

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: *

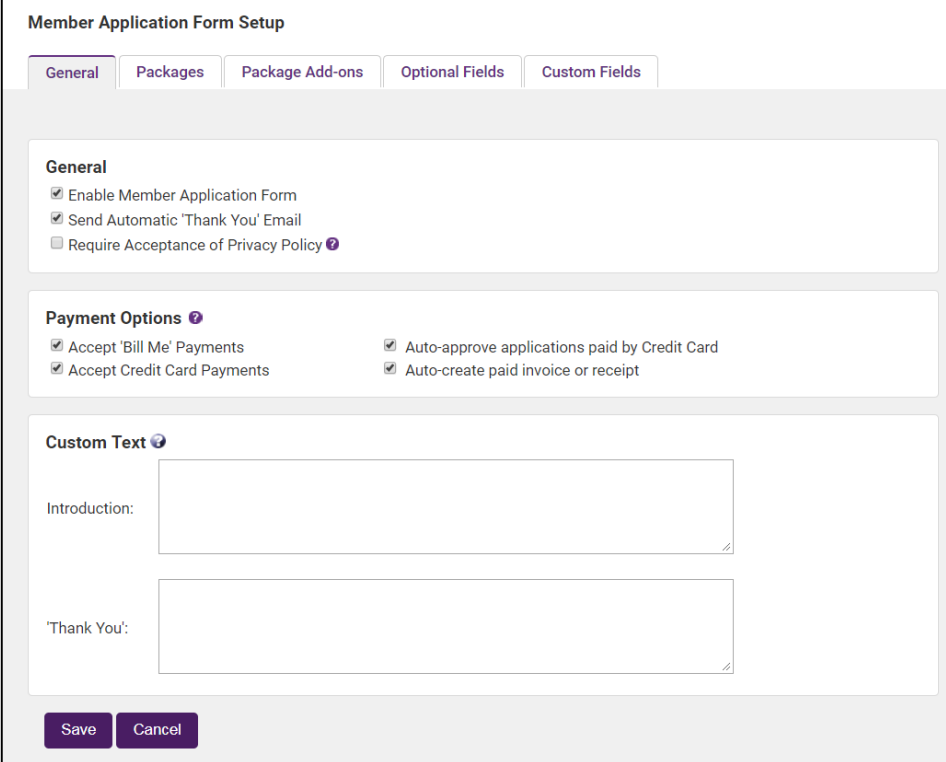
License #: *

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](#)



Member Application Form Setup

General Packages Package Add-ons Optional Fields Custom Fields

General

- Enable Member Application Form
- Send Automatic 'Thank You' Email
- Require Acceptance of Privacy Policy

Payment Options

- Accept 'Bill Me' Payments
- Accept Credit Card Payments
- Auto-approve applications paid by Credit Card
- Auto-create paid invoice or receipt

Custom Text

Introduction:

'Thank You':

Save Cancel



Setting up the Membership Application Form

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

Member Application Form Setup Feedback?

General Packages Package Add-ons Optional Fields Custom Fields

[Add New Package](#)

Packages						
Name	Display?	Order	Type	Fee	TaxSet	Membership Type
Bronze Membership Package basic membership discounted pricing on events business category listing on directory	Yes	0	Fee Items	1000.00		Bronze  

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 Feedba

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](#)

Member Application Form Setup

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

General

Option	Visibility
Show Primary Contact	Required ▼
Show Billing Contact	Required ▼

Member Section

Option	Visibility
Phone	Required ▼
Physical Address	Hidden ▼
Mailing Address	Hidden ▼
Email	Required ▼
Description	Hidden ▼
Keywords	Hidden ▼
Website	Hidden ▼
Directory Category	Hidden ▼
Employee Count	Hidden ▼
Comments/Questions	Hidden ▼
Social Networks	Hidden ▼

Primary/Billing Contact Section

Option	Visibility
Login Name & Password	Required ▼
Address	Required ▼
Phone Number	Required ▼
Cell Phone Number	Hidden ▼
Fax Number	Hidden ▼
Email	Required ▼
Social Networking	Hidden ▼
Title	Hidden ▼

Optional Fields

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 - Hide
 - Display
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- WIKI: [Custom Fields Tab](#)

Member Application Form Setup

General Packages Package Add-ons Optional Fields Custom Fields

Custom Fields

Field Name	Order	Visibility
Reason for Joining?	0	Required ▼
Want to Volunteer?	1	Required ▼
Are you interested in educational opportunities?	2	Hidden ▼
Do you want a ribbon cutting?	3	Hidden ▼
Ownership	4	Required ▼
License #	5	Required ▼

Save Cancel

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

Thank You!

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