.

You may need to be specific (street number, street, city). If you can't get your address to show on the map go to Google maps in your browser and type in the address there. You may find it is slightly different to what you are entering. Copy the address Google Maps uses and then paste that in your Google Maps panel.

## Download Panels

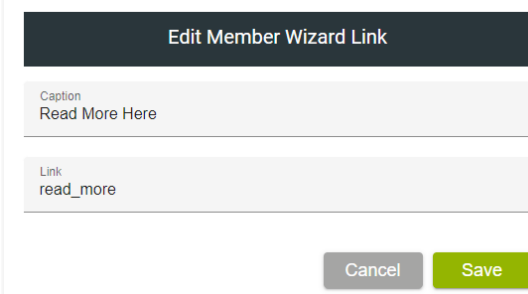
The system is designed so that any document downloads you wish to make available for download need to be stored in the **Documents** folder in your **Member Wizard** database.

When you upload the document to make it available you need to check the box marked **Public** in order to make it able to be selected for download.

Downloads will usually go into your Downloads folder on your device.

## Link Panels

These are links which allow you to link one page to another. You firstly create a **Hidden Page** and then copy the **Route** of the **Hidden Page** and use this as the link for the **Link** button. You only should put the actual page name in the **Route** eg if you have created a **Hidden Page** called **Read More** then the **Route** could be "**read\_more**". Similarly the link button link is simply **read\_more**.....not the full URL of the page.

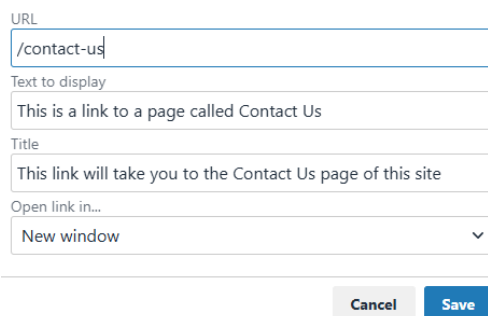


You can also insert a link to another page on your website within a text box. Simply highlight the text and click the link item (looks like a small chain) in the top menu. [This is a link to a](#)

Insert/Edit Link

×

[page called Contact Us](#)



Here is how the link is constructed. **A word of warning. This link will not work until you have copied your Edited page to Live. If you try to use it before then it will simply reload the home page and log you out.** If you check the box marked Open in a New page so that both the existing page plus the new page will be open simultaneously in separate tabs. This may or may not be

appropriate for your purpose. The title field provides an alternative to text for those who

require accessibility support. The text to display field (as the name suggest) provides the text that forms the link - its what the reader actually sees.

## Class Panels

These are only available to organisations who run classes and who have set up the classes in their Member Wizard database.

You do not need to select any file to display the **Classes** for your organisation, the system will automatically detect and load them from your database. You simply need to insert a **Class Panel** into your Section.

## Events Panels

The **Events Panel** will display any active events you have in Member Wizard much as the Class list does for Classes. The Event will disappear when the date for it has passed so you may wish to remove the panel at this time if it is the sole event. Alternatively leave the panel in situ but place a text box message on the page letting interested parties know that any events coming up will be displayed as they are opened for registration.

## New Member and Renewing Member Panels

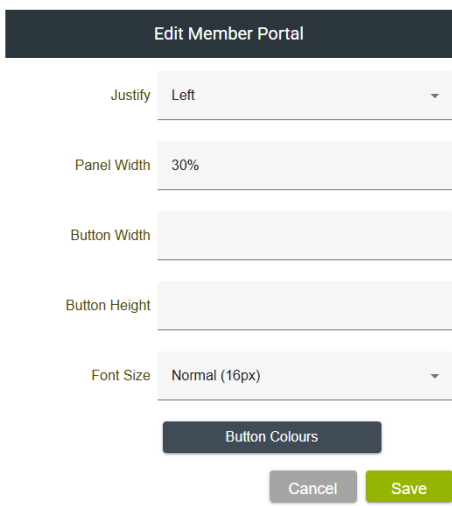
The **New Member** panel will display the **New Member Application Form** as set up in **Settings/New Member Application** in your **Member Wizard** database.

The **Renewing Member** panel will request the member's email address and if this is verified it will send the member a membership renewal invoice to their email address.

## Member Portal Panel

In order to use the Member Portal, the organisation must have set up the portal in their Member Wizard Database and the member's membership type must have been included their membership type as one of those permitted access via the Portal.

The Member Portal Panel will allow members to login to their Member Portal with either an email address or member number and a password. They will need to have registered via the website by initially providing either their email address or a member number and selecting a password or PIN.



The screenshot shows a configuration form titled "Edit Member Portal". It includes several input fields and a dropdown menu:

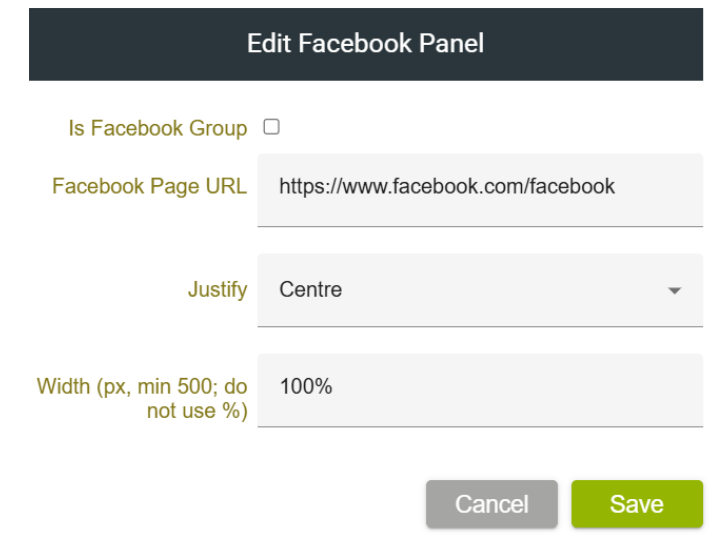
- Justify:** A dropdown menu currently set to "Left".
- Panel Width:** An input field containing "30%".
- Button Width:** An empty input field.
- Button Height:** An empty input field.
- Font Size:** A dropdown menu currently set to "Normal (16px)".

Below these fields is a "Button Colours" section with a dark grey button. At the bottom of the form are two buttons: "Cancel" (grey) and "Save" (green).

All button panels are able to be configured with size of text on the button, colour, height and width.

## Facebook Panels

If your organisation has a Facebook page you can include a link to it with a **Facebook**



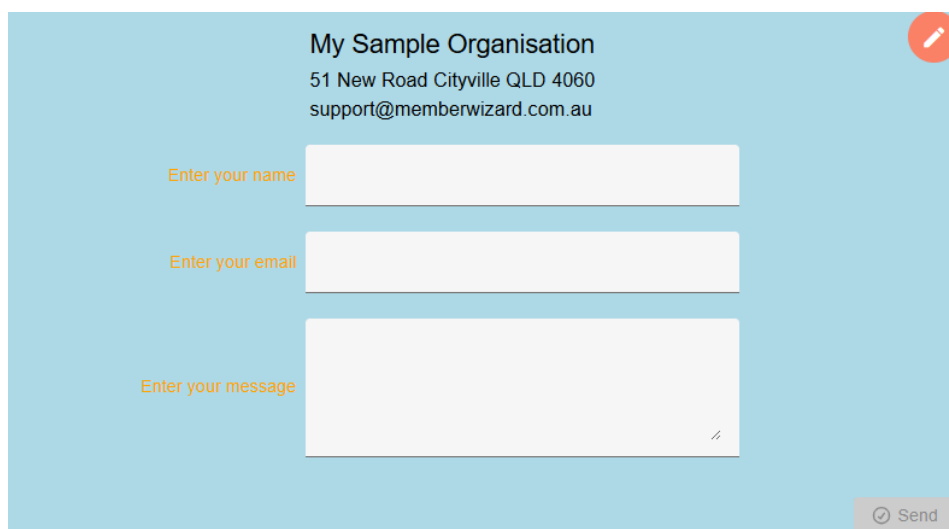
The screenshot shows a form titled "Edit Facebook Panel" with a dark header. Below the header, there are four input fields: "Is Facebook Group" with an unchecked checkbox, "Facebook Page URL" with the text "https://www.facebook.com/facebook", "Justify" with a dropdown menu set to "Centre", and "Width (px, min 500; do not use %)" with the text "100%". At the bottom of the form are two buttons: "Cancel" and "Save".

**Panel.** Simply go to your Facebook page and copy the url into the Facebook url field of the Edit Facebook Panel screen. You can obtain your Facebook URL by going to your organisation's Facebook page and copying the url link. If your organisation is registered with Facebook as a group rather than a page you will need to check the box marked **Is Facebook Group**.

## Contact Us Panel

A Contact Us panel will retrieve your organisation's address details from Settings/Organisation Details on the Contact page and place them into an emailable message box. You can hide the contact address details by checking the **Hide organisation contact details** box in the Edit screen for that panel if you wish.

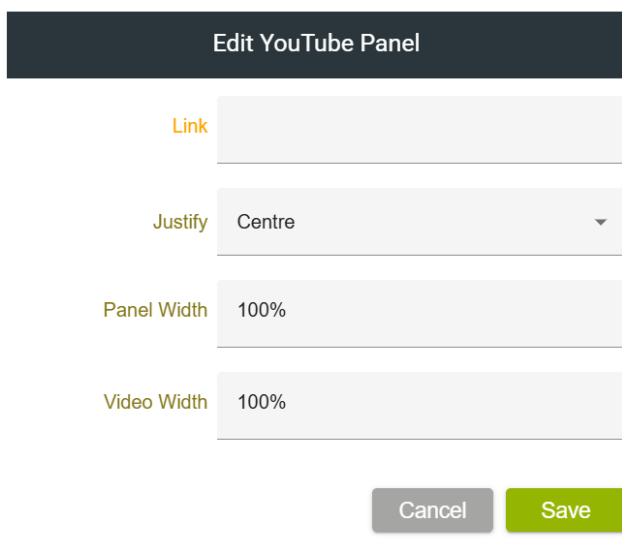
If you wish to change the email address of where the message will be sent from the main email address provided in your Member Wizard settings you can do so on the **Settings/Organisation Details/Email** tab in the **Person who receives emails inquiries from website** field.



The screenshot shows a contact form for "My Sample Organisation". The header includes the organisation name and address: "51 New Road Cityville QLD 4060" and "support@memberwizard.com.au". There is a red edit icon in the top right corner. The form has three input fields: "Enter your name", "Enter your email", and "Enter your message". A "Send" button is located at the bottom right.

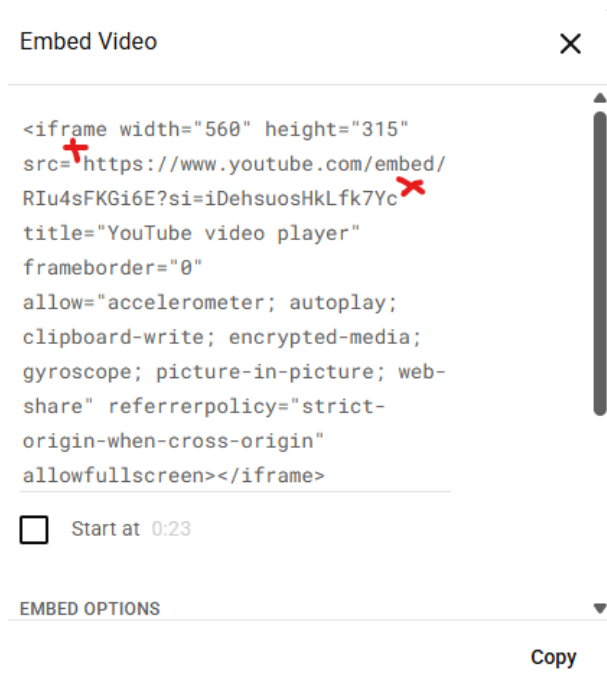
## YouTube Panel

You can place a **YouTube video** on your website with a **YouTube** panel. Place the panel in the section then click the edit pen in the corner and provide the URL of the YouTube video in the **Link** field.

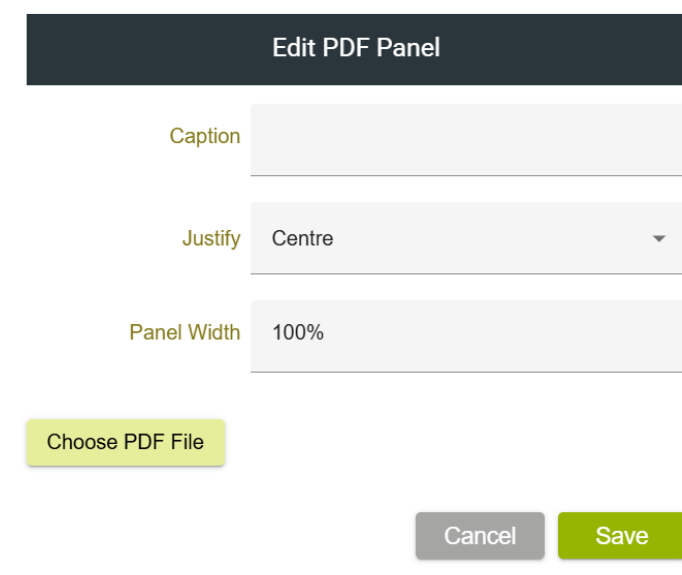


When inserting a You Tube panel click the Share button on the You Tube page. Select **Embed Video** from the You Tube share page then cut the code between the two quotation marks after the src= code as illustrated by the red crosses in the image to the right. Paste this code into the web template in the **Link** field.

section then click the edit pen in the corner and provide the URL of the YouTube video in the **Link** field.



## PDF Panel

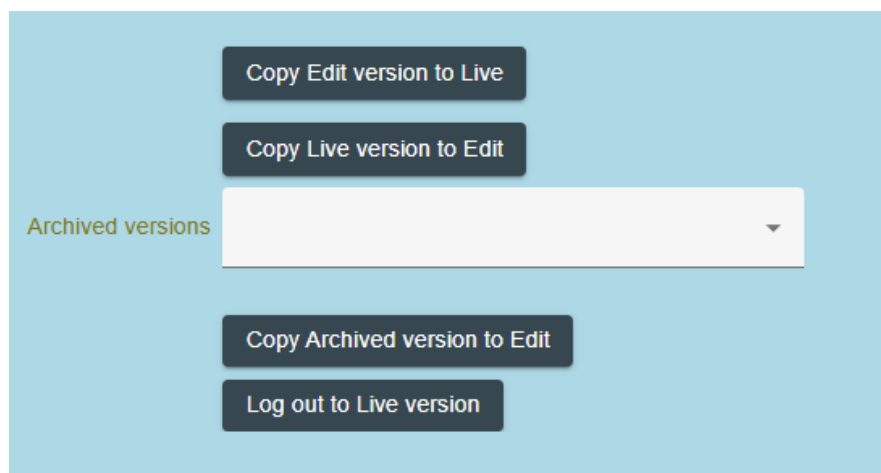


If you wish to place a PDF page on your website insert a PDF Panel then click the Choose PDF file button in the Edit PDF Panel box and upload it.

Once clicked the PDF will open in the browser window. From there it can be printed or saved.

## How do I save my edited Website Template?

Once you have your site looking how you wish you should return to the **Settings** menu and click the **Copy Edit Version to Live** button. Should you decide you prefer to restart your website you can click the **Copy Live version to Edit** button.



If you wish to return to a previous version of your website, each change is archived and can be restored by clicking the **Copy Archived Version to Edit** button and selecting the date which represents the website you wish to restore.

Once you have finished click the **Log out to Live Version**.

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