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
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.
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

• Optional Fields are standard Membership Application fields that you may choose to:
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• 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
Thank You!

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