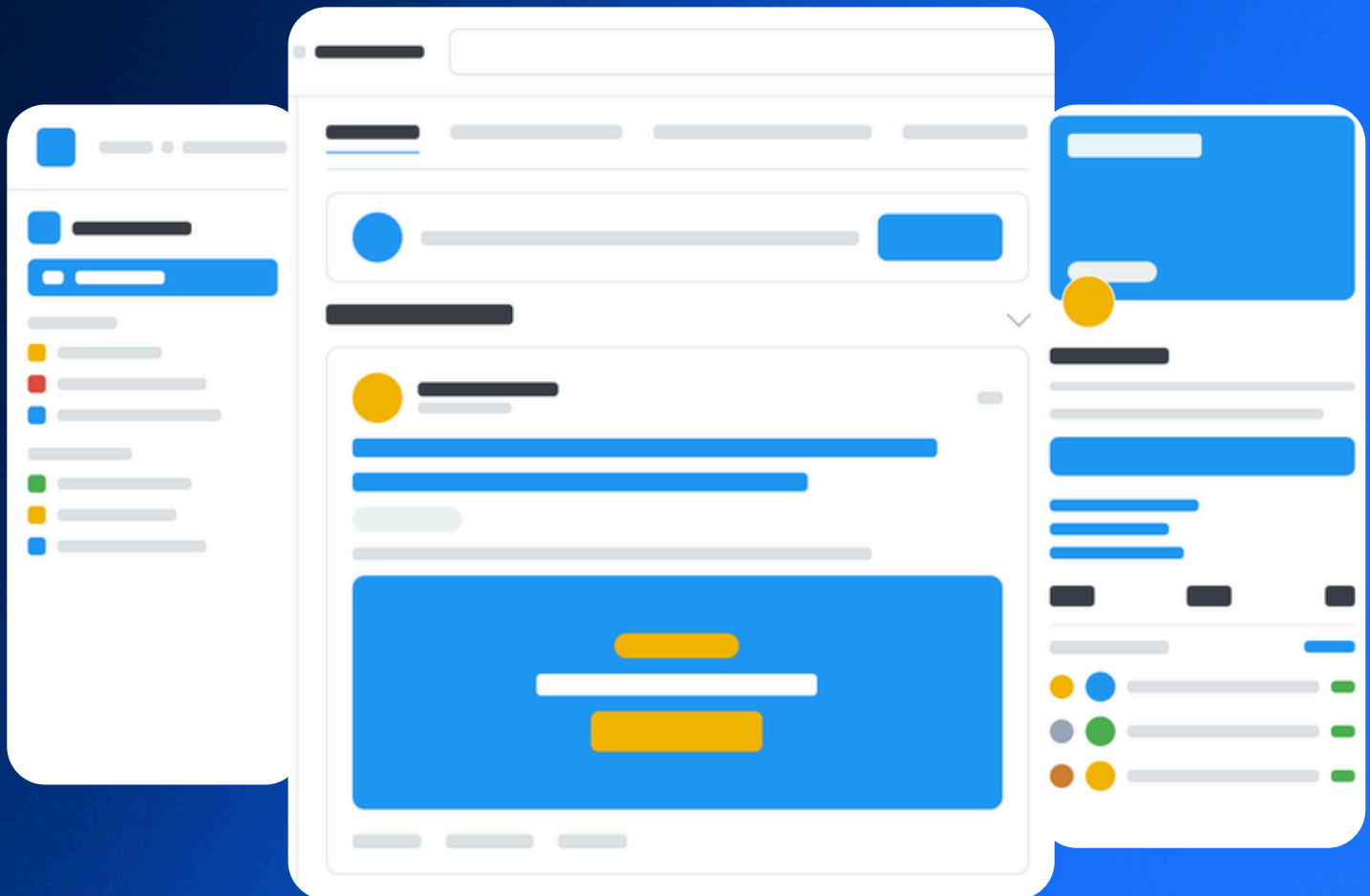


REFERENCE GUIDE

Membership Communities

Groups, Channels, People, and Rewards



Groups, Channels, Home Timeline

What It Is

A group is one community space inside your software. Channels are topic rooms in the group, and the home timeline is the main feed that gathers new posts from every channel.

How It Works For Your Business

- Search for Communities, then open Groups.
- Click Create Group on the Groups screen to start a new space. You can have more than one group.
- Open a group to land on the home timeline, where newest and pinned posts show first.
- Channels sit in the left panel, and + Add Channel makes a new one.
- Tabs across the group are Members, Learning, Events, and Settings.

Groups, Channels, Home Timeline – Tips & Guidelines

Tips

- Tour every tab once before you build anything.
- Use channels to keep topics sorted so answers are easy to find.
- Start with a few channels and add more as the group grows.
- Remember that button names can differ slightly in your account.

DO

- Learn the layout first
- Keep one topic per channel
- Use the home timeline as your overview
- Make a practice group to click freely

DON'T

- Build before you look around
- Create many empty channels
- Mix every topic in one channel
- Wait for a perfect setup

Creating and Branding a Group

What It Is

Creating a group means filling in a name, URL, and description and saving. Branding adds a favicon, cover image, and logo so the group looks like your business.

How It Works For Your Business

- Click Create Group and fill in the group name that people will see at the top.
- Add a short URL ending and a one or two sentence description.
- You may see public or private and moderator options. These can be changed later.
- Click Save, then open Settings and the Branding tab to upload your images.
- Upload a favicon, a cover image, and a logo, matching the sizes shown beside each upload.

Creating and Branding a Group – Tips & Guidelines

Tips

- Name the group so a stranger understands it in about three words.
- Keep the URL short and easy to say out loud.
- Keep the key part of the cover image in the middle for phones.
- Refresh the group after you save to check your branding.

DO

- Use a clear, simple name
- Keep the URL short
- Match the recommended image sizes
- Check the group on a phone-size screen

DON'T

- Use spaces in the URL
- Write a long description
- Upload blurry images
- Wait for perfect before saving

Posts, Reactions, and Pins

What It Is

A post is a message in a channel. Students can react or comment, and you can pin a key post to the top of its channel and the home timeline.

How It Works For Your Business

- Open a channel, start a post, add a clear title, and write your message.
- Add an image, upload an MP4, paste a share link and click Add Link, or attach files like PDFs.
- Check the channel at the bottom and click Publish Post.
- People can like, pick other reactions, and comment. Comments allow images, video, and links.
- Click the three dots on a post and choose Pin to feature it, or Unpin to release it.

Posts, Reactions, and Pins – Tips & Guidelines

Tips

- Write the title like a headline so it is the first thing people understand.
- A video share link keeps the post light and fast.
- Pin only what matters now, such as a welcome or your rules.
- Review pins monthly so old news does not sit on top.

DO

- Read the post once before publishing
- Use links for video when you can
- Pin a welcome or rules post
- Reply to comments to keep threads going

DON'T

- Publish without checking the channel
- Pin everything
- Use huge images
- Leave old pins up forever

Inviting People and Roles

What It Is

Invites bring people into a group by link or by email. Roles decide what each person can do, from full control to simple posting.

How It Works For Your Business

- Open your group, click the Members tab, then click Invite Members.
- Click Copy the Invite Link to share it anywhere, or use Email Invite with a name and email.
- Leave the Administrative Privileges toggle off for regular people, then click Send Invite.
- Roles include Owner, Admin, Channel Manager, and Contributor, as shown in your account.
- Change a role from the three-dot menu next to a person's name in the Members tab.

Inviting People and Roles – Tips & Guidelines

Tips

- Give the lowest role that gets the job done.
- Test your invite link in a private browser window first.
- Use a real name on each email invite for a clean list.
- Check the Members tab to see who joined and who is waiting.

DO

- Start people as Contributors
- Keep your invite link in a handy note
- Use Channel Manager for single-topic helpers
- Review roles from time to time

DON'T

- Turn on admin power by default
- Share the owner role lightly
- Guess what a role can do
- Skip checking the Members tab

Private Groups and Channels

What It Is

A private group controls who gets in, and approval questions help you screen requests. Private channels hide a topic room from most people, and emojis make channels easy to spot.

How It Works For Your Business

- Switch a group from public to private in its settings, then handle join requests in the Members tab.
- Look for Members Approval Questions to ask people a few questions before you approve them.
- Create a private channel with + Add Channel and look for the option that limits who sees it.
- Choose an emoji for the channel so people spot it fast.
- Choose who can see a private channel, then confirm that the right people can open it.

Private Groups and Channels – Tips & Guidelines

Tips

- Test a private group by opening the invite link in a private window.
- Keep approval questions short so people finish them.
- Use private channels for small groups like helpers or a select class.
- Check the in-app labels, since names can change.

DO

- Ask short approval questions
- Review join requests in Members
- Name private channels clearly
- Test what a new person sees

DON'T

- Write a long question list
- Leave requests waiting for days
- Hide channels without telling people
- Assume settings without testing

Learning Tab and Events

What It Is

The Learning tab holds courses inside the group so students learn without leaving. The Events tab lets you set up calls or meetups with a date, a place or meeting link, and who can see them.

How It Works For Your Business

- Open the Learning tab and click + Add Course to attach a course you already built.
- Courses inside a group can be free or paid, depending on how you set them up.
- Open the Events tab and click Create Event.
- Set the date, then a location or meeting link, and choose who can see the event.
- Visibility can follow a course, a group, or a membership level. Look in Email Settings for reminder emails.

Learning Tab and Events – Tips & Guidelines

Tips

- Build the course first, then attach it in the Learning tab.
- Add the meeting link to the event so people can join easily.
- Pick visibility before you publish an event.
- Check the reminder email settings so people get a nudge.

DO

- Attach courses you already built
- Add a clear date and link to events
- Pick who can see each event
- Check reminder emails

DON'T

- Add a course before it is ready
- Forget the meeting link
- Leave visibility on a guess
- Skip event reminders

Gamification and Leaderboard

What It Is

Gamification rewards activity with points and levels. A leaderboard shows who is most active, and offline rewards can mark big milestones.

How It Works For Your Business

- Go to the group's Settings and open the section labeled Gamification and Rewards.
- Students earn points for taking part, and points move them up through levels.
- Rename the levels so they fit your brand voice. There are nine to rename.
- Add a small number of offline rewards for students who reach certain levels.
- Turn the leaderboard on or off to show who is most active.

Gamification and Leaderboard – Tips & Guidelines

Tips

- Rename levels with words your students already use.
- Keep offline rewards realistic so you can deliver them.
- Turn the leaderboard on only if it fits your group.
- Check the in-app labels, since names can change.

DO

- Rename levels to fit your voice
- Keep rewards simple
- Decide on the leaderboard on purpose
- Review settings after changes

DON'T

- Promise rewards you cannot send
- Use confusing level names
- Ignore the leaderboard setting
- Change levels without a plan

Moderating and Reporting

What It Is

Moderation keeps a group safe and friendly. You can remove people, review reported posts, and hold posts that match keywords you choose.

How It Works For Your Business

- In the Members tab, use a person's menu to find Ban from group.
- Open Settings and look for Reported content to review flagged posts.
- Choose Keep to leave a reported post up, or Remove to take it down.
- Set moderation keywords so posts that match are held for review.
- Review held posts and decide to approve or remove each one.

Moderating and Reporting – Tips & Guidelines

Tips

- Check Reported content on a regular schedule.
- Use keywords for words you never want shown.
- Give moderator power only to people you trust.
- Write house rules and pin them so everyone knows them.

DO

- Review reports promptly
- Pin your house rules
- Keep keyword lists short
- Use Channel Managers for helpers

DON'T

- Ban someone without a clear reason
- Let reports pile up
- Add lots of random keywords
- Give admin to everyone

Workflows and Paid Groups

What It Is

Workflows can grant or revoke group access automatically, and a Paid Group puts a group behind a purchase. Together they decide who gets in and who stays in.

How It Works For Your Business

- In your workflow builder, look for actions that grant or revoke community group access.
- Pair an action with a trigger, such as someone joining a list or buying an offer.
- Use revoke actions to remove access when something changes, like a canceled plan.
- Set up a Paid Group from the group's settings, and look for the option labeled for payment.
- Test with a practice contact to confirm access is granted and removed correctly.

Workflows and Paid Groups – Tips & Guidelines

Tips

- Test every workflow with a practice contact before going live.
- Plan both the grant and the revoke path.
- Keep trigger names clear so you can find them later.
- Check the in-app help, since options may be a Labs or plan feature.

DO

- Test grant and revoke paths
- Name workflows clearly
- Use a practice contact
- Review access after changes

DON'T

- Go live without testing
- Forget to revoke access
- Build one giant workflow
- Assume it works the same everywhere

Key Terms Glossary

Community

A discussion space in your software, public or private.

Group

One community space with its own people and settings.

Channel

A topic room inside a group.

Home timeline

The main feed showing new posts from every channel.

Favicon

The tiny icon in the browser tab.

Cover image

The big banner visitors see when they land.

Reaction

A quick tap, like a heart, in place of a comment.

Pin

Keeps a post at the top of its channel and the home timeline.

Contributor

A role that can take part and post, but not moderate.

Channel Manager

A role that moderates one channel and its people.

Approval question

A question a person answers before you approve their request.

Leaderboard

A list that shows who is most active in the group.

Getting Help

Your software changes over time, so button names and menu spots may look a little different from this guide. If something does not match, open the feature's own in-app help and look for the closest option. Some options may depend on your plan.