Applications

Applications lets you create a sign up process for new site members or catalog owners.

Topics

How do I locate application set up?

How do I set up applications?

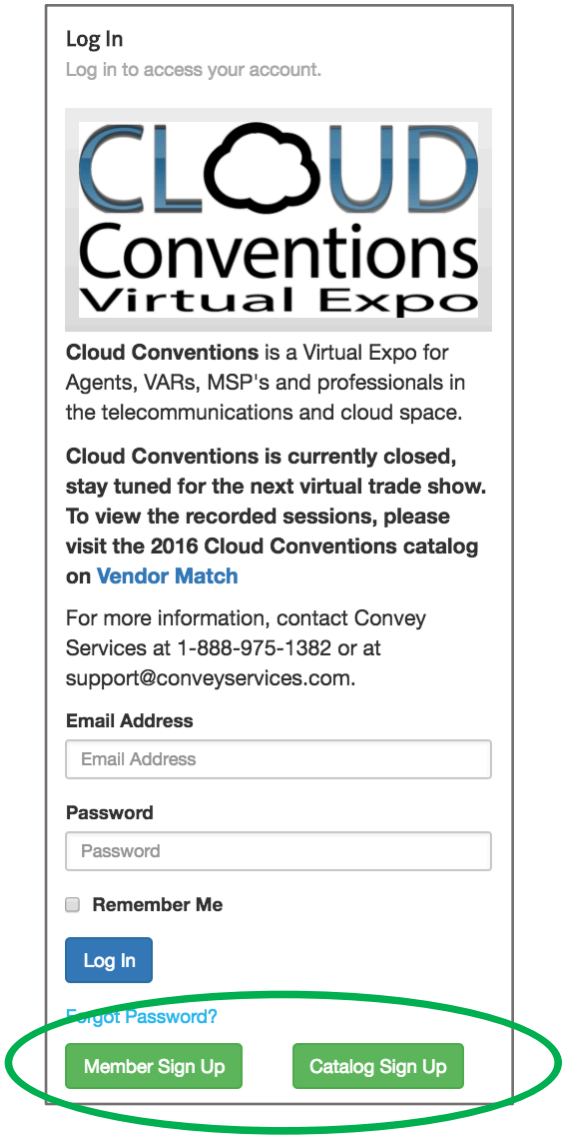
Can I set up an approval process?

How do I add a form to collect application information?

Can I charge for membership or catalog ownership?

How to I confirm my application and make it active on the site?

Applications



Applications let you create a sign up process for new site members or catalog owners. Set an application up by adding a title, text and graphics, then creating a form to collect information. Form data will automatically be added to the site administrative database.

Applications can have an approval process to allow designated site administrators to approve applicants before admitting them as members or catalog owners.

The sign up button appears on the login screen.

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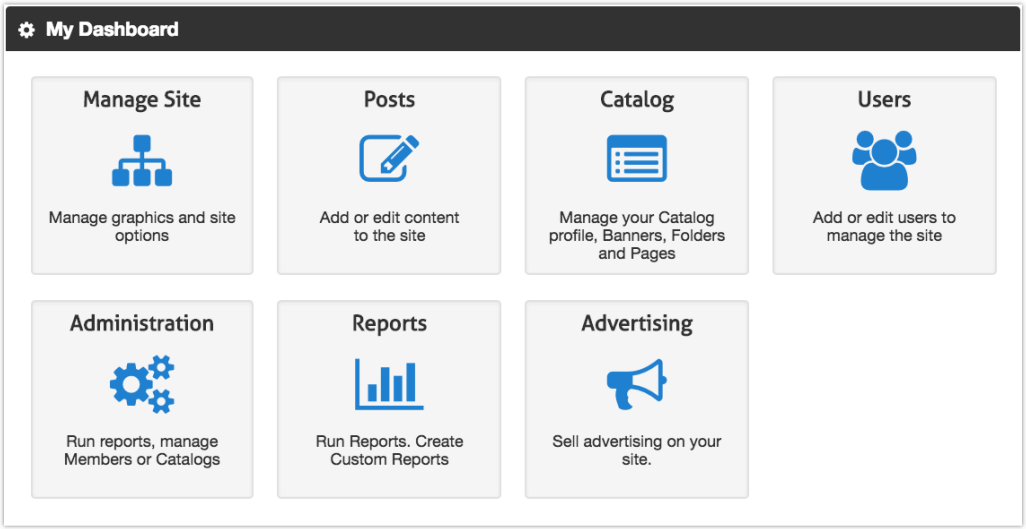
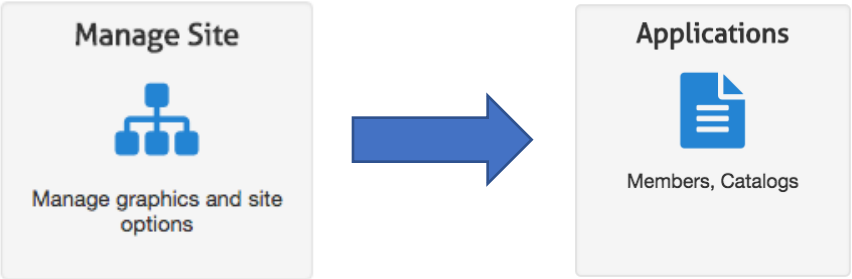
How do I locate this feature?
From your Dashboard, select Manage Site, then select Applications. From there, turn the application on for members or catalogs. Select either Member or Catalogs to set up the application process.





QUICK TIP

Click "On or Off" to manage an existing application and to display the sign up page for an applicant. Set up an application and leave it "off" until you are ready to make it active on the site.

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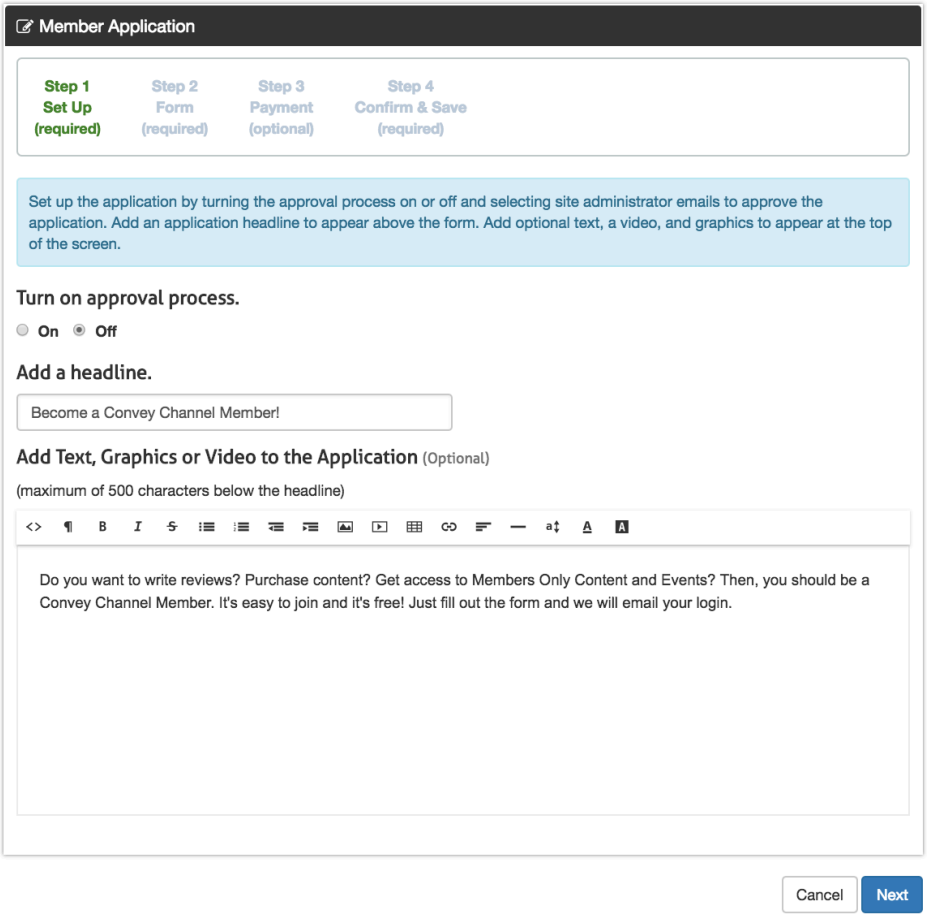

How do I set up an application?
The application is set up in a wizard. In Step 1 turn the approval process on or off. Next, add a headline and text and graphics that can be seen on the application page.

QUICK TIP

The set up process is exactly the same for Members and Catalogs. The wizard will take you through all of the steps.

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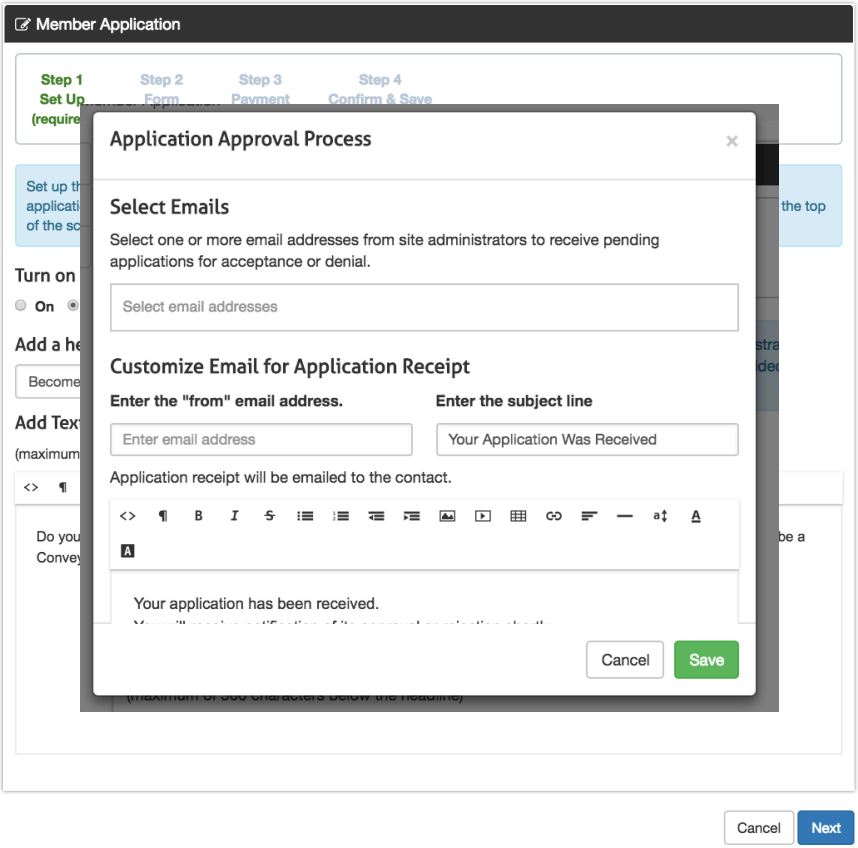

How does the approval process work?

If approval is on, a site administrator will be notified that there is an application. They must approve the application before the member or catalog can receive their login information.

Turn approval on, then select site administrator emails to approve the application. Set up the email that applicants receive when their application has been delivered, the welcome email if it is approved and the email if it is rejected.

QUICK TIP

Site administrators can approve an application when they receive an email from the site when a new individual applies or from the administration section in the site.

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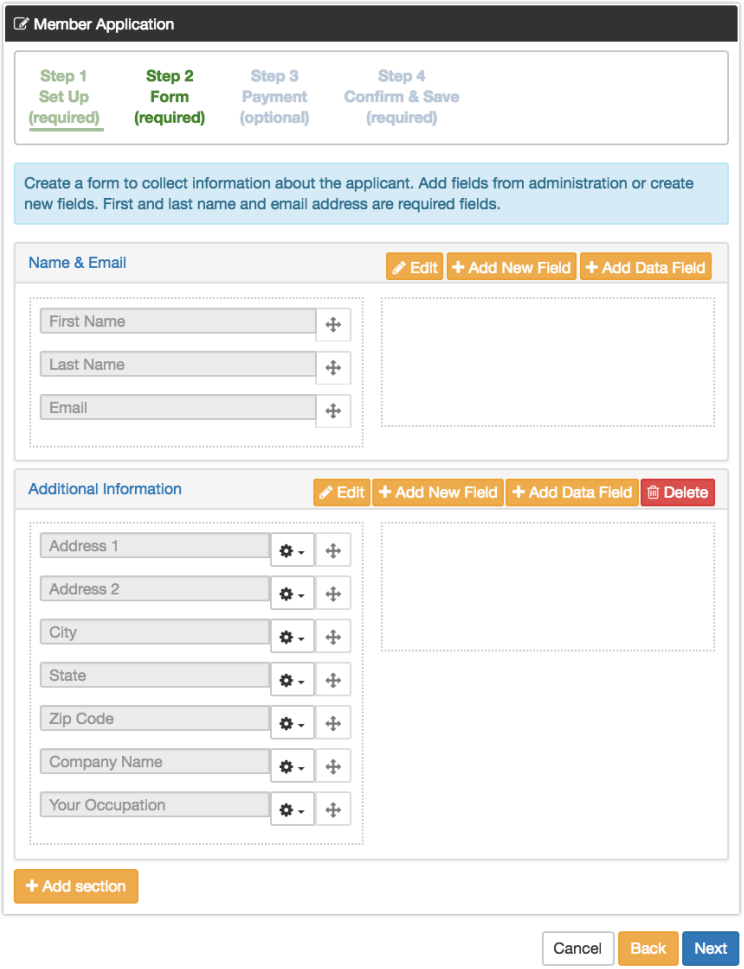
Applications | Locate | Set Up | Approval | **Form** | Payment | Confirm & Save

Applications



How do I add a form to an application.

Step 2 of the wizard allows you to create a form. Divide the form into sections by selecting the "Add Section" button and entering a section name.

Add fields to a section by selecting "Add New Field" and then customizing that field. Click "Add Data Field" to add a field from administration to the application.

Create two columns by moving the field to the right or left of the screen.

QUICK TIP

New fields added to the application can be "tagged" to go into administration. A field already in administration can be added to the application.

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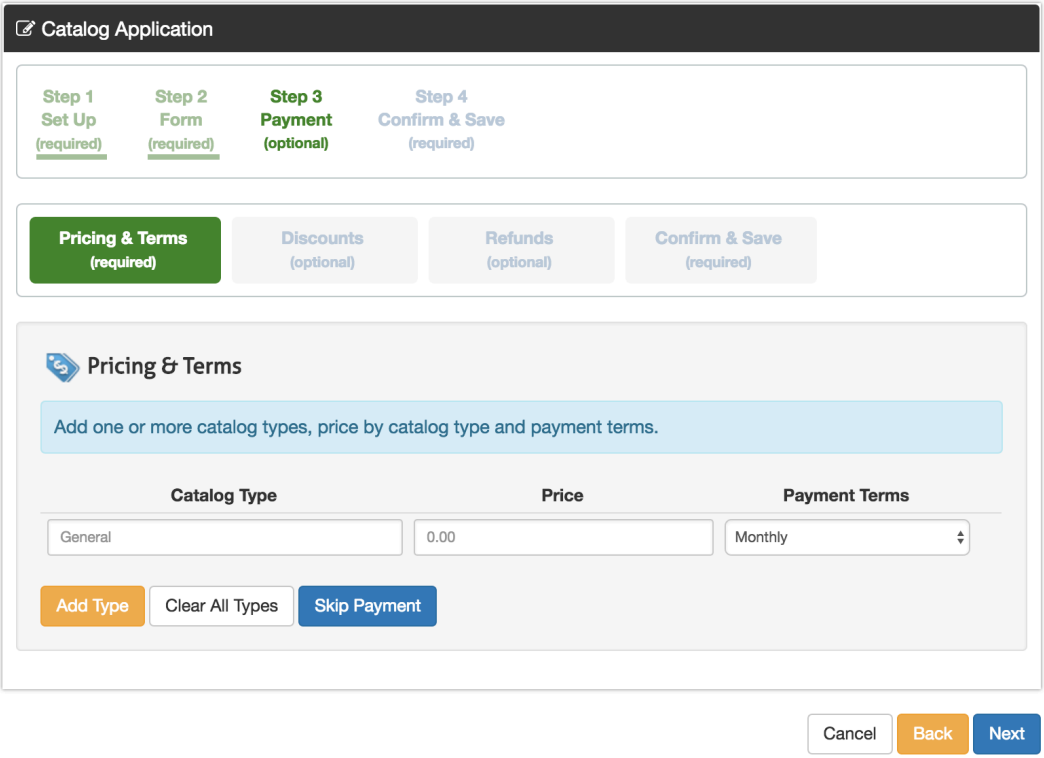
Can I charge for membership or to be a catalog owner?
Yes. Step 3 lets you customize payment by selecting a member or catalog type, entering a price, and setting the payment terms (monthly, quarterly or annual). The wizard will then allow you to add promotional codes, discounts and a refund policy.



QUICK TIP

If you are not charging applicants, select "Skip Payment" and be taken to the final step to confirm and save the application.

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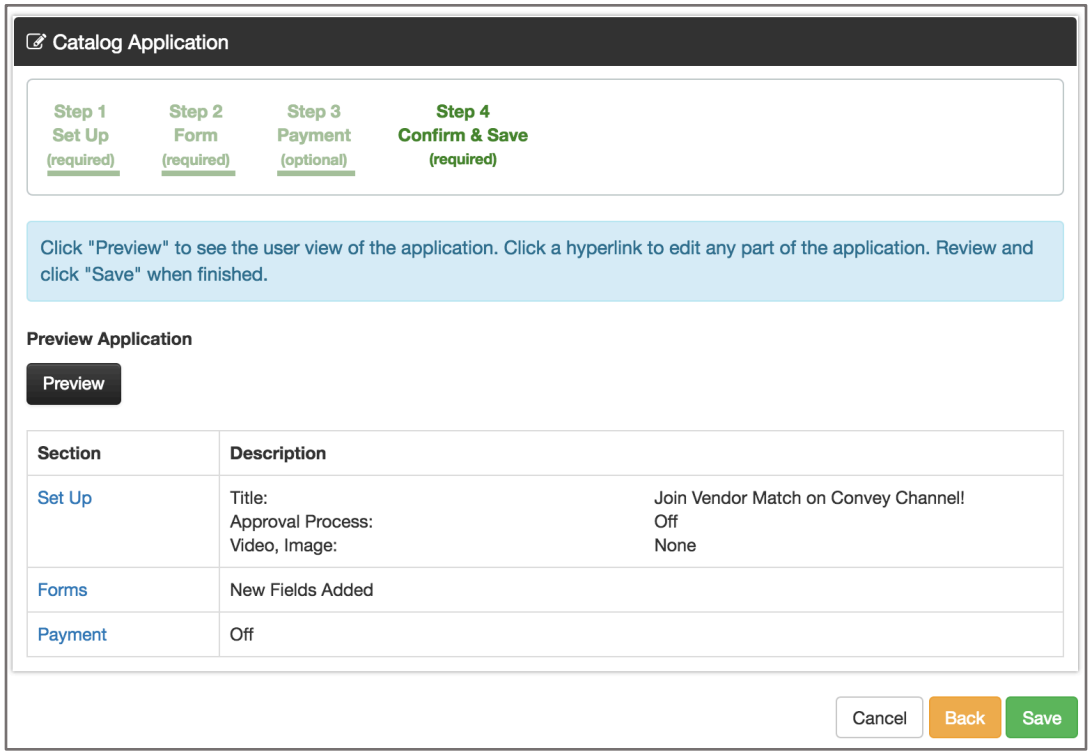
How do I finalize my application?

Step 4 of the wizard allows you to confirm the application, go back to a previous step to make changes, and then save it to make the application active.



QUICK TIP

Go back to any previous step by hitting the orange back button, make changes, and then proceed back to step 4 to finish the application.