



## **Member Assembler “Get Started” Guide**

*Last Updated 1/2011*

Small Farm Central’s Member Assembler is a service for CSAs and other farm membership programs that integrates online sign-up tools with member management, balance tracking, and more. It saves time, mailing costs, increases accuracy, and makes sign up more convenient for members. This document will explain how to set up the Member Assembler to model your CSA or membership program.

## Setting Up Your Member Assembler

To set up your Member Assembler, there are 4 key steps:

1. **Member Types.** Create “member types” that represent the types of memberships available (like Vegetable Shares or Spring Shares).
2. **Pickups.** Create pickup locations. Your members will need to choose where to pick up their share -- you can use these locations later to send emails and more.
3. **Forms.** Set up “custom forms” to collect information like favorite vegetables, volunteer interest, or any other questions you can dream up.
4. **Checkout.** Create payment options for your members. Once your members have selected all of their options, they will need to checkout in some way. This may be sending them on to PayPal or just sending a check. Either way, there are a number of options from customizable emails to downpayments and more!

Once these four steps are completed, the Member Assembler is ready to accept memberships via the web. The initial set up and getting comfortable with the system should not take more than a few hours, though there are lots of options to tweak as you go along, so it depends on your needs as to how long the set up will take.

The next pages describe these steps in detail with screenshots and tips.

## Login to the Control Panel

Before we can move on to setting up your Member Assembler sign-up process, you must first access the control panel. The control panel allows you to customize the sign-up process and access data. It is the administrator area of your site; your customers do not see this part of the system.

Access the control panel at: <http://sfc.smallfarmcentral.com>

Use the login and username we provided to login; after login you will see all the tools available to you.

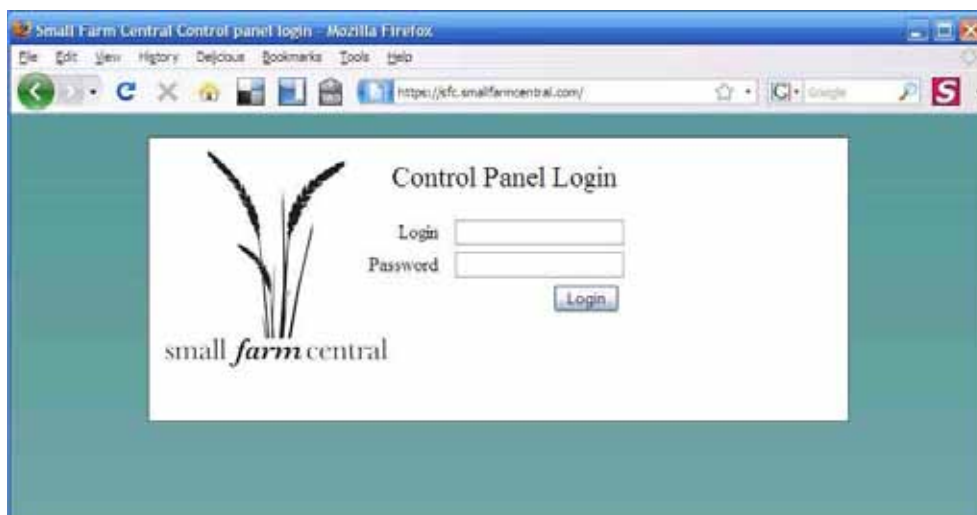


Figure 1. The control panel login screen.

# 1. Creating New Membership (Share) Types

A “member type” represents the options that a member has to buy into your membership program or CSA. This could include, but is not limited to: Egg Share, Vegetable Share, Pork Share, Bread Share, or Spring Share. A type is also a group of options with distinct prices associated with each option. For example, if you had a Vegetable CSA Share in three different sizes, you might create a type labeled ‘Vegetable CSA Share’ and then create 3 options under that type: Small, Medium, and Family Sized.

Once created, your members might see share options that look a bit like this:



Figure 2. Typical first screen that interested CSA members will see.

To create your first Member Type, navigate to the Member Type Manager in the Control Panel: **Member Assembler / Configure / Member Types**

Click on “**Create New Type**” with the yellow background about a 1/3 of the way down the page. This will take you to a form which you can use to create your first member type.

Each option on the “Create New Type” page is explained in detail on the following page.



Figure 3. The Membership (Share) Types page, where all your membership types are listed.

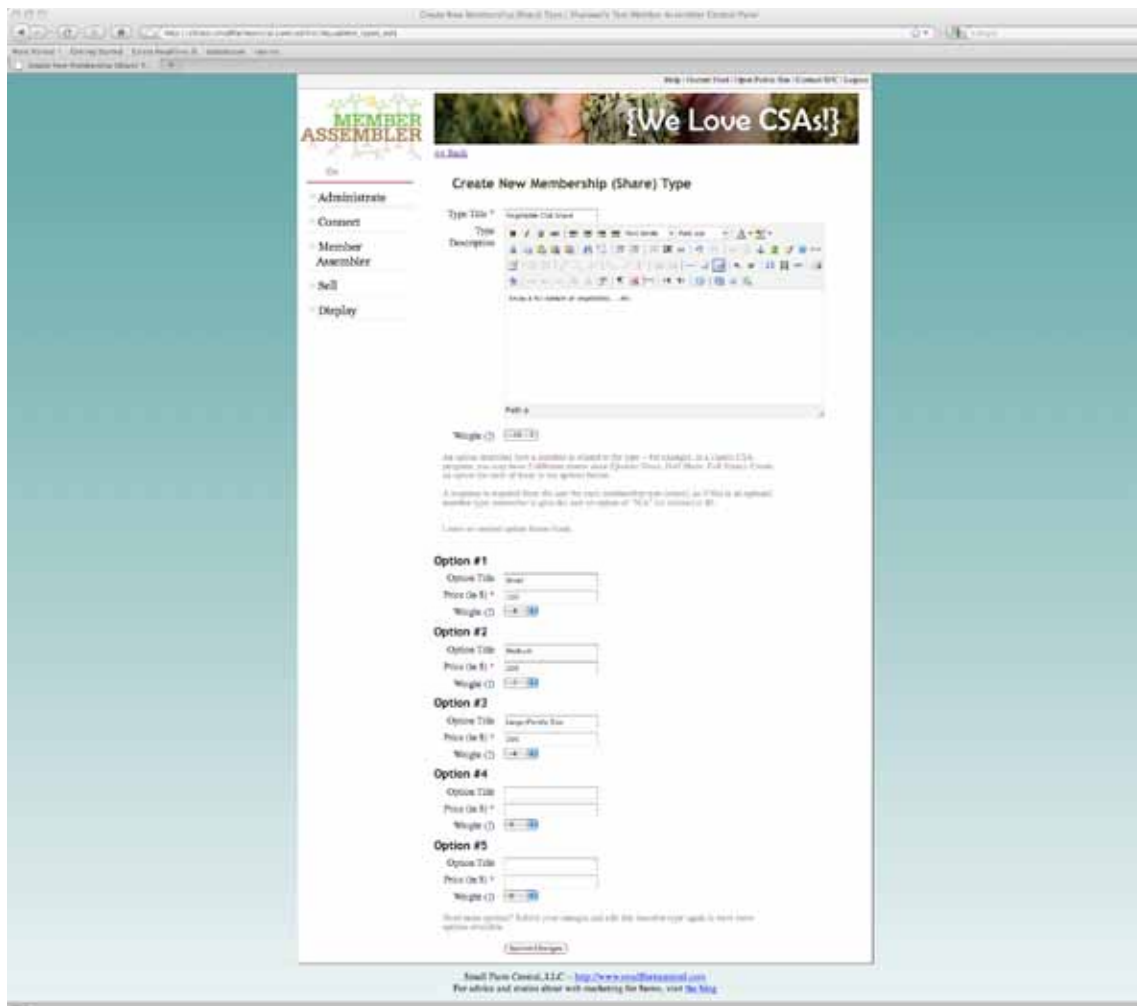


Figure 4. The “Create New Membership Type” page, where detailed information is gathered for each membership type.

### Type Title

This is the title of the Member Type you are creating – take a look at “Figure 4” above. Vegetable CSA Share is an example of a type title in the sample configuration. Put whatever words you use to describe this part of your membership program here.

### Type Description

The description field allows you to expand on the Member Type, describe details, and convince the member that it is something they want to buy. You will see the editor toolbar is a stripped down version of Microsoft Word. You can use this toolbar for rich text editing, like changing fonts, adding photos, and links.

### Weight

The weight setting defines the order that the Member Types show up in. Please see the discussion of weights in the section on Custom Forms for more detail.

### Options #1-5

The options allow you to create different membership levels within a Member Type and assign a distinct price to each option. For example, in Figure 4, the options for the first share type (Vegetable CSA Share) are Small, Medium and Large/Family Size.

If you want the user to be able to opt out of a Member Type, it is important to have one option that is priced at zero dollars such as “No vegetable share”. This is because a response is required for each member type and the system will not let the user move on until he or she has made a response to each. If there are more than 5 options in your Member Type, just submit the changes after you have completed the 5th option, go back to the Member Type Manager, and then edit the Member Type you just created. There will be another five fresh boxes to put more Member Types into.

## Tips!

If a Member Type fills up or is otherwise unavailable, just click the disable button beside the Member Type in question in the Member Type Manager (**Member Assembler / Configure / Member Types**). Disabling the type will keep the entered data in your system, but will hide the type from new sign-ups.



Figure 5. It's easy to disable a membership type, by clicking the "disable" button on the Membership Type page.

## 2. Creating Pickup Locations

Pickup locations identify where your customers get their food during the season. Even if there is no choice because there is only one pickup location, please create it using the steps below.

1. Create each pickup location. In the control panel navigate to:  
**Member Assembler / Configure / Pickups** and type the pickup title in the form labeled **“Create New Pickup.”**

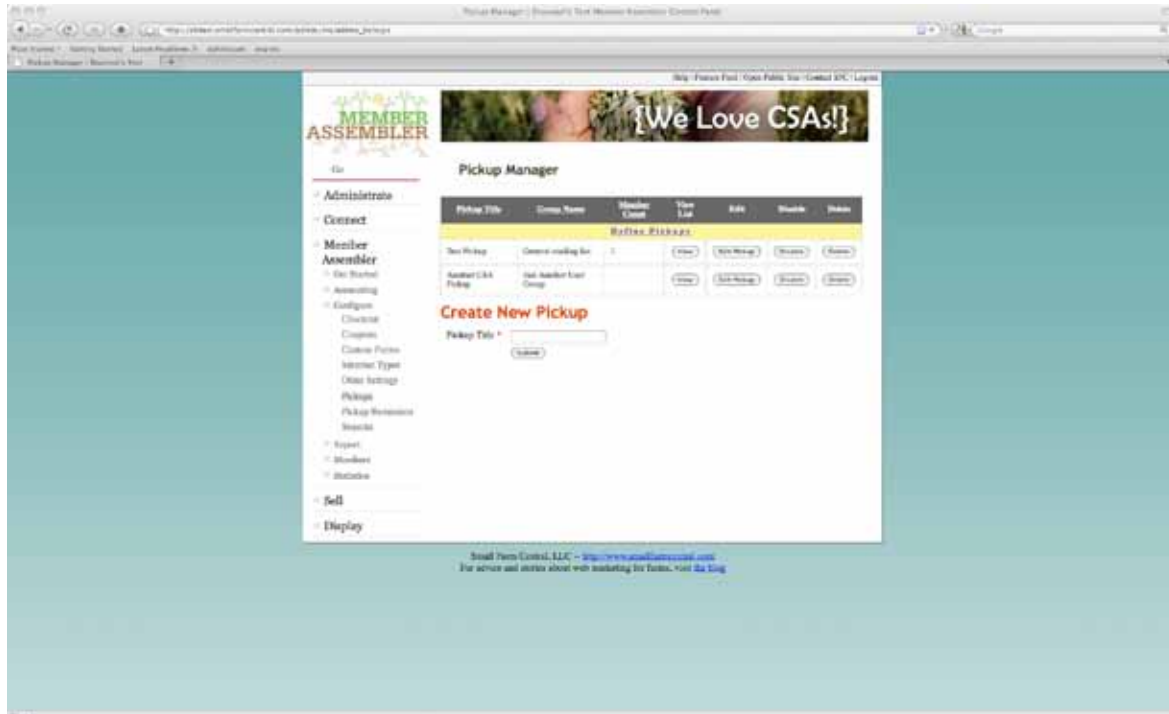


Figure 6. Creating numerous pick up locations is easy with the Pickup Manager.

2. After the pickup is created, you will be taken to the **“pickup detail”** page (see Figure 7.) Here you can add extra information about each pickup location such as day, time, and description. Put as much information into this area as your customers need to make a decision about their pickup. The “pickup description” text area is flexible and includes the rich-text editor, so you can add as much extra information as needed.



Figure 7. Add details to your pickup location.

3. Now your pickups are created and available to new members on your Member Assembler sign up page.

## Tips!

- If a pickup location fills up before the others, just click “Disable” for that location in the pickup manager and the row will turn red. This signifies that it is not available for new sign-ups.
- When the season starts, you can come back to the pickup manager screen and click on “View” to get a printable list of members in each pickup. This is useful as a pickup list to see who has come and who has not.
- Send emails to the contacts at each pickup location by navigating to: **Connect / Mailing List / Send Mail** Compose your email as normal; at the bottom of the “Send Mail” page you can check the user groups that the email will go to (including the pickup locations we just created).
- If you already have a Small Farm Central site, and want to associate groups with pickup locations, when you are creating your pickup locations, click “Define Pickups” in the yellow box on the Pickup Location Manager page: **Member Assembler / Configure / Pickups**

### 3. Creating Forms

Custom forms allow you to collect any information that does not fit into the other options we have provided. With custom forms, you may want to collect:

- Preferred product/vegetable information so you can grow what your customers want.
- Email addresses of the customer's friends that may be interested in the CSA.
- Volunteerism interest
- An open "comments" box that the customer can use to write any special notes.
- Or anything else your imagination can dream up.

To create form items, navigate to:

**Member Assembler / Configure / Custom Forms**

Click on **"Create New Form Item"** in the yellow background to create your first form item.



Figure 8. Create Custom Forms to gather important information about your customers.

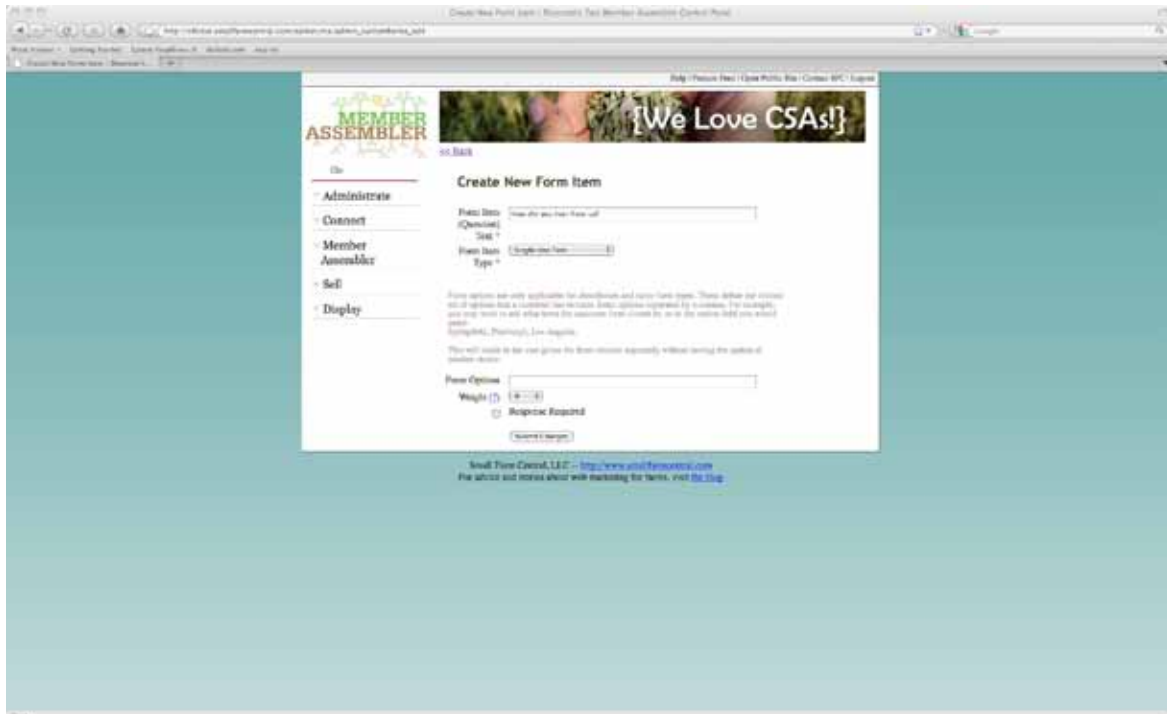


Figure 9. Within the Create New Form Item page, you can automatically create 5 different form item types.

### Form Item Text

Type the question or statement that you want to get a response to in the “Form Item (Question) Text” box, such as: *“Please check your preferred vegetables so we can grow to your preferences.”*

### Form Item Type

The next option, Form Item Type, determines the options the user will be given to respond to your query. There are five options:

#### 1. Single-line Text

Single-line text gives the user an open text box to enter anything they like in response to your question text. This is good for open-ended queries. The result looks like this in the public Member Assembler pages:

How did you hear about our CSA? \*

Figure 9a. An example of a Single-line Text question.

#### 2. Multi-line Text

Multi-line text is much the same as single-line text, except the user is given a larger text box which suggests that a longer answer is expected or allowed.

Do you have any other questions or comments? \*

Figure 9b. An example of a Multi-line Text question.

### 3. Radio

The radio option gives the user a pre-defined set of responses, but only one choice can be selected at a time. Use the “form options” text field as described below to set what responses are expected. A radio response looks like this:



What is the best way to contact you?

- mail
- phone
- email
- conch shell

Figure 9c. An example of a form question using the Radio option.

### 4. Checkboxes

Checkboxes are like “Radio”, but the user can enter multiple responses for one question. The result will look like the screenshot below. You will use the “Form Options” text field as described below to describe the options the user has to enter.



What products are you interested in?

- cheese
- eggplant
- milk
- sweet corn

Figure 9d. An example of a form question using the Checkboxes option.

### 5. Yes/No

Yes/No gives the user a set of radio buttons (as described above), but there only two options: Yes or No. The result looks like this:



Are you interested in working with us once a week for a membership discount?

- Yes
- No

Figure 9e. An example of the Yes/No form question.

## Form Options

The next part of the form asks for “Form Options.” This only applies to responses of the Checkbox or Radio type; if you are selecting one of the other types, just leave the form option field blank.

If you are selecting the Checkbox or Radio type, then the “Form Options” text box allows you to specify the options that the user will have in responding to your query. Each option should be entered with a comma to delineate the response options. So for example, to create the checkbox response shown in Figure 9d above, you would type into the “Form Options” textbox: cheese, eggplant, milk, sweet corn

## Weight

You will see the “weight” option throughout the control panel because it helps you explicitly order items in a list. If you have not played with this option before, a more thorough explanation can be found in the help document on weight: <http://www.smallfarmcentral.com/help/weight>

Basically, the heaviest items sink and the lightest items float. So, if you wanted a form item to show up at the top of the list, you would set a weight of -10. If you wanted a form item to show up at the bottom of the list, you would select a weight of 10.

If the concept of “weight” seems a little fuzzy just reading this description, play with this setting to see it in action. That usually clears up any fuzziness. It is a concept to get used to because you will find it through the Member Assembler and control panel.

## Required

If you want to force the user to respond to a particular form item, just check the “Required” checkbox as you are creating the item. If the user does not respond to the query, an error message will be shown and will not allow the user to proceed until a response has been entered. Repeat the steps above to create all of your form items.

## Tips!

- If the usefulness of a form item passes and you do not want users to answer it anymore, just click the disable button beside the form item in question in the Custom Form Manager (**Member Assembler / Configure / Custom Forms**). Disabling the item will keep the entered data in your system, but will hide the item from new sign-ups.
- Once you have a lot of data in your custom forms, you may want to manipulate it in an outside program. You can download an Excel spreadsheet of the custom forms responses by navigating to: **Member Assembler / Export**

## 4. Configuring Checkout

Once your members have selected all of their options, they will need to checkout in some way. This may be sending them on to PayPal or just sending a check. Either way, there are a number of options from customizable emails to downpayments and more!

- **Invoice Only** in which no money changes hands online. A customizable email is sent to the user and you will handle the payments through whatever means you currently handle it, such as check or money order.
- **Credit Card Only (PayPal)** hooks up to PayPal's credit card processing system. Your customers do not need to have a PayPal account to pay with this method.
- **User Choice** of one of the above options. This may be applicable if you want to give members wary of paying by credit card a way to pay by check.
- **Automated Scheduled Payments (ASP):** Want to offer a payment plan to your subscribers? but don't want to deal with all the paperwork and chasing around members for payment? The ASP option may be right for you -- through Authorize.net, the customer's credit card information is stored securely and then automatically charged on future dates that the customer agrees to. Due to the costs of an Authorize.net account, farms must be doing \$50,000+ in transactions per year for this option to make sense. For more information on this service, visit our blog post about making sense of Automated Scheduled Payments here:  
<http://smallfarmcentral.com/blog/oct/2010/adding-membership-update-feature-your-site>

Choose your checkout option in the Checkout Manager. Navigate in the control panel to:  
**Member Assembler / Configure / Checkout**



Figure 10. The Checkout Settings page will help you create an easy checkout system for you and your customers.

It is very important that, if you make the choice of PayPal, you need to create an account with PayPal and integrate it into the control panel. This is covered in depth in this help document:

<http://smallfarmcentral.com/help/paypal-integration>

### **Down Payment Terms**

On the checkout screen, a total is shown to the new member based on the options they selected on the “Member Types” screen. The checkout screen includes a programmable down payment output – if you are using PayPal, this is the payment amount the “Pay Down Payment” option is pre-programmed with.

There are three down payment options:

- No Down Payment. Full fee due at checkout.
- Variable Amount or Percentage Down Payment (25%, for example)
- Constant Amount Down Payment (\$250, for example)

Choose the option that makes sense for your membership program. If you choose percentage or constant amount, enter the amount in the text boxes below the down payment type selection. Remember to use numbers only – no dollar or percentage signs, so 10 = 10% and 250 = \$250.00.

### **Accept Full Payment**

It is often desirable for the farm and the customer to accept full payment for the membership program at the time of sign-up. With the “Accept Full Payment” options, you can give your users the choice of either paying the down payment you set above, or taking the full amount.

This option only applies to farmers choosing to use PayPal. If you are using the “Invoice Only” option and want your members to have the option of paying in full, explain this in the customized checkout email which we will cover below.

To accept full payment, keep the checkbox marked “Check this checkbox to accept full payment.” checked. It may be desirable to give the member a discount if they pay in full at the time of sign up, so in the textbox marked “Full Payment Discount Percentage” you may put a discount. For example, by putting a 5 in the textbox, the user will get a 5% discount on his or her membership. If you do not want to give a discount, but still want to accept full payment, put a 0 in the textbox to represent no discount.

### **Customize Checkout Email**

The checkout email is sent to each user that completes your signup process. It can be customized to include any necessary text – if you are using the “Invoice Only” checkout option, you should include information of how and when the member should remit payment. This email will be sent to the new member whether they checkout via PayPal or Invoice Only. Put any text you need into the textbox, but remember to leave this text within some part of the email:

%%member-assembler-checkout-details%%

When the message is sent, that coded text will be replaced with the specific invoice details of the order the user placed.

## 5. Coupons

Coupons are not necessary to start your member assembler sign up process, but you will likely find them useful at some point in the future. They allow you to give different prices to different groups of members. For example, you may form a partnership with a local business that gives their employees a 5% discount in your farm membership program.

With the “coupons” settings, you can create a code such as “PARTNERBUS2009” which will give anyone who knows that code and types it in at checkout a discount of a certain percentage or set amount. You may want to use coupons to discount memberships that are sold after the season starts (in other words, partial season shares) because those users will usually get a discount based on the weeks they have already missed.



Figures 10 & 11. Here are two examples showing the Percentage Discount option and the Static Amount Discount option.

## 6. Edit Page Titles and Descriptions

The default page titles and descriptions may not describe your membership program or use the right language, so we give you an easy way to change the titles and put as much text as you need on each public sign-up page.

Navigate in the control panel to:

**Member Assembler / Configure / Other Settings**

You will see a text box for each page title and a text editor for each page description.



Figure 12. The Other Settings page allows you to alter your Page Titles & Page Descriptions.

## **Additional Features:**

### **Creating New Member Assembler Seasons**

As you finish your initial “season” with the Member Assembler, you will need the ability to demarcate a new sign-up process and get your returning customers to sign up again. With the Member Assembler, you will do this with the concept of “Seasons”.

A new “season” might be a switch from your regular season share to a winter share or simply when you move from the 2009 season to the 2010 sign-up period.

To create a new season

1. Login to your control panel and navigate to: **Member Assembler / Configure / Seasons**
2. Create a new season with a descriptive name.
3. Set this new season as the “current season”.
4. This action will reset your member types, pickups, and custom forms from the public perspective, so go in and recreate all of these items to reflect your new season.
5. If you disabled your sign-up process at the end of the last sign up process, make sure you enable it again: **Member Assembler / Configure / Other Settings**

Now your season is ready for your customers! Make sure you test the complete process to be sure it works in the way that you expect.

### **Where do Returning Members Go?**

Returning members will need to visit this page:

**<http://www.yourfarm.com/members/returning>** (replace www.yourfarm.com with your address)

Returning members will type in their email address that they used for the past season and an email will be sent to their address with a secure link that they can use to complete sign-up. This will verify that the user owns the email address.

### **Editing Older Seasons**

After you have created your new season, you may want to go back to make changes to old an old season, view pickup lists, and etc. To keep your public sign-up process humming along on the new season, but to view old season information:

- Navigate to: **Member Assembler / Configure / Seasons**
- Click “**set as admin season**” beside the season you want to view in the control panel.
- Navigate back to the “Seasons” screen when you are ready to view the current season again.

## 6. Get Going!

Now that your Member Assembler set-up is complete, it is time to test the system to make sure everything is functioning as you expect. Go through the sign-up process as a member.

The sign-up process starts at:

**<http://www.yourfarmwebsite.com/members>**

Just replace yourfarmwebsite.com with the web address we supplied in your trial (or if you have an existing Small Farm Central site, replace it with your existing web address).

## Problems? Questions?

There are many ways to get in touch with us if you need some help:

- Control Panel: “**Contact SFC**” link in the top right hand corner of each Control Panel page.
- Website: **<http://www.smallfarmcentral.com/contact>**
- Website Help: **<http://www.smallfarmcentral.com/memberassembler/help>**
- Email: **[support@smallfarmcentral.com](mailto:support@smallfarmcentral.com)**
- Phone: **412-567-3864**