Initial Account Set-Up

I. Get to License Holder Dashboard
    A. Login
    B. Hover over "My Sites" (houses icon on top right).
    C. Hover over "License Holder Registration" site title.
    D. Click on "Dashboard" (under "License Holder Registration" site)

II. Check Application Status
    A. Hover over "Formidable"
    B. Click on "Entries"
    C. Make sure there are 3 entries from the new License Holder (LH)
        1. License Holder Account Creation
        2. LH Agreement
        3. LH Site Specifications
    D. Hover over "Woocommerce"
    E. Click "Orders"
    F. Make sure there is a "Completed" payment from the new LH for their registration

III. Check Site Account Creation
    A. Click "Users"
    B. Make sure the new LH's account was created by the system.
    C. Write down the email used by the LH for their account.
    D. If the account was not created automatically, please notify your PM Lead. Then follow instructions for "Manually Creating User Account" found in the PM Portal.

Personalized Website Set-Up

I. Get Site Specifications
    A. Hover over "Formidable"
    B. Click on "Entries"
    C. Click on "View" under entry for the new LH's "LH Site Specifications" form
    D. Right click on the logo the LH uploaded (if they added one) and select "Save image to Downloads" or other prompt that allows you to save the image to your computer's download file.
    E. Right click on the profile image the LH uploaded (if they added one) and select "Save image to Downloads" or other prompt that allows you to save the image to your computer's download file.
    F. Write down the following information:
        1. Entry next to "Personalized Site Name"
        2. Entry next to "Which identifier do you use for your business?"

II. Prep Personalized Website (PW)
    A. Hover over "My Sites"
    B. Hover over "Network Admin"
    C. If "NS Cloner" is visible in the list, click it. If it is not visible, click "Plugins," then click "Network Activate" under NS Cloner before going onto next step.
    D. Once in NS Cloner area:
        1. Leave all setting as they are in the first section.

2. In second section, click on the box under the words "Select a site to clone." Scroll down the list until you see "Cloning Site- www.drsanswerlite.com/cloneme - ID:19"
3. Click the "Cloning Site" so it the one selected for cloning.
4. Scroll down to section three. Enter the personalized site name you wrote down from the LH's "LH Site Specification" entry in the box under "Give the target site a title," and again in box under "Give the target site a URL" (see Personalized Site Set-Up Section I. F. above). There should be no spaces in the URL box.
5. Leave all other sections untouched and scroll down to the bottom of the screen and click the "Clone" button on the bottom right corner.
6. Wait for confirmation message to appear stating the site was cloned successfully.

IV. Activate Account in PW
   A. Hover over "My Sites"
   B. Hover over the newly created site (will be the last one in the list)
   C. Click "Dashboard"
   D. Scroll down to "Users" then click on "Users"
   E. Click "Add New" button on top of Users Page
   F. Start typing in the email the LH used for creating their account (see Initial Account Set-Up Section III. C.) in the Email Box. Their name will likely pop-up as you type, select their user information when it appears.
   G. Select "License Holder" from the "Role" drop down menu.
   H. Click the box next to "Skip Confirmation Email"
   I. Select "License Holder Access" from the "Other Role" drop down menu.
   J. Click "Add Existing User" button
   K. You will know the process was successful when there is a small message above "Add Existing User" that says "User has been added to your site."

V. Personalize the PW Images
   A. Click on site name in the top black admin bar (next to "My Sites"). This will take you to the site's home page.
   B. Click "Edit Page" from the top admin black bar
   C. Hover over the box titled "Single Image" in the second section down. Options with icons will appear, click the "pencil" icon (to edit the box).
   D. Click the green "+" next to the existing image displayed.
   E. Click the first tab on the top of the screen titled "Upload files"
   F. Select the downloaded image you saved from the uploaded logo file.
   G. Once it is uploaded, make sure it is selected and then click "Set Image" button on bottom right of screen.
   H. Click "Save Changes" button.
   I. Click "Update" button on right side of screen
   J. Scroll down the edit page to the bottom. There is a box titled "Fancy Media." Hover over it until you see the pencil icon, then click on pencil.
   K. Use the same steps (upload file tab) to upload the Profile picture the LH provided (if they offered one). If they did not, offer one, use the same logo pic from the top area.
   L. Make sure to click "Set Image" button before leaving the upload/image selection screen.
   M. Scroll up the page and click "Update" button.

VI. Personalize the PW Words
   A. Stay on the new site's "home" editing page

B. At the top next to the Single Image you already replaced with the logo is a box titled "Headings" and inside the box are the words "I am excited to offer…" Hover over this box and then click the pencil icon.
C. Here are the words for different types of companies:
   1. Title Box (You may have to scroll up the screen to see the Title box):
      a. If the company has more than one person, leave this box the same.
      b. If there only one doctor/practitioner, replace the words in the Title box to "I am excited to offer you a reliable way to lose weight with my new online Doctors Answer® Lite program."
   2. Scroll down to the "Sub Heading (Optional)" box:
      a. If it is a multi-person company, replace the words "COMPANY NAME" with the company's preferred name (stated in their LH Site Specification entry). Leave the rest the same.
      b. If it is a single person entity, replace the words "…COMPANY NAME is encouraging you to participate in our Doctors Answer® Lite Program…" with these words, "I am encouraging you to participate in my Doctors Answer® Lite Program"
D. Click "Save Changes" box
E. If the company is a multi-person company, leave the rest of the site the same. **END HERE Scroll up and Click "Update"**

Single person company instructions:
F. If it is a single person company, scroll down past the first group of "Info Box" items until you see the section with a box titled "Headings" containing the words "Why this Program?"
G. Hover over the box, then click the pencil icon.
H. Change the second sentence in the Sub Heading box to "I like this program…" Keep the rest of the sentence the same. Click "Save Changes" button.
I. Next, scroll one row down where the box is titled "Headings" and it says "You are invited to learn more"
J. Hover over the Headings box and click the pencil icon.
K. Change the words in the Sub Heading box. Second sentence should read, "Come to a virtual informational meeting to learn how I am helping people just like you to lower their BMI and increase their overall health." Click "Save Changes" button.
L. Lastly, scroll down until you get to the second logo area (titled "Fancy Media")
M. Hover over the words under the logo box that start with the words "We are glad you have taken the time…"
N. Click the pencil icon.
O. Change the first sentence to read, "I am glad you have taken the time to review my new program." Click "Save Changes" button.
P. Scroll up the page and click "Update"

VII. Edit "Save a Seat" Links
   A. Stay on the new site's "home" editing page
   B. Scroll down 5 rows until you see the "Advanced Button" box (it is under the "You are invited to learn more" Headings box.
   C. Hover over the button box and click the pencil icon.
   D. Click the button titled "Select URL"
   E. In the box next to "Search" type in "Save," wait for the options below to change. Select the option that says "Save a Seat" (usually the second option down). It will be highlighted in grey once selected. Click "Set Link" button.
   F. Click "Save Changes"

G. Scroll down until you see the second logo section. At the bottom of that section there is another "Advanced Button." Hover over the Advanced Button box, then click the pencil. And repeat the edits…
H. Type "Save" into the search box, select the "Save a Seat" option, and click "Set Link."
I. Click "Save Changes"
J. Scroll up to the top of the page and click "Update" button.