

Portal Setup Guide



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Overview

BenefitHub has several self-service features that allow you, the site administrator, to customize the site. As a site administrator of your BenefitHub, you will be able to do the following:

- **Customize Your Site**
 - Changing Your Site's Logo
 - Updating Site Theming
 - Vendor Blocking – instant access to block or unblock any vendor
 - Adding a Custom Category – highlight your company's exclusive offers
 - Access to the BenefitHub App Store
 - User and Administrator Access
- **Communication to Your Users**
 - Launch Flyer
 - Announcement
 - Notifications
- **Reporting on utilization of the site including participation rate, total and unique site visits etc.**

If you create the site yourself, you are automatically the site administrator.

If you are the site admin, you will see the settings gear in the upper right corner of the page.

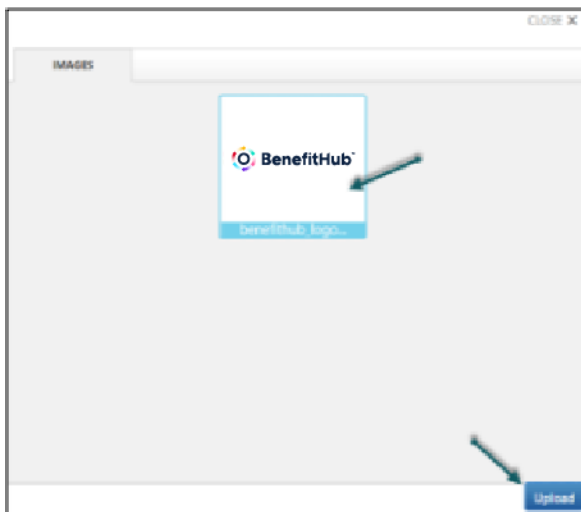


Customizing Your Site

Changing Your Site's Logo

You can change the logo that displays at the top of the page. Logos must be in png, jpg or gif format. The recommended size is 380px X 130px.

1. Click on the pencil icon (✎) next to the current logo.
2. Select **Upload** and browse to the logo image on your computer.
3. Select the image and click **Open**. The image displays.



4. Select the image and click **Upload**. The new logo displays.

Updating Site Theming

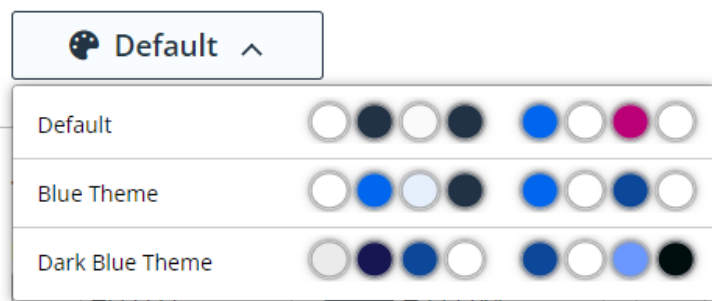
In this section, you will have the ability to customize the colors of the home page navigation bars, links and buttons throughout the site.

1. From the Home page, Click on **Admin Wheel Cog** and then **Settings**.
2. Click **Manage Theme**.

You can either select from three preset themes where the colors are selected for you or you can choose the colors you would like for each applicable area.

3. At the top of the page under **Select a Preset Theme** click on the box labeled **Default**. Three preset themes will be shown: Default, Blue, Dark Blue Theme.

Select a Preset Theme



4. When clicking on any one of these items, you will immediately see the change in your top navigation bar. Select one of the themes.
5. Scroll down the page and click **Save Theme**.

6. Pop up box asks, “The changes will be applied for all users. Are you sure to save? Yes or Cancel.” Click **Yes** to save or **Cancel** and you will be brought back to the Theming page.

If you would like to customize the colors on the site move to the next section below.

Top Navigation Styles		Sub-navigation Styles	
Background Color *	Link Color *	Background Color *	Link Color *
<div>#EBEBEB</div>	<div>#171753</div>	<div>#09479A</div>	<div>#FFFFFF</div>

For each item, you have the option to enter the Hex#, RGB or select a color from the box. If the colors you select are not compliant with the Americans with Disabilities Act WCAG 2.0 AA guidelines, you will see a warning message. However, if you choose not to follow these guidelines, you will be able to save the colors you’ve selected.

Note on Accessibility: We strongly encourage WCAG 2.0 level AA for contrast with text. [Learn more](#)

Top Navigation Styles

Background Color * Link Color *

#f8e71c #171753

Sub-navigation Styles

Background Color * Link Color *

#09479A #FFFFFF

Color picker interface showing a color selection tool with a color bar and a color box. The color box is yellow. The color bar has a gradient from red to purple. The color box is labeled 'New Basic Link' and 'Basic Link'.

7. Under Top Navigation Styles, you can change the Background Color and Link Color of the Top Navigation bar. (Here you can see Yellow and Dark Blue.)

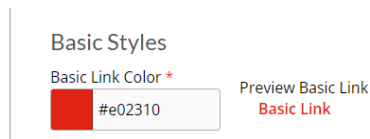
Search all Savings...

\$0.00

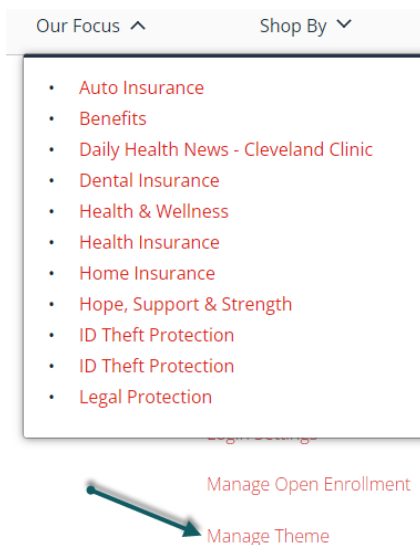
8. Under Sub-Navigation Styles you can change the Background Color and Link Color of the Sub-Navigation bar. (Here you can see Blue and White.)

Discounts Local Deals

9. Basic Styles Section



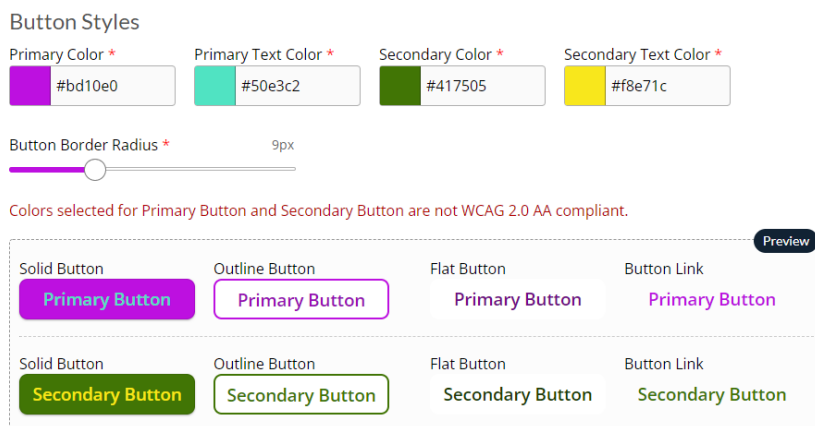
The Basic Link Color appears anywhere there is a drop down with links. For example: The Left Navigation menu, Our Focus and Shop By sections.



10. Button Styles – The buttons appear throughout the site inside the offer tiles and on the category pages.

The Preview section will show you how the button and text will appear on the site as you make the change.

Button Border Radius – As you slide the button left to right, it will change the shape of the button and will be shown in the preview section.



11. To save your changes, click **Save Theme**.

12. Then click **Okay**.

13. If the colors you selected are not ADA compliant, a warning will appear after you click **Save Theme**. To save select, “I understand, Save Anyway.” To go back and make more changes select **Make Changes**. This will bring you back to the theme page.

Your Theme is Not Compliant

Your current settings are not compliant with WCAG 2.0 AA contrast requirements. We recommend you change your selections to assist your users. **If you continue, your site will be less accessible for your users.**

I understand, Save Anyway

Make Changes

Note: If you'd like to go back to the original theme colors, simply select a Preset Theme and Save theme.

Vendor Blocking

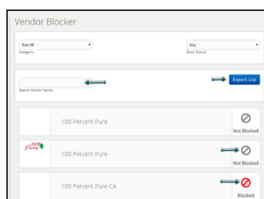
In this section, you can block any vendor you do not want users to see on your site. You can also export a list to Excel to periodically review all vendors.

Blocking a Vendor

1. From the Home page click on **Wheel Cog** then select **Settings**.
2. Click **Vendor Blocker**.



The Vendor Blocker screen displays.



3. Locate the vendor you want to block. You can sort the vendor list by Category or by Block Status. You can also use the **Search Vendor Name** option to narrow the list of vendors.
4. Click **Not Blocked** to toggle the vendor to **Blocked**.

Note: To unblock a vendor, click **Blocked** to toggle back to **Not Blocked**. Once you complete blocking vendors, return to Home.

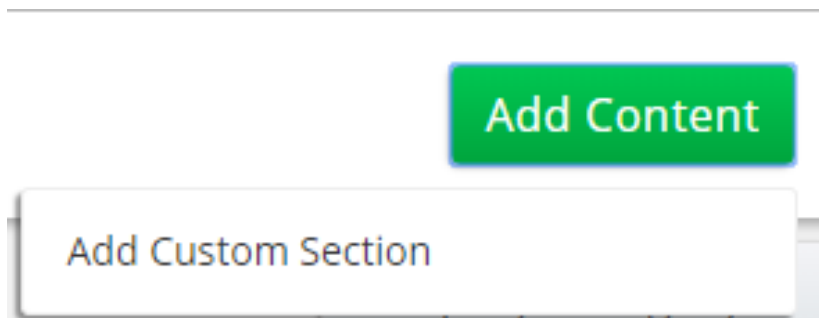
Exporting the Vendor List

You can export the list of vendors to Excel by clicking **Export List**.

This exported list shows the vendor's name, category and blocked status. This list can be reviewed periodically to identify any new vendors that may need to be blocked.

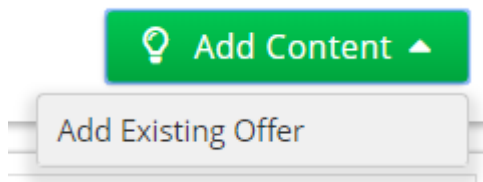
Adding a Custom Category

1. At the top of the page click **Edit**.
2. Click **Add Content**.
3. Click **Add Custom Section**. The custom category is created on the Home page and displays in the left navigation and under Our Focus.

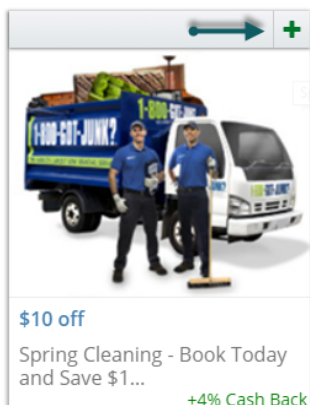


Adding an Offer to the Custom Category


1. You can pin an offer to display in the custom section. There are two different ways.
2. From the Home Page, click on the **Custom Section** and the page will open.
3. From the Custom Section page, Click on **Edit** at the top of the page.
4. Select **Add Content**, then **Add Existing Offer**.

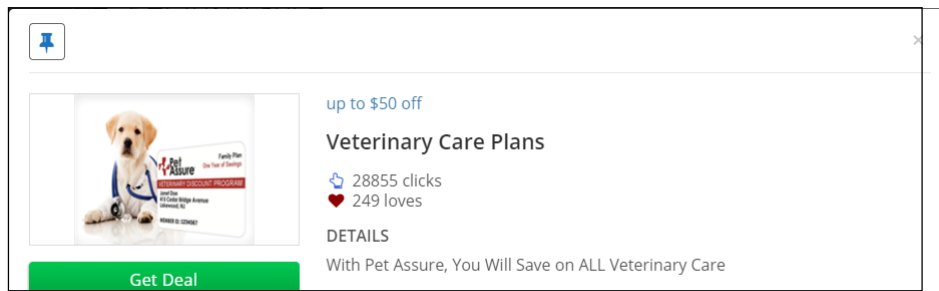


5. Under Select a Program, click on the drop down arrow and scroll to the vendor you would like to add. Then click on it.
6. The available offer tiles will appear. Click on the (+) sign to add the offer.

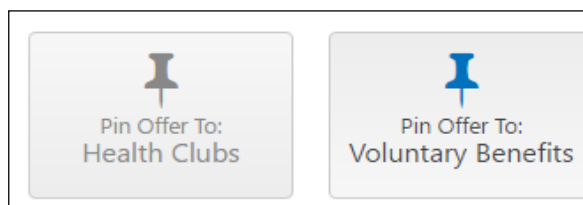


The second way to add an offer:

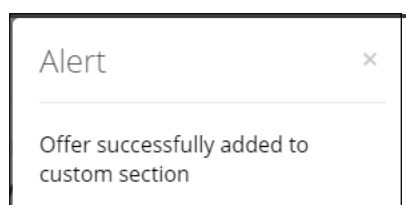
1. Navigate to a category and the offer you want to pin.
2. Click on the offer.
3. Click the  icon located in the upper left. A list of available custom sections displays.



4. Select the custom section where you want to pin the offer. This copies the offer so it displays in the custom section.

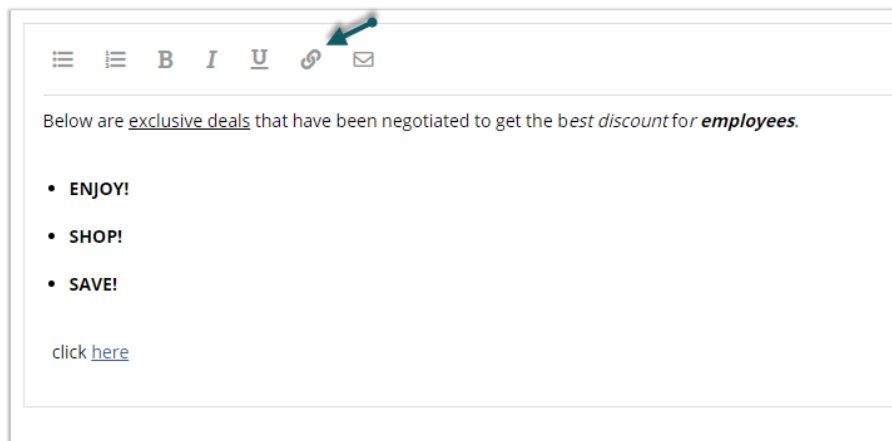


A message indicates the offer is pinned.



Adding a Message to the Custom Category

1. From the Home Page, click on the **Custom Section** and the page will open.
2. From the Custom Section page, Click on **Edit** at the top of the page.
3. A section will open for you to type the message.



4. Use any of the styling options shown (Bullet Point, Bold, Italic, Underline, Link Out, Link to Email). To link out to a website, highlight the word you want to hyperlink, then select the **Chain Link** icon. Type in the web address including https://
5. When done, click **Save** at the top of the page.

Accessing the BenefitHub App Store

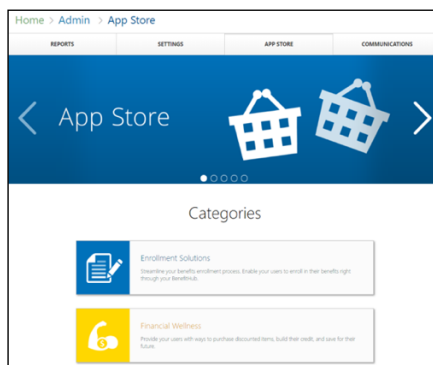
The App Store has information on various products and services that BenefitHub offers. Some are free and can be turned on instantly.

Any questions, contact BenefitHub Client Services team at

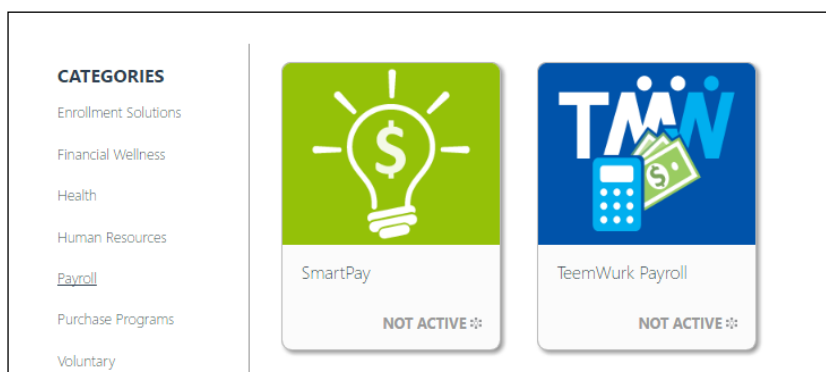
wtw@benefithub.com or +1 (866) 222 8789.

View Available Apps


1. Click the **Wheel Cog**
2. Select Apps
3. Click on a Category



Select an app of interest to read more information about the app.



For example, if you click on **SmartPay**, the following screen displays:



SmartPay
NOT ACTIVE ❌

[Overview](#) | [Screenshots](#) | [Cost](#) | [Setup](#)

■ What Is It?

A payroll deduction management solution, providing employers with a single interface to industry-leading voluntary benefit providers. SmartPay automatically and electronically manages all eligibility, premium deductions, reconciliation, and vendor payments for an unlimited number of voluntary benefits.


■ Who's it For?

- Full-Time Employees
- Part-Time Employees
- Retired Employees

■ Details

A payroll deduction platform that provides a single interface to industry-leading voluntary benefit providers. It automatically manages all eligibility, premium deductions, reconciliation, and provider payments for an unlimited number of voluntary benefits.

■ Useful Links

 **WEBSITE**

Need assistance? Call 844-44-BENEFIT (844-442-3633) or email us at appstore@benefithub.com

User and Administrator Access

In this section, you can:

- Search for any user account
- Export a list of all users to Excel
- Delete or Deactivate a user account
- Update user access to Admin or User

To get started:

1. From the Home Page click on **Wheel Cog** then select **Settings**.
2. Select **Manage Users**.



The Edit Users screen displays.

The screenshot shows the 'Edit Users' interface. At the top, there is a search bar labeled 'Search For Employee:' with a text input field and a 'By:' dropdown menu set to 'Any'. Below this is a 'Filter By Role:' dropdown menu set to 'See All', and two buttons: 'Add User' and 'Export Users'. A section titled 'Current User:' displays a table with columns 'User Role', 'Name', and 'Username', showing 'Admin', 'Melanie Lopez', and 'Melanie@benefithub.com'. Below this is a 'User List:' section with a table of users. Each row in the 'User List' has a 'User Role' dropdown, 'Name', 'Username', 'Deactivate' button, and 'Delete User' button. Annotations with arrows point to the search input, the 'Export Users' button, the 'Deactivate' button for Anthony Santana, the 'Delete User' button for Bobby Shapiro, and the 'User Role' dropdown for Brenda Hall.

User Role	Name	Username	Deactivate	Delete User
Admin	Anthony Santana	Anthony.santana@motivano.com	Deactivate	Delete User
Admin	Bobby Shapiro	bobby.shapiro@motivano.com	Deactivate	Delete User
Admin	Brenda Hall	Brenda.hall@motivano.com	Deactivate	Delete User
Admin	Brenda Hall	Brenda.hall@benefithub.com	Deactivate	Delete User

From this screen you can:

Search for Employee – Enter any part of the name and choose to search by any name, user name, first name or last name.

- **Filter By Role** – Filter the user list by role; choose from Super Admin, Admin, and User.
- **Export Users** – Click this button to export a list of all user accounts. The Excel file includes the user name, email, zip code, registration date and last login date.
- **Delete or Deactivate** – Click on the **Deactivate** or **Delete User** button to deactivate (meaning the user is still in the system but unable to access) or delete a user (removes the user).
- **User Role** – You can change the user's access rights to be either Admin or User. Click on the **User Role** drop-down arrow next to the user and select the role you want to assign the user. You are prompted to confirm the role. Click **Confirm**. Log out and back in with your password to see the admin functionality. If you don't, then changing the user role does nothing.

Once you have finished editing users, return to Home.

Communication to Your Users


We are happy to provide you with communication material to help **promote your Discount Marketplace**, successfully.

These include:

- (a) Launch Flyer
- (b) Launch Announcement
- (c) User Guide

Launch Flyer

Create a buzz around your platform with the help of customizable Launch Flyer. You can add your company logo and modify the content based on your company's requirements. The flyer also has a QR code to facilitate an easy signup process, which dynamically changes based on the portal URL that you have entered.






A World of Discounts is Waiting...

Save Big. Every Day.

Welcome to your new [discount marketplace name]!

Enjoy discounts, rewards, and perks on 1,000s of brands you love in a variety of categories:

- Travel
- Auto
- Electronics
- Apparel
- Local Deals
- Education
- Entertainment
- Restaurants
- Health & Wellness
- Beauty & Spa
- Tickets
- Auto & Home Insurance





It's easy to access and start saving!

1. Go to: <https://abc.benefithub.com/welcome/signup>
2. Enter your name and official email address
3. Start saving today!



Or scan here now!



Questions? Call +1 (866) 222 8789 or email wtw@benefithub.com

Launch Announcement

Ensure that each employee is aware of your exciting new Discount Marketplace with our Launch Announcement template. Simply copy and paste the subject line and body copy into your email and send it out to all your employees. You can attach the Launch Flyer provided as a PDF after customizing it.

 BenefitHub™ | 

Launch Announcement

Subject Line:

New Benefit Announcement for [Insert Your Company Name] Employees!

Body Copy:

We are so excited to announce the launch of [Your Discount Marketplace Name]! This benefit — which is exclusive for you — allows you to access thousands of amazing discounts that you cannot find anywhere else.

You will find deals on travel, restaurants, shopping, family care, car rentals, your favorite local establishments and much more! All through an easy-to-use online marketplace.

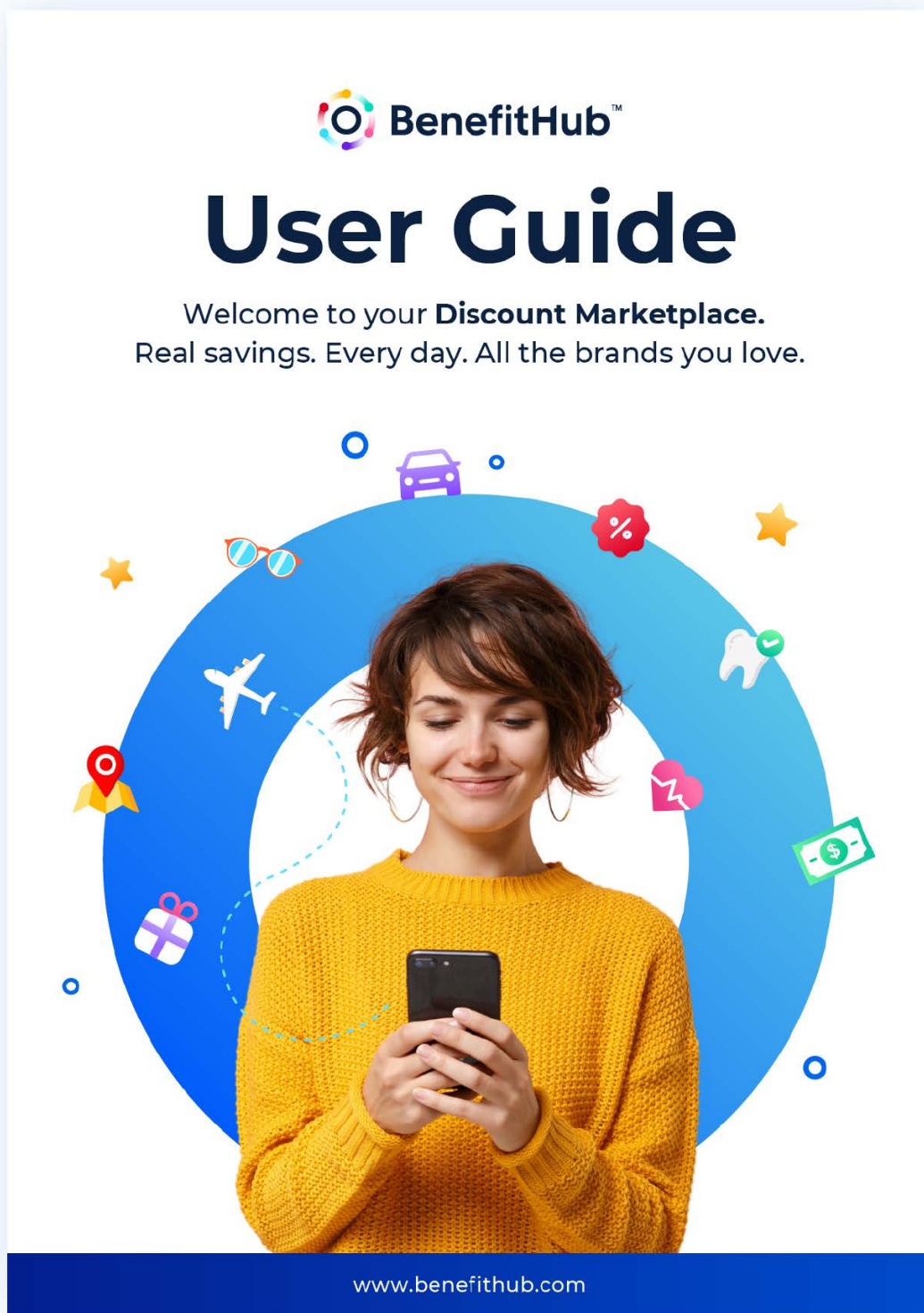
Sign Up and Start Saving!

- 1 Go to [Insert Your Discount Marketplace URL]
- 2 Enter your name and email address
- 3 Complete your registration

www.benefithub.com

User Guide

Provide your employees with a handy User Guide to answer any questions that they may have regarding your Discount Marketplace.





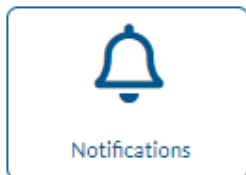
Notifications

As part of the communications features on the Admin dashboard, you can create notifications that display to the user on the site.

Notifications are a method of communication with users of your BenefitHub site – providing Admins with a way to send short messages about upcoming events, special deals, or important news. A notification can display with a severity level of High, Medium, or Low. You can also set the start and end date for when the notification displays.

Adding a Notification

1. From the Home page select **the Wheel Cog >> Communications and Select Notifications.**



2. Click **Edit** then **New Announcement.**

Announcements



 Edit



You have no notifications

3. The Add Notification section displays. Add the Title.

Announcements New Announcement Done

Edit Announcement

Title

Severity ^{*}

Please select a severity ▼

Message ^{*}

☰ ☷ **B** U *I* 🔗

Enter your text here...

☐ Set Duration?

Cancel

Save







4. Select the Severity level. Choose from High, Medium, and Low.
This corresponds to the color of the notification on the Home page:
Pink, Blue, Yellow.

5. Enter the notification content using the Rich Text Editor.

☰ ☷ **B** *I* U 🔗 📎 ✉

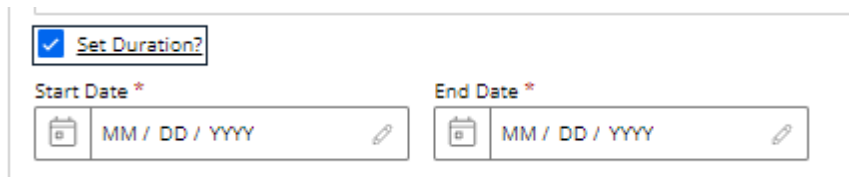
Enter content here...

You can format the text using the styling options including:

	Bulleted list
	Numbered list
	Make text Bold, Italics or Underline
	Link to an external site
	Link to content in the library
	Create an email address link

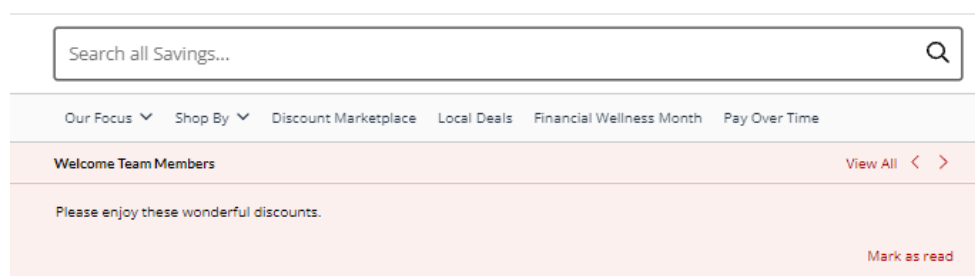
If you want to display the notification for a set time and then have it expire, check **Set Duration**.

The date field displays.



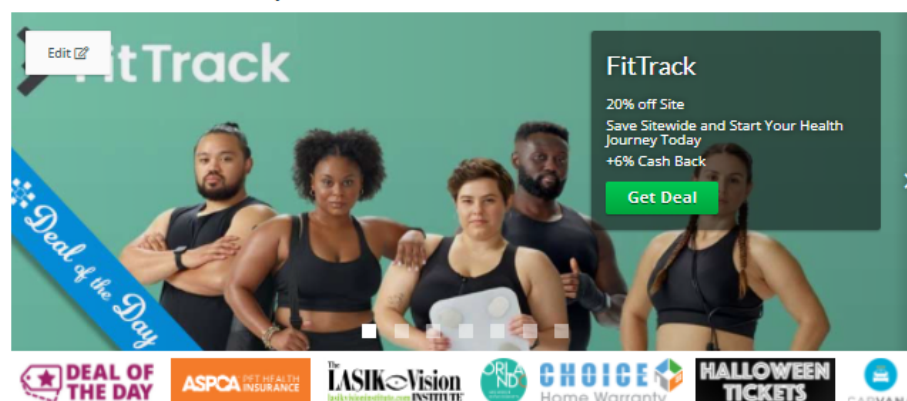
The screenshot shows a form titled "Set Duration?". It has two main sections: "Start Date" and "End Date". Each section includes a calendar icon, a text input field with the placeholder "MM / DD / YYYY", and a small edit icon. The "Set Duration?" checkbox is checked.

6. Select the start and end date to have the notification run for a date range or you can select a single day if desired.
7. Click **Save**. The notification is saved and displays on the home page based on the selected date range.
8. Users can close the message. This message will still be visible under their profile. You can also show multiple notifications for the user to scroll through.



The screenshot shows a user profile notification area. At the top is a search bar labeled "Search all Savings...". Below it is a navigation bar with links: "Our Focus", "Shop By", "Discount Marketplace", "Local Deals", "Financial Wellness Month", and "Pay Over Time". The main section is titled "Welcome Team Members" and contains a message: "Please enjoy these wonderful discounts." There are links for "View All" and "Mark as read".

Discount Marketplace



The screenshot shows a "Discount Marketplace" banner. The main feature is a "FitTrack" deal: "20% off Site", "Save Sitewide and Start Your Health Journey Today", and "+6% Cash Back". There is a "Get Deal" button. The banner also includes a "Deal of the Day" badge and a row of other deals: "DEAL OF THE DAY", "ASPCA PET OF THE MONTH INSURANCE", "LASIK Vision Institute", "ORLANDO CHOICE Home Warranty", "HALLOWEEN TICKETS", and "CARVANA".

Editing a Notification

You can edit an existing notification to change the content, dates and severity.

1. From the Home page click the **Wheel Cog >> Communications, then Notifications, click Edit.**
2. Locate the notification you want to update and click on the pencil (✎).



You can:

- Edit the Severity
- Edit the content using the Rich Text Editor options
- Add or edit a start and end date.

3. Click **Save**. Edits to the notification are saved.

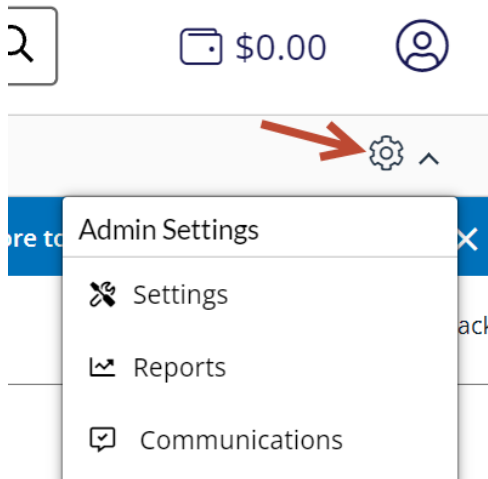
Deleting a Notification

You can delete an existing notification.

1. From the Home page click the **Wheel Cog >> Communications, then Notifications, click Edit.**
2. Locate the notification you want to Delete and click on the (🗑️). A confirmation message displays.
3. Click **Delete** and the notification is deleted or click **Cancel**.

Reporting

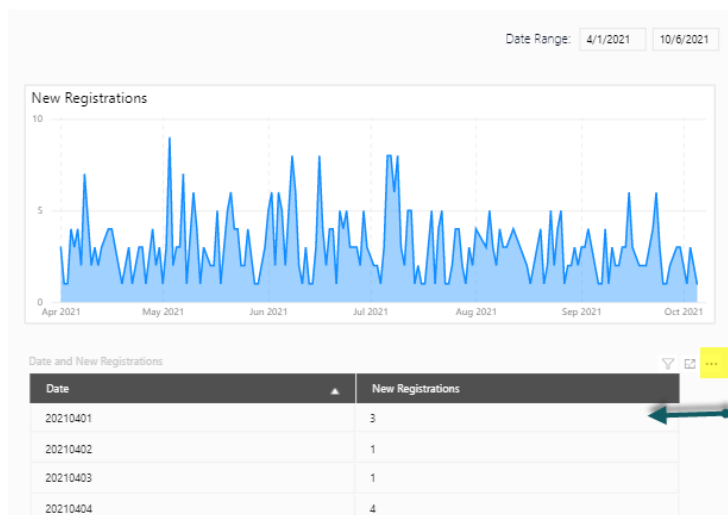
1. Click on the **Wheel Cog** and select **Reports**.



The Reports tab displays a summary of activity.

2. Click on **Site Usage** or **Discounts & Rewards** and select a report to display.





Each report shows a graph and daily tally.

All reports can be exported to Excel. First click into any cell in the chart as shown by the green arrow, then click on the 3 dots highlighted in yellow and select **Export Data**.

You can change the date range. Click on the date, and then from the calendars, select the start and end date. In some instances, you may need to change the end date first then the start date. The report data on the screen will be automatically updated.

