ChamberMaster/MemberZone – Working with the Membership Application Form

Agenda

- Setting up the Membership Application Form
- Approving an Membership Application submission

Setting up the Membership Application Form

- A custom membership application may be integrated with your website so that applicants may complete the form online, which places the member in your database without further entry on your part

- WIKI: Setup the Online Membership Application

Member Application

Business Information

Company Name: *

Phone: *

Email: *

Reason for Joining?: *
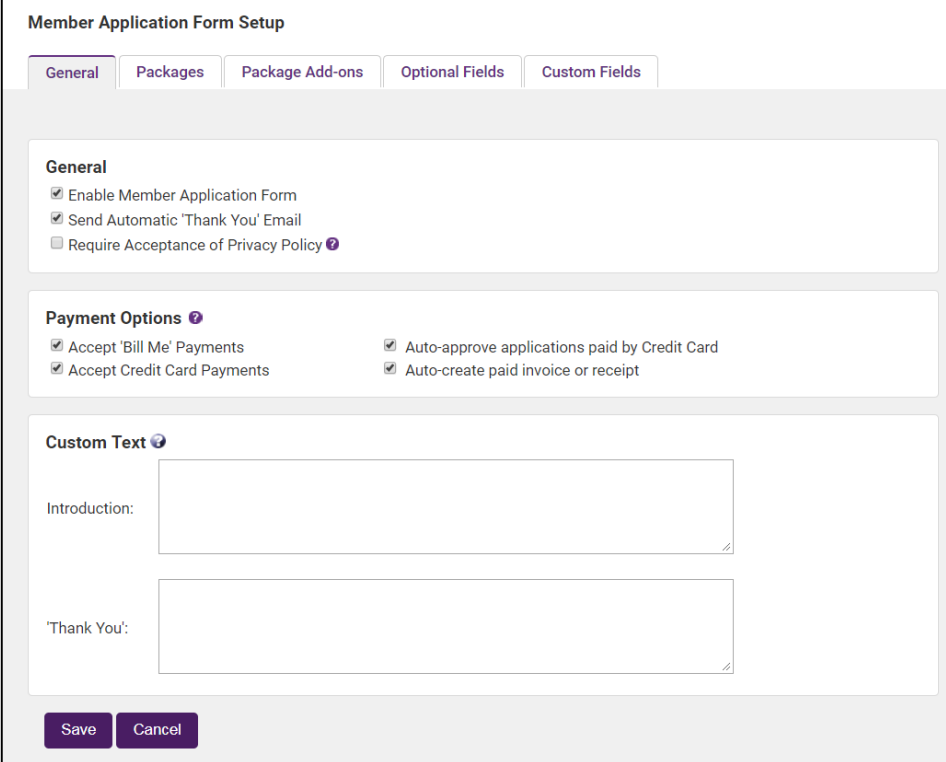
☐ Want to Volunteer?: *

Ownership: *

License #: *

Setting up the Membership Application Form

- REQUIREMENTS:
  - Plus or greater is required to receive credit card payment with the application
  - Your website must be integrated using the Search Engine Optimized method of integration
  - Your web designer or our integration team must place a link on your website that points to the Membership Application
  - Administrator level permissions are required to setup the Membership Packages

Setting up the Membership Application Form

- General Tab
  - Allows you to enable the application form, define how you will accept payment for on-line membership applicants, as well as the introduction & confirmation messages
  - WIKI: General Tab

Setting up the Membership Application Form

- Create Packages
  - You may create multiple membership packages to include on your membership application form
  - WIKI: [Packages Tab](#)

Setting up the Membership Application Form

- Package Add-Ons
  - Package Add-ons are items that would be in addition to a membership package.

Member Application Form Setup

General | Packages | **Package Add-ons** | Optional Fields | Custom Fields

Add New Package Add-on

Package Add-ons

Name	Display?	Order	Type	Fee	Required?	TaxSet		
1/4 Page Ad 1/4 Page Ad in Chamber Magazine	Yes	0	Fee Items	100.00	No		✎	✕
Brick at Veteran's Park honor the veterans and show your support	Yes	0	Fee Items	50.00	No		✎	✕
New Training Add-on New Training Add-on	Yes	0	Fee Items	100.00	No		✎	✕
Setup Fees Setup Fees	Yes	0	Fee Items	50.00	Yes		✎	✕
Sponsorship of Fishing Contest Sponsorship of Fishing Contest	Yes	0	Fee Items	75.00	No		✎	✕
Trade Show Sponsorship Trade Show Sponsorship	Yes	0	Fee Items	4000.00	No		✎	✕

Setting up the Membership Application Form

- Package Add-Ons
    - Examples would be an additional contribution, an advertising location on your website or an enhanced website listing (Requires Premier or Pro Editions)
    - This can also be used for a required add-on such as a membership application fee by making the add-on a required item
    - WIKI: Package Add-ons Tab

Optional Fields

- Optional Fields are standard Membership Application fields that you may choose to:
  - Hide
  - Display
  - Display/Require
- WIKI: Optional Fields

Optional Fields

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  - Hide
  - Display
  - Display/Require

- WIKI: Custom Fields Tab

Approving a Membership Application

- The Task List will notify when new on-line applications need to be approved

- WIKI: Adding a Member by Approving an On-line Application Form

Prospective Member Applications

Applied	Member Name	Action			
6/18/2018	Lola's Lolipops	Approve	Approve/Create Invoice	Create Invoice Only	Decline

Download List

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