



# Online Member Application

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# Setting up the Online Member Application

Setup > Member Options > Define Membership Packages

1. General tab
  - a. **General** - Enables the Online Member Application. The Send an automatic 'Thank You' email option sends a database generated email after the application has been submitted.
  - b. **Payment Options** – Bill Me allows the applicant to request to be invoiced for membership, Accept Credit Card Payments allows the applicant to pay with a credit card to complete the application process. You may choose 1 or both options. The option to Auto-approve applications paid by credit card will automatically approve an application that is paid by credit card and does not require staff to review and approve.
  - c. **Custom Text** – The Introduction text will show at the very top of the Online Member Application. The 'Thank You' text will customize the wording of the Thank you email sent after the application has been completed.

**Member Application Form Setup**

General Packages Package Add-ons Optional Fields Custom Fields

**General**

Enable Member Application Form **a**

Send Automatic 'Thank You' Email

**Payment Options** ⓘ

Accept 'Bill Me' Payments **b**  Auto-approve applications paid by Credit Card

Accept Credit Card Payments  Auto-create paid invoice or receipt

**Custom Text** ⓘ

Introduction: **c**

We would love to have you as part of our organization.

'Thank You':

Thank you for your time. We will be in touch soon.

Save Cancel

Make sure to click Save after updating this page.

## Packages tab

This tab allows you to add in the different options you have for membership. These options will show at the bottom of the Online Member Application and pending set up will update the new member record with the correct fee item or membership type.

### Adding in a new package

1. Click **Add New Package**
2. **Package Name and Description:** Add a package name and description. Both will be visible on the online application page.
3. **Display Package:** Should be checked in order for this package to be an option online.
4. **Display Order:** Lower numbers are displayed at the top of the package list.
5. **Membership Type:** Specify a specific membership type to be assigned when that package is selected.
6. **Fee Type**
  - a. **Fee:** Select this to specify a dollar amount for this package but not directly associate it with a fee item. With Fee selected, the Fee Amount field must be filled in.
  - b. **Fee Items:** Select this to specify a particular fee item that should populate when creating the invoice/receipt for this member. With Fee Items selected, the Amount and Fee Item Name must be filled in.
  - c. **Fee Schedule:** Select this to allow the applicant to lookup their fee in your provided schedule and input the amount manually on the form. To provide the schedule, click the Browse button on the Member Application Form Setup screen at the bottom of the Packages tab next to the New Fee Schedule filename field.
  - d. **Use 'Contact Us':** Select this if there is not a set dollar amount for this package. This will place wording next to this package on the website: "Please contact us to determine the fee".
7. **Tax Set:** Specifies the tax set for the fee.
8. **Fee Amount:** Set the amount for that membership package if the Fee option is selected.
9. **Fee Schedule:** Upload a file with your fee schedule that an applicant can view and calculate their own dues amount. Requires a package with a fee type of Fee Schedule to be used.

# Package Add-Ons

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

1. Click **Add New Package Add-on**
2. Populate the Add-on Name and Description. Both will be visible on the online application.
3. **Display add-on:** should be checked for the item to show on the online application.
4. **Display Order:** Lower numbers show higher in the list of add-on items.
5. **Required Add-on:** Makes this add-on a requirement. Useful for items such as a member application fee.
6. Fee Type:
  - a. **Fee:** Select this to specify a dollar amount for this package but not directly associate it with a fee item. With Fee selected, the Fee Amount field must be filled in.
  - b. **Fee Items:** Select this to specify a particular fee item that should populate when creating the invoice/receipt for this member. With Fee Items selected, the Amount and Fee Item Name must be filled in.
  - c. **Fee Schedule:** Select this to allow the applicant to lookup their fee in your provided schedule and input the amount manually on the form. To provide the schedule, click the Browse button on the Member Application Form Setup screen at the bottom of the Packages tab next to the New Fee Schedule filename field.
  - d. **Use 'Contact Us':** Select this if there is not a set dollar amount for this package. This will place wording next to this package on the website: "Please contact us to determine the fee".
7. **Tax Set:** Specifies the tax set for the fee.
8. **Fee Amount:** Set the amount for that membership package if the Fee option is selected.

The screenshot shows a web form titled "Add Package Add-on" with a close button (X) in the top right corner. The form contains the following fields and controls, each with a red circle and a number indicating its position in the list:

- 1. Add-on name: A text input field.
- 2. Description: A text area with scrollbars.
- 3. Display Add-on?: A checkbox.
- 4. Display Order: A text input field containing the number "0".
- 5. Required Add-on?: A checkbox.
- 6. Fee Type: A dropdown menu with "(none)" selected.
- 7. Tax Set: A dropdown menu with "(none)" selected.
- 8. Fee amount: A text input field containing the number "0".

At the bottom right of the form, there are two buttons: "Save" and "Cancel".

# Optional Fields Tab

You can change the visibility of each section of fields here to be either hidden, optional or required.

**Hidden** fields won't show on the online application screen.

**Optional** fields will be displayed but don't have to be used.

**Required** fields will be displayed and must be filled in.

### Member Application Form Setup

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

#### General ?

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

#### Member Section

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

#### Primary/Billing Contact Section

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

Save Cancel

## Custom Fields

These options are created in Members > General Tab > [Custom Fields](#) once they are created here you will have access to them for the Member Application setup.

This section allows you to display member custom fields and make them hidden, optional or required.

Hidden fields won't show on the online application screen.

Optional fields will be displayed but don't have to be used.

Required fields will be displayed and must be filled in.

# Approving the new member application

1. Go to the Task list in the lower left hand corner of the database.
2. Click on Mbr Signups

**Task List**

2 Mbr Signups

0 Hot Deals

1 MarketSpace

3. On the Pending Applications tab you will see the pending applications.

Pending Applications    Application History

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**Prospective Member Applications**

Applied	Member Name	Action
1/5/2016	<a href="#">Pippy's Pizza</a>	<a href="#">Approve</a> <a href="#">Approve/Create Invoice</a> <a href="#">Create Invoice Only</a> <a href="#">Decline</a>
1/5/2016	<a href="#">MicroNet</a>	<a href="#">Approve</a> <a href="#">Approve/Create Receipt</a> <a href="#">Create Receipt Only</a> <a href="#">Decline</a>

[Download List](#)

4. To review the application information you can click on the Member Name to review the basic information

Pending Applications    Application History

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**Prospective Member Applications**

Applied	Member Name	Action
1/5/2016	<a href="#">Pippy's Pizza</a> <b>Primary Contact:</b> Pippy Elizabeth <b>Membership Package:</b> 1-10 employees <b>Members:</b> Full Time: 0, Part Time: 0 <b>Business Category:</b> <b>Comments/Questions:</b> <b>Physical Address:</b> <b>Mailing Address:</b> 456 Sauce way Nisswa, mn 56468 <b>Phone:</b> 456-789-1056 <b>Website:</b> <b>Billing Status:</b> Member requested to be billed.	<a href="#">Approve</a> <a href="#">Approve/Create Invoice</a> <a href="#">Create Invoice Only</a> <a href="#">Decline</a>
1/5/2016	<a href="#">MicroNet</a> <b>Primary Contact:</b> Bob Hope <b>Membership Package:</b> 1-10 employees <b>Members:</b> Full Time: 0, Part Time: 0 <b>Business Category:</b> <b>Comments/Questions:</b> <b>Physical Address:</b> <b>Mailing Address:</b> 24400 Smiley Rd Nisswa, MN 56468 <b>Phone:</b> 800-825-9171 <b>Website:</b> <b>Billing Status:</b> Member chose to pay by credit card. Transaction successful. Credit card: VISA, **** 0027.	<a href="#">Approve</a> <a href="#">Approve/Create Receipt</a> <a href="#">Create Receipt Only</a> <a href="#">Decline</a>



## Action

1. **Approve:** This option will approve the application but will not generate billing information. This would need to be done separately.
2. **Approve/Create Invoices:** This option will approve the application and direct you to the invoice tab to create and send the invoice or receipt based on payment option.
3. **Create Invoice or Receipt Only:** This will leave the application in prospective status and redirect you to the invoice or receipt screen to create and send the invoice or receipt.
4. **Decline:** This will remove the application from the task list but keep the information in the database as a prospective member record.

Choose the best option based on your approval process.