

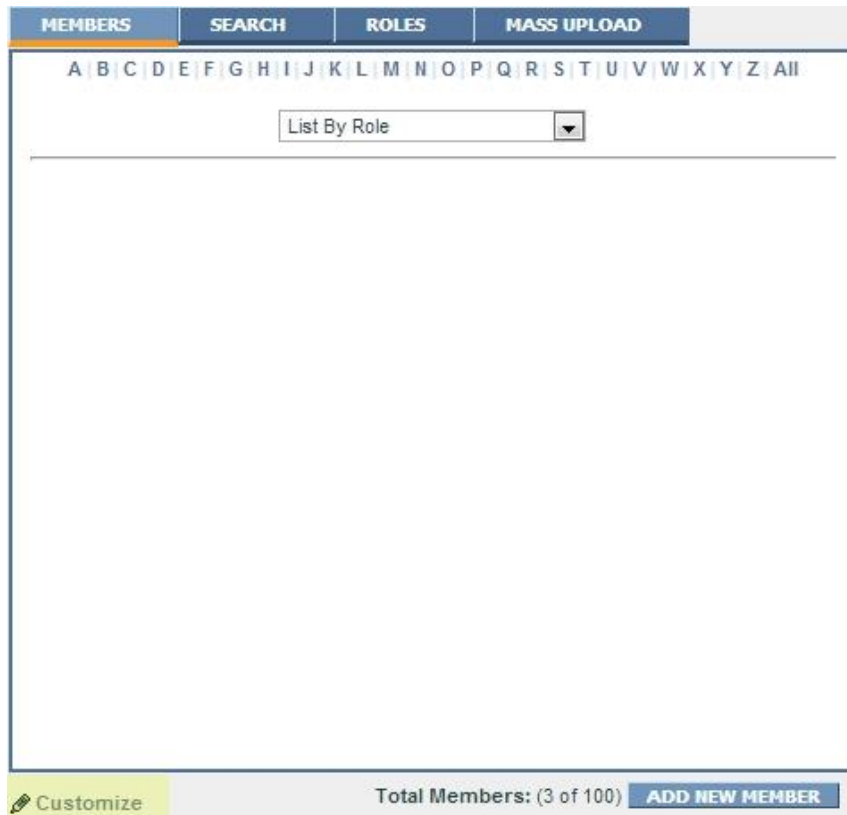
Customizing Membership Fields

You can use SiteCM and Membership to customize your SiteCM Membership fields, so that they display the fields of your choice within the membership area in the SiteCM manager, and on the Front End of the website as well within a Member Edit scenario.

1. First step is to visit the Membership Area within SiteCM.



2. Click the Customize Fields link found to the bottom left of the main Members window.



3. You are now looking at all of your existing membership fields, which you can edit. Each field is associated to a field type as well, and you are free to use these different field types for each of your membership fields, depending on how you would like your membership form to display and function.

IsActive	Rank	Field Name
True	1	Edit Your Member Details
True	5	TransactionID
True	10	First Name
True	20	Last Name
True	23	Email
True	60	Address
True	70	City
True	75	Country
True	80	Province/State
True	90	Postal
True	110	Work Phone
True	120	Home Phone
True	130	Mobile Phone

Field ID	Field Name
1	Member_Firstname

Field ID: 1
 Response Key: Member_Firstname
 Display Name: First Name
 Rank: 10
 Field Type: Textinput
 Mandatory:
 Default Value:
 Hint Text:
 Member Editable:
 Active:
 Private:
 SAVE CHANGES | CANCEL | DELETE

The Fields on the left are editable by clicking on their Field Name. The right hand window displays the field's properties you can edit.

To add a New Field, click the Add New Field Button

ADD NEW FIELD

Field Properties

Field ID: This ID number is used by SiteCM and is not editable by the administrator.

Response Key: Is a variable used to store the information entered into the field during its use. The response key you enter cannot contain any special characters or spaces.

Display Name: Used to display the Field Label, next to the field itself eg. **Name:**

Rank: Used to determine the order of the member field within the membership form itself.

Field Type: Choose what type of field to display. There are 24 different field types available. For example, if you need an Email field that checks whether the information entered into the field resembles an email address, you would choose 'Email' as the field type to represent this field.

Mandatory: Does the field require a response from the site visitor or administrator before the member form can be submitted or updated?

Default Value: Populates the field with a predefined value of your choice entered into this field.

Hint Text: Provides the end user a hint of what information is required for this field, in the form of text.

Member Editable: Place a check into this field so that the field displays on the front end of the website within a Member Edit scenario.

Active: Sets the field to be Active, or Inactive depending on your selection.

Private: Is not in use at this time. Its intended functionality in a future build of SiteCM is to set whether the field only displays within the SiteCM manager and on the front end of the website in a Member Edit scenario, or not.

Save Changes: Use this button to save any changes made to the membership field properties.

Cancel: Cancels any changes made to the membership field you are editing.

Delete: Deletes the membership field from the membership form. If you do not want to delete the field, but would rather the field not display within the membership form at this time, you can use the Active checkbox instead to disable the field for use.

Other Additional properties:

Sometimes you may want to offer a field type that lists a dropdown of choices, or displays options in the form of Checkboxes or Radio buttons. Choosing this type of field then displays an additional property called Possible Values, which is used to create that list of choices for your site visitor to choose from.

FIELD	
Field ID	122
Response Key	Member_favoritecolor
Display Name	Favorite Color
Rank	120
Field Type	SingleSelectionBox
Mandatory	<input type="checkbox"/>
Default Value	
Possible Values	Red,Green,Blue,Violet,Sky Blue,Black,White
Member Editable	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Private	<input type="checkbox"/>
<input type="button" value="SAVE CHANGES"/> <input type="button" value="CANCEL"/> <input type="button" value="DELETE"/>	

In the example above we are using the Field Type:

SingleSelectionBox. This field displays a Drop Down menu of possible answers the site visitor uses to select their appropriate answer. The list of answers is determined by you, the Administrator of the website.

The choices you would like to offer the site visitor are then entered into the Possible Values field, as a comma separated list.

The comma separated list of choices should resemble the following list below. For example, if you were asking a site visitor what their favorite color was, the list of Possible Values could be:

Red,Green,Blue,Violet,Sky Blue,Black,White. **

**** Notice that there are no spaces before or after the comma, separating each list choice.**

Once you have completed customizing your fields, click the **< Back to Membership** link found to the bottom left of the Fields window, and continue to enter your members information. Your member will also see the same fields as you have created as well, on the front end of the website.

True	80	Province/State
True	90	Postal
True	110	Work Phone
True	120	Home Phone
True	130	Mobile Phone

< Back to Membership
ADD NEW FIELD

If you have any questions on further managing your membership area or membership fields, please contact support at ideaLEVER solutions. We will be happy to assist you.