

Member Dashboard

Member Dashboard

Location

Set Up Overview

Set Up Step 1

Set Up Step 2

Member Experience

Member Dashboard

Member Dashboards organize and display content & catalogs for members. They also contain files uploaded by site administrators.

Member Dashboards organize and display content and catalogs for the member to create a personalized experience. Dashboards can also contain files uploaded by the site administrator to be accessed and downloaded.

A site can have a number of custom dashboards that are assigned to different types of members. Each dashboard can have a set of “tiles” that have custom headlines, descriptions and collections of content or posts.

When a member logs in, they can be directed right to their member dashboard as the landing page.

Topics

How do I locate this feature?

How do I set up this feature?

How do I customize a dashboard?

How do I assign a dashboard to members?

Can I have multiple member dashboard?

What does a member experience when he or she visits their dashboard?

Carolyn Bradfield
carolyn@carolynbradfield.com
Last Login: 12/06/2016 09:52 AM EST
Login Count: 78

Subscriptions	Bookmarks	Events
6	9	0

My Newsfeed	My Bookmarks	My Events	My Files
Discover new content selected for you	View bookmarks to your favorite content	See events I registered for on this site	View files added for you



QUICK TIP

Set up content and post directories first in the site pages section. Then create member dashboards, adding these directories as “tiles” inside the dashboard.

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Set Up Step 1

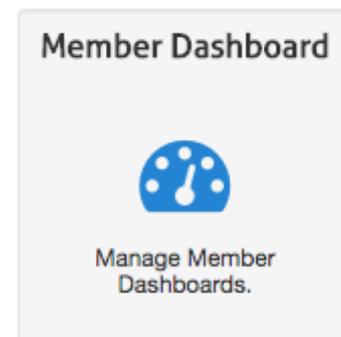
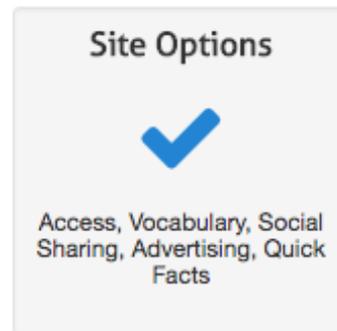
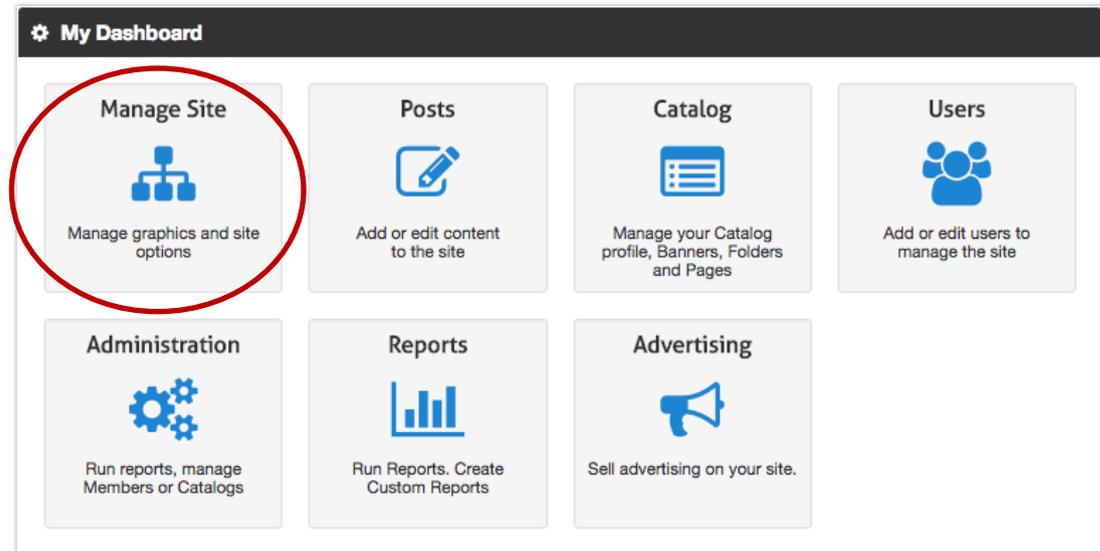
Set Up Step 2

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How do I locate this feature?

From your dashboard, select Manage Site, then select Site Options and then Member Dashboard.



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How do I set up a member dashboard?

Create a dashboard by selecting "Add New Dashboard" from the navigation or clicking the "Add New Dashboard" button.

Manage an existing dashboard by clicking the "Edit" button next to an existing dashboard. Delete a dashboard by clicking the red button next to the dashboard name.

If you have more than one dashboard and multiple member types, then you can set a dashboard priority. Use the drag button to move a dashboard up and make it a higher priority so that a member will see the highest priority dashboard on the list.

-  Add New Dashboard
-  Manage Dashboards

Manage Dashboards

Create and manage member dashboards. Click "Add New Dashboard" to add a new member dashboard. Click "Edit" to modify an existing dashboard. You can re-order them to rank each dashboard for members that have multiple member types, higher positioned dashboard will have a higher rank. If a member qualifies for multiple dashboards, they will have receive the highest ranked dashboard. If a member does not qualify for a dashboard, they will receive the Default Dashboard.

[Add New Dashboard](#)

	Dashboard Name	Manage	
	Default Dashboard		
	Sales Partners	Edit	



Remember to set up the content and post directories before you set up the dashboard. Do this in the Pages & Directories section of Manage Site

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How do I customize what appears on a dashboard?

In Step 1, give the dashboard a name and then select the default tiles that appear on the dashboard. Click the "Add Tile" button to add a new tile and select the post or catalog directory that will populate that tile. For all tiles, including default, you can pick a custom name and description.

Add New Dashboard

Step 1 Set Up (required) **Step 2** Apply to Member Types (required) **Step 3** Confirm & Save (required)

Enter a dashboard name and select the default tiles to appear on the dashboard.

Enter dashboard name:

Select	Select Type	Default Name	Custom Name	Description	
<input type="checkbox"/>	Default	My Newsfeed			
<input type="checkbox"/>	Default	My Bookmarks			
<input type="checkbox"/>	Default	My Events			
<input type="checkbox"/>	Default	My Files			

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QUICK TIP

Set up directories of posts or catalogs that are the most important items for a member to view on their dashboard. Tiles can be added or removed dynamically.

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How do I assign a dashboard to member types?

Step 2 of the set up process allows you to select member types. Pick one or more types, then click Save to finish the process or proceed to Step 3 to check your settings before saving.

Add New Dashboard

Step 1 Set Up (required) Step 2 Apply to Member Types (required) Step 3 Confirm & Save (required)

Select Membership Type

Enter Membership Type

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Show 10 records

Select	Member Type
<input type="checkbox"/>	All Members

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Cancel Back Save Next



You must set up member types in member administration so that you can complete step 2 of the set up process. Every site has an “all members” member type.

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Describe the member experience.

Members will login and can be taken immediately to their member dashboard. (Set this up in site access). When they open a tile, they will see a director of content or posts. If they are bookmarking content, they will see those bookmarks in the My Bookmarks tile. These bookmarks will create a personalized newsfeed.

If they register for events on the site, they see those events in the "My Events" tile. "My Files" contains documents that a site administrator uploads. Files are organized into folders. Members can download those files.

Members open custom tiles to see a directory of content or posts.

The screenshot shows a user interface for a "My Newsfeed". At the top, there is a blue header with the text "My Newsfeed" and a sub-header: "Your Newsfeed contains new content from company catalogs you subscribed to. Click Subscriptions button in Quick Links to add or remove company catalogs. Click 'Share' to email this post to your contacts." Below the header, there is a "Quick links" section with a search bar labeled "Search by Title", a "Name A-Z" dropdown, and a "10 per page" dropdown. To the right of the search bar is a green "Subscriptions" button. The main content area displays two newsfeed items. The first item is titled "December SPIF Flyer" and includes a thumbnail image with text like "DECEMBER SPIFS", "5X", "1X", "\$1000", "\$500", "\$250", and "4X". The second item is titled "For a limited time, performance-boosting and money-saving Unifi...". Both items have "Email" and "View" buttons. On the left side of the newsfeed, there is a "Filter By" section with two dropdown menus: "Posts Types" and "Catalogs".

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