

# ProFusion



## *Membership Manager*

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# Description

The ProFusion Ultra IS Membership Module is a searchable database of the members of a group, association, organization, etc. Members can purchase a membership directly from the frontend of your website and enter their information themselves. Purchased memberships are good for 1 year, after which members will be eligible to renew their membership online.

The screenshot shows the ProFusion UIS website backend interface. The top navigation bar includes 'ProFusion UIS | View Website', the ProFusion logo, and links for 'Website Backend | Profile | Quick Links | About Us | Logout'. The left sidebar is divided into three sections: 'CONTENT' (Home Page, Inner Pages, Unpublished Pages, Sitemap, Terms and Conditions, Privacy Policy, Vertical Column Section, Footer Section), 'WEBMASTER' (Change Profile, Change Password, Settings, Header Images), and 'ADVANCED FEATURES' (Banner Manager, Classifieds Manager, Content Rotator). The main content area displays a welcome message: 'Welcome to the backend of ProFusion v3.9 Pre Production. Please follow the links on the left column to proceed.' Below this, it shows the server date and time: 'The Date and Time on the servers is currently 2/21/2012 3:31:45 PM'. A 'Storage' section provides a comparison of free and used space:

Storage	
Free Space	Used Space
<b>1023.67 MB</b>	<b>26.33 MB</b>
File System : 977.73 MB	File System : 22.27 MB
Database : 45.94 MB	Database : 4.06 MB

A 'Quick Links' section at the bottom offers links to 'User Manuals and Product Videos', 'Support Center', 'Editor Help', and 'License Agreement'.

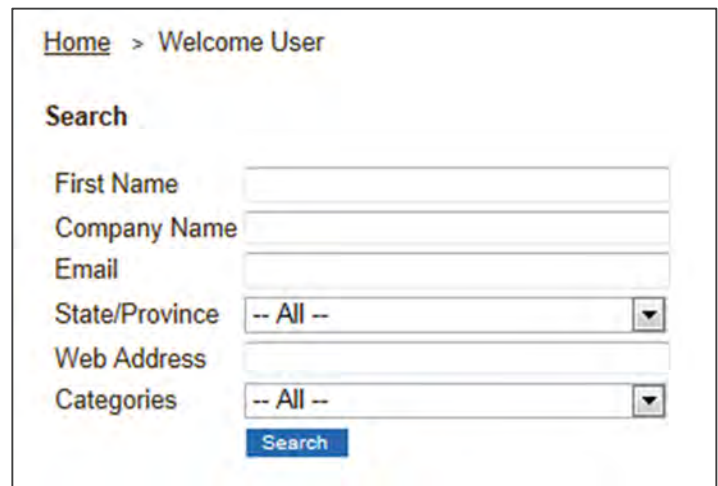
## Finding the Module

The left side of the main administrative page is divided into various sections. Each section deals with a specific functionality of the ProFusion Ultra IS application like Content, Secure Users, Help, Webmaster, Advanced Features, etc. Membership Module can be found under the Secure Users section once it has been added to your site.

# Create Category

To enable front-end users to search using the fields you have selected, the membership directory TPL must be placed somewhere on the site. The membership directory as it shows on the frontend shown to the right.

Click on *Membership Manager* to access the module. This will take you to a page like the one below which shows all members, their status (active, not active, expired), the date of their last login, the renew date, and a field to edit the member.



Home > Welcome User

Search

First Name

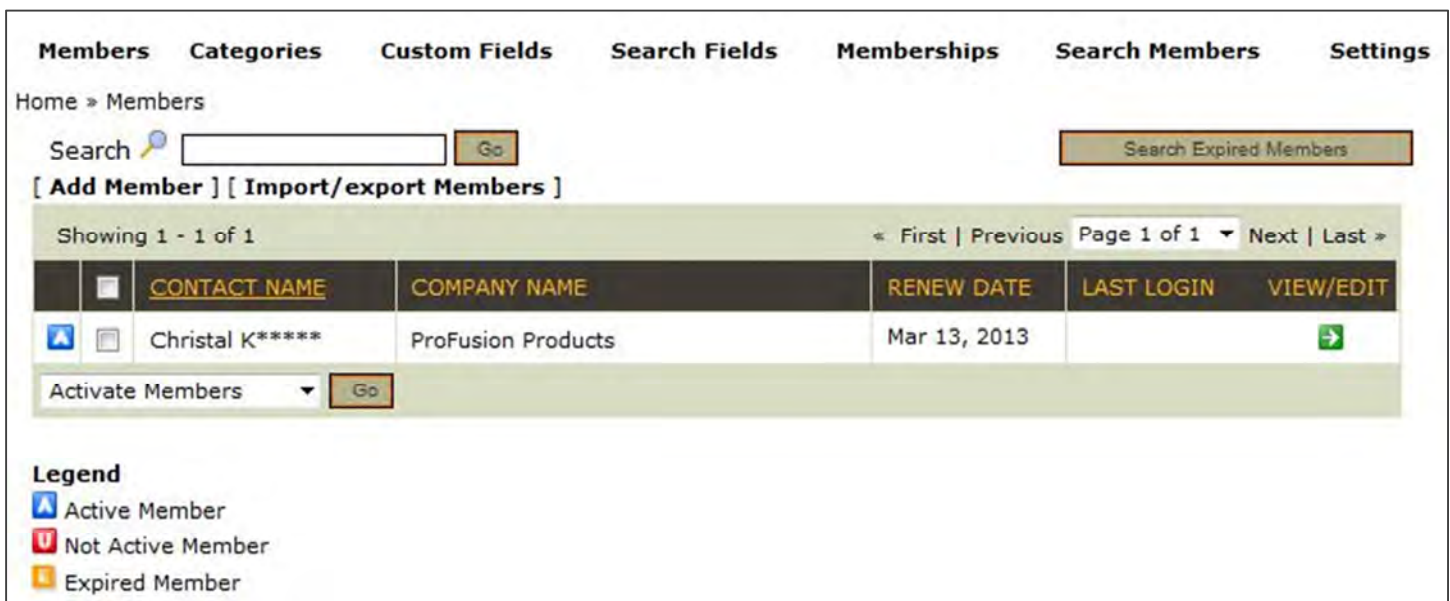
Company Name

Email

State/Province -- All --

Web Address

Categories -- All --



Members Categories Custom Fields Search Fields Memberships Search Members Settings

Home > Members

Search

[ Add Member ] [ Import/export Members ]

Showing 1 - 1 of 1 < First | Previous Page 1 of 1 Next | Last >

	CONTACT NAME	COMPANY NAME	RENEW DATE	LAST LOGIN	VIEW/EDIT
<input type="checkbox"/>	Christal K*****	ProFusion Products	Mar 13, 2013		<input type="button" value="View"/>

Activate Members

**Legend**

- Active Member
- Not Active Member
- Expired Member

A category allows you to segment your list of members. If your membership consists of business people, your categories might be things like Plumbers, Consultants, Graphic Artists, Lawyers, etc. To add a category:

1. Click on the *Categories* link at the top of the page and then click *Add New Category*.
2. On the Add/Edit Category form, **Type** in the Category Name and, if desired, a description (which will only be visible on the backend) and **Click Save**.
3. Repeat step 2 for until the desired number of categories are created.

# Create Membership Levels

Membership levels allow you to sell different levels of memberships. Bronze, Silver and Gold levels are good examples of a membership level. **Note:** — Membership levels are only applicable to the Membership module if you are using the Cart to sell memberships.

1. Click on the *Memberships* link at the top of any page of the Membership Module in the backend of the website. This will take you to a page like the one shown below.

Members Categories Custom Fields Search Fields Memberships Search Members Settings

Home > Manage Membership Products

Category --Select--

General Search

Search

[ Add New Membership ]

Showing 1 - 2 of 2 < First | Previous Page 1 of 1 Next | Last >

	PRODUCT NAME	SKU#	ORDER	VIEW/EDIT
	Gold	1	↑ ↓	→
	Gold-Renewal	1-REN	↑ ↓	→

Activate Product(s) Go

2. Click *Add New Membership*.
3. Enter the *Product Name*, an *SKU#*, and **Choose** the *Membership* category. You can also choose to enter short and long descriptions of your membership. Below the content editor area, list price of the membership, and enter an image if desired. The item quantity will automatically be set to 1.
4. Enter the appropriate information in any of the other optional fields as desired.
5. Click *Save* to add the membership. Repeat steps 2 – 4 until the desired number of categories are created.

**Note:** When you create a new item in the Membership category, a Renewal item of the same membership will be created automatically. Click on the item to edit the details - such as the list price - for the renewal version of a membership if you wish them to be different from the membership you have just created. A renewal membership cannot be purchased unless a new version of the membership has already been purchased.

# Custom Fields

Custom fields allow administrators to add new fields in which members may submit details which are not already included in the membership module. For example, if you were creating memberships for crafters, you could create fields where the members could enter their favorite types of crafts, such as knitting, crochet, sewing, scrapbooking, etc.

To create a custom field, **Click *Custom Fields*** at the top of the screen inside the *Membership Manager*. This will take you to a page like the one shown here.

<u>Members</u>	Categories	Custom Fields	Search Fields	Memberships	Search Members	Settings
<b>ADD/EDIT CUSTOM FIELDS</b>						
Custom Field Title 1		<input type="text"/>		Web address		
Custom Field Title 2		<input type="text"/>		Text		
Custom Field Title 3		<input type="text"/>		Text		
Custom Field Title 4		<input type="text"/>		Text		
Custom Field Title 5		<input type="text"/>		Text		
Custom Field Title 6		<input type="text"/>		Date		
Custom Field Title 7		<input type="text"/>		Date		
Custom Field Title 8		<input type="text"/>		Date		
Custom Field Title 9		<input type="text"/>		Number		
Custom Field Title 10		<input type="text"/>		Number		
			<input type="button" value="Save"/>			

The right column of the Add/Edit Custom Fields page describes the type of answer that the form will require. This means that in the web address field, the answer must contain a .com, .net, etc. to be accepted upon submission. Similarly, a date field must have a date entered in the correct format to be accepted, and this field will be accompanied by a calendar icon which allows the user to select the correct date instead of typing it in.

To add a custom field:

1. **Type** the desired question or field title into the text box next to the type of answer desired.
2. **Click *Save*** to create fields.

# Place Module

Before frontend users can use the membership module, it must be placed on a page of your website. There are three different TPL variables for this module:

- *Directory*— This shows all members alphabetically and has a search bar.
- *Recent Members*— This shows the 5 most recent members listed by Company Name.
- *Featured Members*— This shows all featured members.

1. **Navigate** to the page where you wish to place the membership module.
2. **Position** the cursor inside the text area where you would like to display the module and **Select** the proper TPL variable (here we are using Membership - Directory) from the Template Variables drop down menu.
3. Once this is placed, you will now see something like [TPL\_MEMBER\_DIRECTORY] inside the page editor area. This command instructs the system to merge in the module that you have just placed on this page. Click *Save* to save the page edits.



# Configure Search Fields

Members	Categories	Cust
<a href="#">Home</a> » <a href="#">Members</a> » <a href="#">Select Search Crit</a>		
<b>[ Select Search Result Fields ]</b>		
Fields with a check next to them will be displayed, please leave them checked.		
<input checked="" type="checkbox"/> CHECK ALL		
<input checked="" type="checkbox"/>	First Name	
<input type="checkbox"/>	Last Name	
<input type="checkbox"/>	Business Title	
<input checked="" type="checkbox"/>	Company Name	
<input checked="" type="checkbox"/>	Email	
<input type="checkbox"/>	Address 1	
<input type="checkbox"/>	Address 2	
<input type="checkbox"/>	City	
<input checked="" type="checkbox"/>	State/Province	
<input type="checkbox"/>	Country	
<input type="checkbox"/>	Zip/Postal Code	
<input type="checkbox"/>	Office Phone	
<input type="checkbox"/>	Cell Phone	
<input type="checkbox"/>	Fax	
<input checked="" type="checkbox"/>	Web Address	
<input checked="" type="checkbox"/>	Categories	
<input type="checkbox"/>	Featured Categories	
<input type="checkbox"/>	Company Description	
<input type="checkbox"/>	Notes	

One of the basic functions of the Membership Module is a searchable membership directory. This allows registered users to be found based on a number of different criteria.

To enable users to search members, the membership directory TPL must be placed somewhere on the site. The membership directory as it shows on the frontend is shown below.

The *Search Fields* link at the top of every page of the Membership Module takes you to a page like the one to the left. This page allows you to select which search criteria fields of members' information are searchable from the frontend of the site.

The *Select Search Results Fields* link at the top of this page allows you to select which fields will display in the results of a search on the frontend. It is the same as the list on the left with the addition of two fields: to display the members' photos and logos. You can return to the search criteria fields page by **Clicking** the link at the top of the page.

To edit these fields, **Click** the check box next to the field that you want to make searchable from the frontend of the site and **Click Save**.

Search	
First Name	<input type="text"/>
Company Name	<input type="text"/>
Email	<input type="text"/>
State/Province	-- All -- <input type="button" value="v"/>
Web Address	<input type="text"/>
Categories	-- All -- <input type="button" value="v"/>
<input type="button" value="Search"/>	

# Add Member from Backend

1. In the *Membership Manager*, Click the *Members* link at the top of the page.
2. Click *Add Member*.
3. **Type** the new member's information into the appropriate fields, making sure to fill out all of the required fields.
  - *First and Last Name*
  - *Business Title*
  - *Company Name*
  - *Email*
  - *Password and Login ID*— These allow members to update their information at any time, including uploading an image and logo.
  - *Address*
  - *Phone/Fax numbers*
  - *Web Address*— Link to your company or personal website.
  - *Categories*— These are the categories which were created earlier.
  - *Featured Categories*— Members who are “Featured” will be displayed in a section above the rest of the people in that category, essentially making them first on the list.
  - *Membership Level*— These are the levels which were created earlier in the shopping cart.
  - *Company Description*
  - *Notes*— This is for Admin use only and does not show on the frontend.
  - *Photo and Logo*
  - *Never Expires*— Allows you to create memberships which never expire.

**Note:** Memberships can be pre-set ([in Settings](#)) to expire after 1 year globally unless *Never Expires* is set to yes.
4. Click *Save* to create a new member.



# Add Member from Frontend

## Shopping Cart Registration

To add a member from the frontend by purchasing a membership, the shopping cart must be placed and active on the frontend of your website.

1. **Navigate** to the *Shopping Cart* on the frontend of the website and **Click** on the *Memberships* category.
2. **Select** the membership you wish to purchase.
3. **Select** the quantity you wish to purchase, then **Click** *Add to Cart*.
4. When you are finished adding items to your cart, **Click** *Checkout*.
5. **Select** the type of checkout you desire, either logging in with an existing user, registering a new user, or using Express Checkout.
  - If Express Checkout or Register a New User is being used, enter the required information into the form and **Click** *Save and Proceed*.
6. Review the information shown, and if everything is correct, **Click** *Checkout*. You will be taken to whichever payment method is set up with the shopping cart. Enter the correct information to complete your payment.
7. Once your payment method is approved, you will be prompted to configure your membership. **Click** *Configure Membership*.
8. Complete the provided form (fields are the same as when entering a new member from the backend with some admin-only options removed) and **Click** *Save* to submit.

## Non-Shopping Cart Registration

To add a member from the frontend without using the shopping cart, simply place the *Membership – Registration* TPL to the frontend of the site. New users Enter the required information (same as above) to register.

**Note:** Information entered into the provided fields will be submitted to the administrators, but will not be shown on the membership directory on the website unless the check mark to the left of the field is selected.

# Activate New Member

Once a new member is registered through the frontend, they must be approved by an administrator. Members added from the backend do not need to be approved. To activate a new member:

1. **Click** *New Members* under the Secure Users section on the left side of the backend of the website (just above *Membership Manager*).
2. **Select** the checkbox next to the member you wish to activate.
3. **Click** *Go* to save.

## Frontend User Features

**To Edit Your Profile,** Click *Login* at the top right of the frontend of the website. Enter your username and password and **Click** *Login*.

**Note:** The user will automatically be taken to the User Home page when they log in. You can edit this page by **Clicking** *Members Page Content* under Secure Users on the left side of the Admin Page.

**Click** *My Profile* to edit the list of basic information that you entered under *Configure Membership*. **Click** *Save* to save changes to your profile.

**To Add Employees,** Click the *Employees* tab between Profile and User Home at the top of the My Profile page. **Click** *Add New Employee* on the employees page. **Enter** the employee's information in the appropriate fields and **Click** *Save Employees* to save changes.

Adding employees allows them to be searchable through the frontend of your site. This allows for memberships to be purchased by a company, but for all employees of that company to be within the database.

# Expired Memberships

The Search Expired Memberships feature allows you find expired or soon-to-be expired members so that you can invite them to renew their memberships. This feature is best used in conjunction with the ProFusion Ultra IS Mailer. When a membership expires, their information becomes deactivated but is retained in the module.

To find any expired members:

1. Click *Search Members* at the top right of the page.
2. **Enter** the expiration date range you wish to find.
3. Click *Export Results*. This will save the results of your search as a .CSV file which can then be used to send email reminders to those members.

# Settings

Click *Settings* at the top right of the backend of the Membership Module. This will take you to a page like the one below. From here you can configure several global settings for the Membership Manager.

Members Categories Custom Fields Search Fields Memberships Search Members Settings

Home » Members » Settings

(Fields marked \* are mandatory.)

**SETTINGS**

Configure Membership Purchase memberships and configure ▼

Photo Dimensions\*  X  px **At least one value, Width or Height is required**

Logo Dimensions\*  X  px **At least one value, Width or Height is required**

The first allows you to choose whether or not to integrate the shopping cart into the membership manager. If “Fill out registration form on frontend” is selected, users can fill out the registration form directly from the frontend without going through the shopping cart or making a purchase. If “Purchase memberships and configure” is selected, the shopping cart is integrated and becomes part of the registration process.

If the check box next to “Auto-expire Membership” is selected, then all memberships will automatically expire after one year, unless a specific member is set to [never expire](#).

The “Photo and Logo Dimension” fields allow you to set the dimensions of the membership photos and logos. To allow for some flexibility in these fields, either max height or width may be set and the other field left blank, which will allow it to vary to fit the dimensions of the image entered.