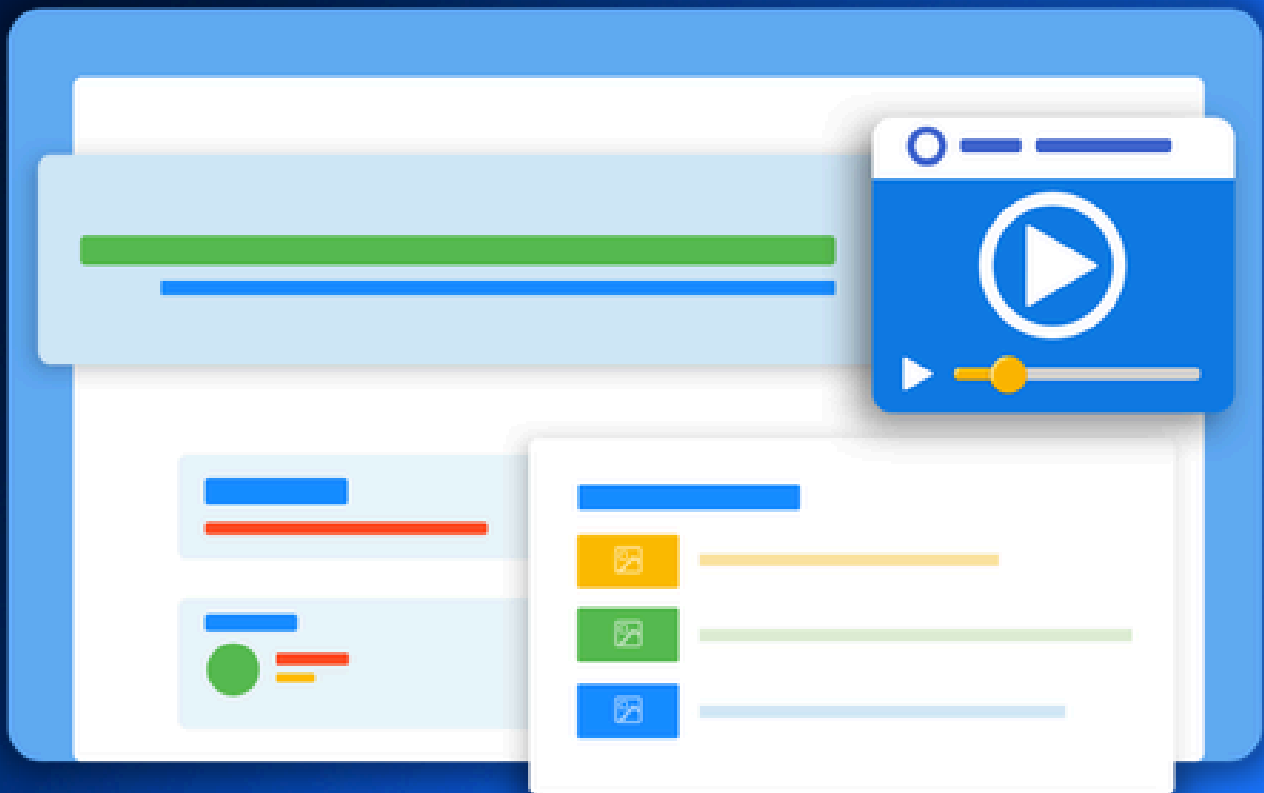


REFERENCE GUIDE

Membership Courses

Build and publish courses end to end



Menu Tour and Creating a Course

What It Is

Search for Courses to find it. Five tabs hold the course itself, how people get in, and your results. A course product is the blank container you create first.

How It Works For Your Business

- Search for Courses to reach Products, Offers, Dashboard, Analytics, and Certificates.
- Products holds the course itself. Click a product to open the editor and the Course Map.
- Click Create New, choose Start from scratch, and fill in the Course Title and Course Description.
- Upload an optional thumbnail, review the pricing and settings options, and click Create Course.
- The new course appears in the Products list, empty and ready for categories and lessons.

Menu Tour and Creating a Course – Tips & Guidelines

Tips

- Use a title your learner would type into a search bar.
- Finish this sentence for the description: after this, you will be able to ...
- Pick a thumbnail that stays readable when it is small.
- Every field can be edited after you create the course.

DO

- Start with a blank shell
- Write a plain, clear title
- Keep the description short
- Click each item once to learn it

DON'T

- Wait for the perfect plan
- Use inside jokes in the title
- Expect the product to set access
- Skip the quick tour

Categories, Sub-Categories, Lessons

What It Is

The Course Map is the outline of your course. Categories are folders like chapters, sub-categories add a second layer, and lessons hold the actual content.

How It Works For Your Business

- Open your course in the editor and find the Course Map on the left side.
- Look for the option to add a category, click it, and give it a short name like Getting Started.
- Open a category and look for the option to add a sub-category or a lesson inside it.
- Click and hold an item in the Course Map, then drag it to a new spot. Categories can be dragged too.
- Expand and collapse categories to work in one at a time, and read the status beside each item.

Categories, Sub-Categories, Lessons – Tips & Guidelines

Tips

- Keep a category to about three to seven lessons.
- Start lesson names with a verb, like Set Up or Connect.
- Give each lesson one idea. Two ideas means two lessons.
- Scan the whole map for drafts before you publish.

DO

- Name items for the learner
- Use sub-categories sparingly
- Drag to fix the order
- Check statuses before publishing

DON'T

- Build one long flat list
- Pile on layers you do not need
- Fear moving things around
- Leave a half-done lesson live

Lesson Video, Text and Files

What It Is

Each lesson can hold a video, notes, and a download. You can upload a video, embed one from another site, or reuse a file already in Media Storage.

How It Works For Your Business

- Upload: use the upload option in the lesson media area, choose a file, and let it finish before leaving the page.
- Embed: click Embed Media, paste the official embed code from your video platform, and click Embed.
- Import: click Import from Media Storage, select your file, and click Insert Media. Only audio and video work.
- Play the video, pause on a clear frame, click Use current frame as thumbnail, then click Save.
- Type notes in the lesson text area and look for the option to attach a file, such as a checklist.

Lesson Video, Text and Files – Tips & Guidelines

Tips

- Name video files so you can recognize them later.
- Embed when a video lives elsewhere. Upload to keep it all in one place.
- Check the preview to confirm the video plays.
- Upload size limits can depend on your plan, so check yours.

DO

- Keep each video on one topic
- Pick a clear thumbnail frame
- Add short notes for skimmers
- Name files plainly

DON'T

- Leave the page mid-upload
- Paste anything but the official embed code
- Pick a blurry frame
- Name files final version two

Offers and Publishing

What It Is

An offer is how a person gets into a course. It can include one or more courses and be free, one-time, or recurring. It must be Published before anyone gets in.

How It Works For Your Business

- Search for Courses, open Offers, and click + Create Offer.
- Give the offer a name your learner will recognize and fill in the details it asks for.
- Select the course or courses the offer includes. Add more than one to make a bundle.
- Choose free, one-time, or recurring pricing, then click Create or Save.
- Open the offer, change the status from Draft to Published, and click Save.

Offers and Publishing – Tips & Guidelines

Tips

- Name the offer for the learner, not for you.
- Start with a free test offer so you can walk through as a learner.
- Creating an offer is not the same as publishing it.
- You can switch an offer back to Draft to pause it.

DO

- Double-check the selected course
- Test with a free offer first
- Save after changing status
- Bundle courses when it fits

DON'T

- Forget to publish the offer
- Name it Offer Number Two
- Skip the Save click
- Think the course alone lets people in

Paid Products for Offers

What It Is

To charge for a course, you create a product (search for Products) and attach it to a published course offer. Prices can be one-time or recurring.

How It Works For Your Business

- Search for Products and click Create Product.
- Add a price and choose whether it is one-time or recurring.
- Turn on the Membership Offer toggle for the product.
- Pick the published offer you want this product to unlock, then click Save.
- Test the checkout path so you know the right course opens after payment.

Paid Products for Offers – Tips & Guidelines

Tips

- Publish the course offer first so it shows in the list.
- Choose recurring only if you want ongoing access.
- Test with your own contact before you share a link.
- Payment setup may need extra steps, so read what your account shows.

DO

- Publish the offer first
- Match the price type to access
- Test the whole path
- Save after attaching

DON'T

- Attach a draft offer
- Pick recurring by accident
- Skip a test run
- Forget to click Save

Drip Release and Preview

What It Is

Drip release unlocks lessons or categories over time instead of all at once. A preview toggle lets you see the locked and unlocked views as a student would.

How It Works For Your Business

- Open a lesson or category and look for its drip settings.
- Read the allowed values on your screen and choose when that item unlocks.
- Apply drip to a whole category to release a group of lessons together.
- Use the admin preview toggle to switch between a locked view and an unlocked view.
- Check the preview after each change to confirm the order feels right.

Drip Release and Preview – Tips & Guidelines

Tips

- Drip a whole category when lessons belong together.
- Preview locked and unlocked views before you publish.
- Release timing should match how fast people can do the work.
- Leave the first lesson open so students can start right away.

DO

- Preview both views
- Drip by category when it fits
- Keep the first lesson open
- Re-check after edits

DON'T

- Lock the very first lesson
- Guess how it looks
- Set odd timing without testing
- Forget students see the locks

Quizzes and Certificates

What It Is

Quizzes check what students learned and can set a passing grade. Certificates are completion awards you attach to a course from its Certificates tab.

How It Works For Your Business

- In a lesson, click + Add Content to insert a quiz.
- Add single choice and multiple choice questions.
- Set a passing grade and write the pass and fail messages students will see.
- Open the course's Certificates tab, attach a template, choose the Course Completion category, and click Save.
- To revoke one, search for Courses, then open Certificates, then Issued Certificates.

Quizzes and Certificates – Tips & Guidelines

Tips

- Write pass and fail messages that tell students what to do next.
- Keep questions tied to one lesson's content.
- Preview a certificate before you attach it.
- Test the quiz yourself to see how it grades.

DO

- Mix single and multiple choice
- Set a clear passing grade
- Choose the right category
- Test the quiz yourself

DON'T

- Write trick questions
- Leave messages blank
- Skip Save on the certificate
- Attach the wrong template

Dashboard and Member Analytics

What It Is

The Dashboard shows how your courses perform at a glance. Analytics goes deeper into each student's progress and into assessment results.

How It Works For Your Business

- Open Courses, then Dashboard to see top and least performing courses, 30-day revenue, AOV, and a progress funnel.
- Use the CSV export to take the numbers into a spreadsheet.
- Open Analytics, then Member Analytics for a list of students with filters.
- Click the eye icon on a row for details, and mark lessons complete when needed.
- Open Analytics, then Assessments, filter by Passed or Failed, and export the results.

Dashboard and Member Analytics – Tips & Guidelines

Tips

- Check the Dashboard first, then dig into Analytics for who is stuck.
- Use the progress funnel to see where learners drop off.
- Filter assessments by Failed to find who needs help.
- Export a CSV before you change anything big.

DO

- Start at the Dashboard
- Use filters to narrow the list
- Export when you need records
- Mark completion only when true

DON'T

- Ignore the progress funnel
- Scroll when you can filter
- Mark lessons complete by habit
- Skip the assessment results

Granting Access With Workflows

What It Is

A workflow can give a contact access to a course offer automatically, so you do not add people by hand. Test it on a contact before using it for real.

How It Works For Your Business

- Search for Workflows and build or edit a workflow with the trigger you want, such as a tag or form.
- Add the action that grants a course offer and pick the offer from the list.
- Save and publish the workflow so it runs.
- Test with a contact you control and watch for the enrollment.
- Open the course as that contact would to confirm the right lessons show.

Granting Access With Workflows – Tips & Guidelines

Tips

- The offer must be Published to be granted.
- Use a test contact so you never guess if it worked.
- Name the workflow after what it grants.
- Read what the action asks for, as labels can change.

DO

- Grant a published offer
- Test on a contact first
- Name workflows clearly
- Check the learner's view

DON'T

- Grant a draft offer
- Launch without a test
- Name it Workflow Copy
- Forget to publish the workflow

Key Terms Glossary

Product

The course container that holds your lessons.

Offer

How a person gets access to a course.

Course Map

The outline of categories and lessons in the editor.

Category

A folder that groups lessons, like a chapter.

Sub-category

A smaller folder inside a category.

Thumbnail

The picture shown on a tile or before a video plays.

Embed Media

Plays a video from another site inside your lesson.

Media Storage

Where uploaded video and audio files are kept.

Draft

Saved but not live yet.

Drip release

Unlocks lessons over time instead of all at once.

Passing grade

The score a student needs to pass a quiz.

Workflow

An automation that can grant a course offer.

Getting Help

Your software changes over time, so a button, tab, or label may look a little different from what you see here. If something does not match, check the in-app help for Courses or look for the option with the closest name.