

Nanacast.com Membership Wizard

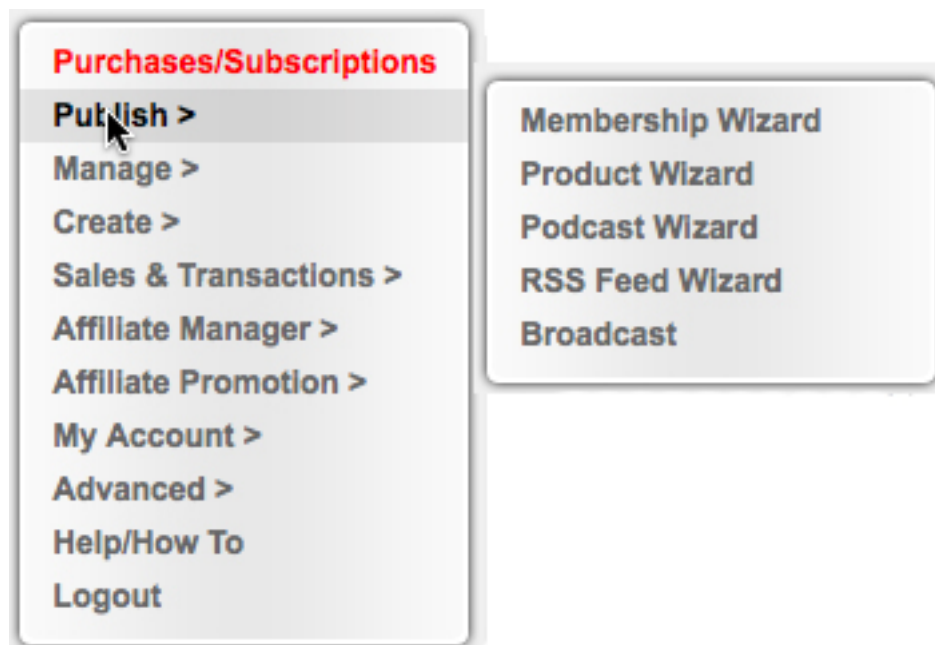
and offer setup Manual

Though not required we recommend setting up just about every offer in Nanacast using the Membership Wizard. To find out why and what the benefits are please watch the video on how to use the membership wizard: <http://nanacast.com/docs/howto>

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Membership Wizard Walkthrough


The membership wizard is a step-by-step approach to publishing your membership site.



To access the Membership Wizard, login to your Nanacast.com account and select Publish --> Membership Wizard from the main menu on the left hand side. (As shown above).

Any information you have entered can be changed after you finished with the Publishing Wizard by accessing the menu Manage --> Memberships. And under each Membership there are editing Options which will allow you to change any settings or text you have entered during the wizard process.

Membership Overview

 [Import Membership](#)[Membership Links](#)[Advanced Client Search](#) 

Demo Membership

Options: [Overview](#)  | [Edit Listing](#) | [Edit Pricing/Delivery](#) | [Upsells](#) | [Email Sync](#) | [Create Button](#) | [Copy](#)  | [Mirror](#)  | [Broadcasts](#) | [New Broadcast](#) | [Notifications/Custom Fields](#)

Status: **Active**

Members: 0 [View](#) | [New](#) | [Import](#)

Total Episodes: 1 [New Episode](#) | [New Chapter](#) | [Episode Order](#)

Episodes & Downloads Link List:

- **No Chapter Assigned:**
- [Edit](#) [Delete](#) [Copy](#) Day 0: Membership


Membership Wizard Step 1

The first step is to prepare all your information & digital goods before entering it into the wizard. Nanacast.com will timeout after 24 minutes of inactivity and automatically logs you out. You would then lose any information you entered during the publishing wizard if it was incomplete.

Add New Membership Wizard

Membership Name:

Mirror Digital Content: (Only the digital content is mirrored, NOT physical products.)



Note: If you need to set up physical-product episodes while also utilizing mirroring, you must mirror episodes on an individual basis. (This way you can mirror digital episodes and also add physical-product episodes as needed.)

Publisher Name:

Customer Service Email:



Customer Service URL:

Customer Service Phone:

Status: 

Add Podcast Functionality or Download Files to Membership: ☐ 

1. Membership Name Field

Here's where you name your membership site. This name will appear when your customers go to purchase and view the content, so make it "official." It can be edited later though.

2 . Mirror Digital Content field

To mirror an episode means to copy exactly and any changes that are made to the original are made to the mirrored version as well. Episodes can be mirrored from within its own membership, from another membership, or from broadcasts (one-time emails to all subscribers). Most likely, you won't need to use this, so leave it as the default "Content Is Unique". When creating your first membership page, this feature won't apply.

3. Customer Service Information

This is how your customers will identify and contact you for questions, comments, refund requests and the like.

Your customers will see this information on:

- the Sales and Checkout page in the Terms & Conditions section
- In the Sales page Publisher Contact info section

Publisher Name field

Either your business name or your name.

Customer Service Email field

You may want to create a separate email address just for this membership site. Then you can filter these emails in your inbox.

Customer Service URL field

This would be a link to your site on your website, if you have one.

Customer Service Phone field

This should be your business phone if you have one, not your personal phone.

Status

You can change the status of the membership to 'Pause' to pause sign ups and the release of new content.

4. Add Podcast Functionality

When checked Add Podcast Functionality or Download Files to Membership will allow your customers to be able to download audio, video, or eBook files, checking this box will enable you to create episodes in which you can place these files for download, such as to iTunes or a computer.

Public Listing: ☒ List in the Public directory.

Private Listing: ☐ Do not list in Public directory. (You may still access it directly.)

Share This: ☐ Show 'Share This' link in main directory

Alias: ?

6 characters minimum, and 250 characters maximum.

Only letters, numbers and dashes (-) are allowed.

Example: the alias "my-podcast" could be accessed by going to <http://synergycart.com/my-podcast>

Also, you can access the membership login screen for the alias "my-membership" by going to <http://synergycart.com/my-membership/login>

SynergyCart.com Category :

This is the category where your product will be displayed in our main directory and/or affiliate directory (depending on your settings).

5. Directory Listing

Public Listing: If selected, your membership will be listed in the Nanacast.com directory and you will get the benefits of more leads from people browsing the directory and through Google searches. This selection will also add a Nanacast.com logo banner at the top of your Sales page.

Private Listing: Your membership won't be listed in the directory and it won't have the Nanacast.com banner at the top of the sales page.

Share This: This selection turns on the social bookmarking links at the bottom of the sales page, which can encourage the viewers of this page to share it with others. This option only appears if it's a public listing. Click the square checkbox to enable it.

6. URL Alias

You can select a user friendly URL ending here, such as <http://www.Nanacast.com/membershipname> instead of numbers at the end, such as <http://www.Nanacast.com/vp/45342/12306/>

7. Directory Category

Select which public directory category you want your membership to appear in. Take a look at the selections, then pick the most accurate one.

Title Bar: ?

URL to Image: ?

SynergyCart.com-Hosted Sales Page: (If you would like to get an order link, buy now button, or form to place on your own website sales page you will have the option to do this when you finish this wizard.)

Paste in HTML or [Click Here to Use HTML Editor](#)

[Show Preview In New Window](#)

Head Tag HTML Code: (Use only if you have code that needs to be placed between <head> </head> tags.)

8. Title Bar

This wording will be used as your page title tag and will appear at the top of the browser in the Sales page. It could include the product name and additional relevant words and keywords. There is no character limit.

9. URL to Image

If you would like a header graphic to appear at the top of your sales, order, and thank you pages, insert a link to that image here. It needs to be hosted on your server, and it cannot be uploaded from your computer directly to Nanacast. Simply copy and paste the link into the box as shown below.

10. Hosted Sales Page

This is where you paste in your Sales page body HTML.

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box. If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

With the HTML editor, it can also help you embed Images, Flash for audio and video, and Active links into the HTML.

11. Head Tag HTML Code

If you need to add code between the head tags on the Sales page this is where you insert your code (example:

link to external CSS file, Javascript, etc).

Customized Membership Settings

Note: When your clients use your Customized Membership Login URL, they will only see this membership when they login and none of the other products/memberships they may have purchased from you or from others.

Note: You must enter an alias for your membership in order to have a customized login page or a CNAME. You can enter the alias above.

CNAME Domain:

CNAME Domain in Text format:



Your visitors can access your membership on your own domain or subdomain by creating a CNAME record for your domain name or subdomain name and pointing it to synergycart.com. Do not type http://, and just type your domain or subdomain name in it's simplest form.

Setting Up A CNAME in GoDaddy.com:

In this example we want our domain name called "example.com" (and "www.example.com") to point to synergycart.com. Login to your go daddy account. Make sure your domain is set to use go daddy DNS. If this is the case you should see a link for Total DNS Control. Click that link and create two cname records:

Enter alias name: www

Points to host name: @

(this cname is probably already in there)

Enter alias name: example.com

Points to host name: synergycart.com

12. Customized Membership Settings (Optional)

When your clients use your Customized Membership Login URL, they will only see this membership when they login and none of the other products/memberships they may have purchased from you or from others.

CNAME Domain (only available for Nanacast.com Premium Accounts)

Use this field to mask the Nanacast.com domain in the URL bar by changing it to your own URL. You first need to set this up on your server. Basic instructions can be found within the Nanacast wizard; full instructions should be available on your server host's website.

URL to Header Graphic: <input type="text"/> (850px wide) ?
Membership Background Color: Color: <input type="color"/> <input type="text"/>
Customized HTML to appear at the top of each content page within membership area: Paste in HTML or Click Here to Use HTML Editor <div style="border: 1px solid black; height: 80px; width: 100%;"></div>

13. URL to Header Graphic

Enter the URL to your header image. This image will should be 850px wide. This image will be used as the header graphic for your membership login and membership pages.

Membership Background Color

Use this box to make your color theme in the membership area consistent with the rest of your pages. Either click on the small white rectangle to select a standard color, or enter in the hex code for a custom color in the longer box to the right.

14. Customized HTML to appear at the top of each content page within membership area

Anything you put in this box will appear above the header image. You do not need to put anything in here.

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

<p>Customized HTML to appear ABOVE login boxes on login form: ?</p> <p>Paste in HTML or Click Here to Use HTML Editor</p> <div style="border: 1px solid black; height: 80px; margin: 5px 0;"></div> <p>Login Form Head Tag HTML Code: (Use only if you have code that needs to be placed between <head></head> tags.)</p> <div style="border: 1px solid black; height: 40px; margin: 5px 0;"></div>

15. Customized HTML to appear ABOVE login boxes on login form

This is the custom body HTML that will appear above the login boxes on your customized membership page. You must enter an alias for your membership in order to have a customized login page by using the alias box mentioned above.

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

16. Log-in Form Head Tag HTML Code

If you need to use a script or Cascading Style Sheet (CSS) between the head tags of a page you would enter it here. This is optional.

If you have our regular Nanacast.com account please skip to #24 to continue with the membership wizard.

Nanacast.com Premium Account Membership Features

The following features (#17 to #23) are only available with the Nanacast.com Premium accounts.

<p>Customized HTML to appear BELOW login boxes on login form: ?</p> <p>Paste in HTML or Click Here to Use HTML Editor</p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>
<p>Hide Link to login to full SynergyCart.com account on login page: <input type="checkbox"/> ?</p>
<p>Customized HTML to appear at the top of the Purchases/Subscriptions Overview page within membership area:</p> <p>Paste in HTML or Click Here to Use HTML Editor</p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>

17. Customized HTML to appear BELOW login boxes on login form

This is the custom body HTML that will appear below the login boxes on your customized membership page. You must enter an alias for your membership in order to have a customized login page by using the alias box mentioned above.

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

18. Hide Link to login to full Nanacast.com account on login page

We recommend you leave this box unchecked.

This link is important because especially if you or one of your members actually needs to login to their full Nanacast.com account after they have clicked on your personalized membership login, there is no way to do so without closing the browser completely (which essentially restarts the session). So this link is there just as a convenience in case someone goes to your personalized membership login and keeps clicking things and can't figure out how to get to the main Nanacast.com site login. This link takes them to the main site login without having to close and re-open their browser. This checkbox setting applies to this custom membership login page.

19. Customized HTML to appear at the top of the Purchases/Subscriptions Overview page within membership area

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the “Click Here to Use HTML Editor” link to open up the WYSIWYG editor (What You See Is What You Get).

<p>Customized HTML to appear at the bottom of the Purchases/Subscriptions Overview page within membership area: Paste in HTML or Click Here to Use HTML Editor</p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div> <p>Overview Page Head Tag HTML Code: (Use only if you have code that needs to be placed between <head></head> tags.)</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p>Hide the outer fieldset box on the Purchases/Subscriptions Overview page: <input type="checkbox"/> </p>
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20. Customized HTML to appear at the bottom of the Purchases/Subscriptions Overview page within membership area

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the “Click Here to Use HTML Editor” link to open up the WYSIWYG editor (What You See Is What You Get).

21. Overview Page Head Tag HTML Code

This refers to the purchases/subscriptions page that your customers will see when they first log in. The head tag box is here for those of you who need to use the occasional script or Cascading Style Sheet (CSS) in the head of a page. This is not required though. You can also make text or graphics appear at the top of the page as shown below.

22. Hide the outer fieldset box on the Purchases/Subscriptions

Overview page

This setting when ticked off will hide the outer fieldset box border.

<p>Customized HTML to appear at the top of the Episodes/Downloads Listing page within membership area: Paste in HTML or Click Here to Use HTML Editor</p> <div></div> <p>Customized HTML to appear at the bottom of the Episodes/Downloads Listing page within membership area: Paste in HTML or Click Here to Use HTML Editor</p> <div></div> <p>Episodes Listing Page Head Tag HTML Code: (Use only if you have code that needs to be placed between <head> </head> tags.)</p> <div></div>

Episodes Customization

For the next three steps that refers to episodes, the customer view of episodes is found in the Purchases/Subscriptions area then click on "Access the Content" as shown below:

21. Customized HTML to appear at the top of the Episodes/Downloads Listing page within membership area

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

22. Customized HTML to appear at the bottom of the Episodes/Downloads Listing page within membership area

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

23. Episodes Listing Page Head Tag HTML Code

You may use this for scripts, CSS, graphics or text.

Show "Catalog" Link in Top Menu Bar for Your Other Products: ☐ ?

Hide This Membership From "Purchases/Subscriptions" List: ☐

Use General-Purpose Login Link on Thank-you page and Emails: ☐ ?

Show item in your personal catalog: ☐ ?

Continue To Next Step >>

24. Show "Catalog" Link in Top Menu Bar for Your Other Products

This option will show a Catalog link in the top menu bar when your customers are logged into your membership. The catalog will show other products or memberships that you offer.

Hide This Membership From "Purchases/Subscriptions" List

Leave this unchecked. The only time you may need to use it would be if this membership were no longer active and you don't want to delete it from your account.

Use General-Purpose Login Link on Thank-you page and Emails

This option will use your general-purpose login link instead of the custom membership login link whenever the system shows the link to login to your subscribers, such as on the Thank-you page and in emails. If you have your subscribers login to your general-purpose login, they will see other products they've purchased from you in their Purchases/Subscriptions list.

Show item in your personal catalog

This option will show this membership in your personal catalog visible to your subscribers when they login. You will also need to select a topic category that this membership should be categorized under.

Continue to Next Step

Click the button that reads "Continue to Next Step" to save this listing and go to page 2 of the wizard.

Continue To Next Step >>

Membership Wizard Step 2

Add Initial Membership Page Wizard

This is the first page your customers will see after subscribing. You may want to welcome your customers and inform them when and how they can access your content.

Mirror Episode: Only the digital content is mirrored, not the physical product (if applicable)
☐ Content Is Unique (Do Not Mirror Other Episode) ?

Show Only To Subscribers Who Use Coupon Code: ?

Title:

Content:
Paste in HTML or [Click Here to Use HTML Editor](#)

[Show Preview In New Window](#)

Possible Variables: {email} {firstname} {lastname} {access_code} ? {itunes_url} ?
{standard_url} ? {rss_url} ? {zune_url} ? {yahoo_url} ? {google_url} ? {aol_url} ?
{msn_url} ? {bloglines_url} ? {episode_file_url} ? {affiliate_link} {affiliate_id}
{show_buttons} ? {file_download_links} ? {bonus_thank_you_page_url} {date}
{join_date}

1. Mirror Episode

To mirror an episode means to copy exactly and any changes that are made to the original are made to the mirrored version as well. Episodes can be mirrored from within its own membership, from another membership, or from broadcasts (one-time emails to all subscribers). Most likely, you won't need to use this, so leave it as the default "Content Is Unique". When creating your first membership page, this feature won't apply.

2. Show Only To Subscribers Who Use Coupon Code

This feature cannot be used while you are on the Add Initial Membership Page Wizard. The membership first needs to be created, then once after you create the coupon, you can assign it to that membership. Then you can go in and edit the initial membership page to add the coupon code.

This feature is particularly helpful for offering bonus episodes to your subscribers based on certain promotions. You can create individualized coupons (by later going to Create > Coupons in the left side menu) and assign the coupons to a specific affiliate. Then add your affiliate's special bonus content as an episode and select that coupon code here. This way only those subscribers who signed up under that affiliate have access to that affiliate's bonus info.

3. Title

Enter the title of the initial page/episode here. This is required field.

4. Content


Enter information and content here. You can insert links to download files and embed video and audio content too. There is no URL to file link on this welcome page so any files in this page can't be podcasted, but in subsequent membership pages/episodes content can be.


Notice all the variables shown beneath the content box that can be used as well. Most of the variables have help tips next to explain them.

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

Use the "Show Preview In New Window" link to check to make sure you like the way your HTML is formatted before saving.


Show This Content Page When Accessed via account login (memberships only): ☒ 

Show Link to this Membership Page in top menu bar (memberships only): ☐ 

Head Tag HTML Code: (Use only if you have code that needs to be placed between <head> </head> tags.)

Show Icon Button: ☒

Selected Icon Button: [Change Image](#)



5. Show This Content Page When Accessed via account login (memberships only)

This option is checked by default to ensure this page appears to your customers, unless you uncheck it, then it will be hidden. Content pages that contain media files will always be included in any Podcast or RSS Feed regardless of this setting.

6. Show Link to this Membership Page in top menu bar (memberships only)

This option will show a link to this content page in the top menu when the subscriber accesses your content pages through their browser when logged into their account. It's unchecked by default.

7. Head Tag HTML Code

The head tag HTML box is here if you need to use a script or Cascading Style Sheet (CSS) in the head tags <head></head> of the initial page. This is not required though.

8. Show Icon Button and Selected Icon Button

An icon graphic will appear next to the title of your page/episode in the content area if you check the Show Icon Button.

Additional icon choices appear if you click on the Change Image link next to Selected Icon Button.



9. Save and Continue, Cancel and Continue, or Add Another Membership Page

The most likely button to click here is the top one, Save and Continue to Next Step. Additional membership pages can be added later once you have completed going through the wizard, by going to Manage > Memberships from the left side menu.

Save confirmation appears at the top of the next page: **Operation Complete**

Membership Wizard Step 3

Edit Pricing and Delivery

This is where you get to set your pricing, delivery options, create a thank-you page, and create the initial email with automatically created login information.

Edit Pricing and Delivery

[Overview](#) | [Edit Listing](#) | [Edit Pricing/Delivery](#) | [Upsells](#) | [Email Sync](#) | [Create Button](#) | [Broadcasts](#)
| [New Broadcast](#) | [Notifications/Custom Fields](#)

Note: The Third-Party Email Autoresponder Settings have moved to a new page. Click "Email Sync" above.

Payment & Thank-You Page Setting:

☒ **Free or One-Time Payment with Thank-you Page**

☐ **Subscription with Thank-you Page**

Pricing Strategy: Use Tiered Pricing Based on Quantity Sold

1. Payment & Thank-You Page Setting

The two options here are between charging your customers one time or recurring times over a set interval of time. If you want to change the option to a subscription payment, click the white circle next to the word subscription.

If you selected "Free or One-Time Payment" above, then the next steps applies. If you selected "Subscription with Thank-you Page", skip ahead to Step 3 that refers to it.

2. Pricing Strategy: Free or One-Time Payment

To see the available one-time pricing options, click anywhere on the bar that says "Use Regular Pricing". Click on the option you want to use. Here's an explanation of each:

1. Free (No Payment Required)
2. Use Regular Pricing (One Price Only)
3. Use Tiered Pricing Based on Quantity Sold
4. Use Tiered Pricing Based on Date Ranges
5. Use Dynamic Pricing Based on Quantity Sold
6. Use Dynamic Pricing Over Time

Step 2a – Pricing Strategy: Free (No Payment Required)

Pricing Strategy:	Free (No Payment Required)	
Current Total:	8	units have been sold to date (increments automatically)

You won't have to enter price or checkout information. The only option you have is the ability to enter the number of units you have sold to date via other channels, so you can keep track of the total and centralize your business within Nanacast. For most cases, this number will be the default 0.

Step 2b – Pricing Strategy: Use Regular Pricing (One Price Only)

Pricing Strategy:	Use Regular Pricing (One Price Only)	
Price:	0.00	(Enter 0.00 if you want this to be Free)
Current Total:	0	units have been sold to date (increments automatically)

1. Price

Enter the price in numbers without a currency symbol. There is an option down the page called PayPal Currency that enables you to select the currency your membership is priced in.

2. Current Total

This refers to the quantity of units that have been sold to date via other channels, so you can keep track of the total and centralize your business within Nanacast. For most cases, this number will be the default 0.

Step 2c - Pricing Strategy: Use Tiered Pricing Based on Quantity Sold

Pricing Strategy:	Use Tiered Pricing Based on Quantity Sold	
Starting Price:	0.00	(Enter 0.00 if you want this to be Free)
Add New Tier		
Increase Price to: <input type="text"/> when <input type="text"/> are sold. Remove Tier		
Current Total:	0	units have been sold to date (increments automatically)
Continue Sale Indefinitely or End Sale:	Continue Sale Indefinitely	

The tiered pricing strategy is intended to induce your customers to buy early and now, because if they delay and other people buy before them, the price goes up based on quantity sold. It also enables you to advertise a lower price, while ultimately generating a higher average price.

\$29 would be your starting price. Then you would enter \$39 in the box to the right of “Increase Price to” and 10 in the box to the right of “when”. Click “Add New Tier” to repeat these steps for the remaining prices and quantities. You could then choose a sale end date from the drop down that reads “Continue Sale Indefinitely”.

Step 2d - Pricing Strategy: Use Tiered Pricing Based on Date Ranges

The screenshot shows a pricing configuration interface. At the top, a dropdown menu is set to "Use Tiered Pricing Based on Date Ranges". Below this, the "Starting Price" is set to "0.00" with a note "(Enter 0.00 if you want this to be Free)". The "Start Sale On" date is configured as August 28, 2009, at 11:35 AM. In the center, there is a section for adding a new tier. It includes a link "Add New Tier", a text input "Increase Price to:" followed by an empty box, and a date/time selector set to September 29, 2009, at 11:00 AM. Below this is a link "Remove Tier". At the bottom, a dropdown menu for "Continue Sale Indefinitely or End Sale:" is set to "Continue Sale Indefinitely".

As time goes by, you can make the price go up.

For example, selling tickets to an event. You could have discounted early bird pricing, regular pricing, and last minute premium pricing. The early bird pricing would be your starting price, then you'd enter the regular price in "Increase Price to" and set the date and time, then click "Add New Tier" to repeat those steps for the last minute premium pricing.

You could then choose a sale end date from the drop down that reads "Continue Sale Indefinitely".

Step 2e - Pricing Strategy: Use Dynamic Pricing Based on Quantity Sold

Pricing Strategy: Use Dynamic Pricing Based on Quantity Sold

Starting Price: 0.00 (Enter 0.00 if you want this to be Free)

Price Increase Per Unit Sold: 0.0000

Maximum Price: 0.00

Current Total: 0 units have been sold to date (increments automatically)

Continue Sale Indefinitely or End Sale: End Sale

End Sale when: 0 units have been sold (Enter 0 to disable)

Redirect Buyer to the Following URL if Sale has not yet started, or has ended:
http://

With this strategy, you choose a starting price, a price increment per unit sold, and a maximum price. You could then choose a sale end date from the drop down that reads “Continue Sale Indefinitely”.

Step 2f - Pricing Strategy: Use Dynamic Pricing Over Time

Pricing Strategy: Use Dynamic Pricing Over Time

Starting Price: 0.00 (Enter 0.00 if you want this to be Free)

Start Sale On: September 21 2009 10 15 AM

Maximum Price: 0.00

Achieve Maximum Price On: September 21 2009 10 15 AM

Continue Sale Indefinitely or End Sale: Continue Sale Indefinitely

With the pricing strategy “Use Dynamic Pricing Over Time”, you would set a starting price and a maximum price, a starting date and an end date. The system will automatically raise the price incrementally evenly over time, reaching the maximum price by the end date.

You could then choose a sale end date from the drop down that reads “Continue Sale Indefinitely”.

3. Subscription with Thank-you Page

Payment & Thank-You Page Setting:


- ☐ Free or One-Time Payment with Thank-you Page
☒ Subscription with Thank-you Page

Trial Period: Days (Set this to 0 to disable.)

Trial Price:

Subscription Interval: Days 

Subscription Price:

Installments:  Set this to 0 for unlimited. Trials don't count towards installments.

For recurring subscription payments, you are given options to set:

1. Trial Period – If you want to set a trial period, how many days do you want the trial period to last? Set it to 0 to disable it.
2. Trial Price – If you have a trial, what price should it be? Free would likely get you more subscribers; setting a small price above free would ensure your subscribers are more qualified and committed about continuing to be your customer.
3. Subscription Interval – How often is the billing cycle in days? If you are using PayPal, the number of days must be 90 days or less due to PayPal's internal restriction. If you want to have a subscription interval longer than 90 days, you can do this by accepting credit cards through Authorize.net or 2Checkout.
4. Subscription Price – What is this membership's ongoing price?
5. Instalments – After how many payments should the subscription end?

4. Display Price to Buyer in "Order Information" box

This will show the price to the buyer in a box labelled "Order Information" at the bottom of the embedded order form.

Note that regardless of this setting, the Order Information box will ALWAYS be displayed on the credit card order page and also if you have activated physical fulfillment (this is because shipping and fees can change based on their country, etc. and buyers need to see exactly what they're being charged.)

Also, the price will never be displayed to buyers when using Text Links.

5. Ordering Methods

Default Ordering Method:

Also offer Credit Card as an option: ☐

Also offer 2Checkout as an option: ☐

PayPal Email:

PayPal Currency:

PayPal Auto Return: [Click Here](#) for instructions on setting up Auto Return in your PayPal account. Enabling "Auto Return" will automatically redirect your visitors to the thank-you page instead of requiring them to click the "Return to Merchant" button once payment has been made. You can leave the "Return URL" field blank in your PayPal account or enter any URL. Each subscriber has a unique thank you page URL that is passed in to PayPal for each transaction so PayPal will use that URL and not the one you've entered in your PayPal account, so it doesn't matter what you've entered there.

The payment system you select as your default will be the primary payment system your customers will use. You can also offer the other two payment systems as alternatives.

Here you have three payment system options:

1. PayPal – PayPal can send money via credit cards, Paypal instant transfer balances, and bank accounts (including checking, savings, echecks).
2. Credit Card – This really means Authorize.net
3. 2Checkout – Another popular option

If only one option is selected, the default, then no order method selection box will show on your sales page.

Secondary Ordering Methods

You can choose to also offer the other two payment methods besides the one you select as the default. You will need to fill in the account information for each if you have not already. This is shown in more detail in the steps below.

Step 5a – Credit Card (Supported merchant account gateways are: Authorize.net, NMI Gateway, ChargebackGuardian, Durango Merchant Services, and any other NMI Gateway white label)

Note: Some features such as one click, forced and optional continuity, and trial offer bundling are only available when you use Credit Card as the only payment option.

If you select the Credit Card option as an ordering method, this refers to Authorize.net as the payment processor. If you have not yet filled in your Authorize.net merchant account information, a warning and link will be presented. Click on the link to add your account information or be linked to Authorize.net to sign up for an account.

- **Click here to enter your merchant account info link:**

To enter your Authorize.net account info or sign up for a new account, click the blue link shown above under the warning. A new window will open up that looks like the following, then follow the instructions. You could also set

this up later by coming back to the "Edit Pricing" page, or by going to "My Account > Profile & Preferences" from the left side menu.

If you check this box, you will have the ability to customize the HTML in the body and head of your Authorize.net order page.

Step 5b – PayPal

If you select PayPal as the default ordering method, then you will be presented with these fields next:

- **PayPal Email field:** Enter in the PayPal account email address here where money for this membership should be sent.
- **PayPal Currency field:** If you want to receive money in another currency, select one of the ed currencies from the drop down list.
- **PayPal Auto Return field:** Enabling "Auto Return" will automatically redirect your visitors to the thank-you page instead of requiring them to click the "Return to Merchant" button once payment has been made. This is a good idea to implement.

Go to this page for instructions on setting it up in PayPal:

https://www.paypal.com/us/cgi-bin/webscr?cmd=p/mer/express_return_summary-outside

Step 5c – Default Ordering Method: 2Checkout

To learn more about 2Checkout, visit the website: <http://www.2checkout.com>

If you make 2Checkout your default option, you can also enable PayPal and Authorize.net if you would like. Be sure to complete your account information by following the link.

If you click that blue link, a new window will open up showing your Profile & Preferences page within Nanacast so you can add in your 2Checkout account information. The section for 2Checkout in the Profile & Preferences page looks like this:

6. Allow Affiliates

This option enables other people to sell your product and earn a commission for each sale.

If checked, Nanacast will automatically create a unique affiliate link for each person who is logged in to Nanacast and visits your directory sales page.

Allow Affiliates: ☒ Note: Affiliates promoting this product will also be credited for sales made from any of your other products as well. In other words, the affiliate tracking is done by publisher/affiliate and not by product/affiliate. This way you can promote backend products and your affiliates will still get credit.

Note: Your directory listing is set to "Private". Would you like to use your own URL as a Landing Page for affiliate traffic? If yes, check the box and enter your URL below:

Use Your Own URL for Affiliate Traffic: ☒ ?

Enter Landing Page URL for Affiliate Traffic:

http://

Append affiliate variables onto Landing Page URL query string: ☐ ?

Override Landing Page URL for Special Affiliates: ? [Add New Affiliate/Landing Page](#)

Choose Affiliate URL: [Remove](#)

Affiliate Commission Percent: %

Hide Affiliate Commission: ☐ ?

Note: Commissions are recurring for subscriptions.

Notice to US publishers: You will need to contact affiliates who earn over \$600 to obtain their W-9. Seek the help of a tax professional for more info.

6a - Use Your Own URL for Affiliate Traffic

Leave unchecked to use the default directory sales page.

If you would like to use your own URL as a Landing Page for affiliate traffic, check the box and enter your URL in the field below it.

If you use your own URL for affiliate traffic, then any traffic coming from your affiliates will forward on to your landing page. Make sure you have filled out the directory sales page HTML on the Edit Listing page if you don't plan on having affiliate traffic redirect to your own landing page.

Append affiliate variables onto Landing Page URL query string

Example affiliate link: <http://www.Nanacast.com/vp/12345/45678/56789/optional-made-up-tag/>

will redirect to:

http://example.com/your_redirect_script.php?product_id=12345&affiliate_id=45678&link_campaign_id=56789&custom_1=optional-made-up-tag

Note: Variables will be appended onto any special affiliate landing pages as well as the main landing page URL.

6b - Override Landing Page URL for Special Affiliates

Use this if you want a different landing page for a specific affiliate for this product.

6c – Affiliate Commission Amount

Enter the amount you want to pay your affiliates in your currency (not a %).

6d – Hide Affiliate Commission

Checkmark this box to hide the regular commission from affiliates in the affiliate center.

6e - Hide From Affiliate Center and Affiliate's Area checkbox

If you checkmark this box the system will not show your item in the affiliate center directory, and it will not show your item in your list of items that your affiliates can promote once they have joined your program. This way you can have a few private affiliates promote it without everyone knowing about it. Your private affiliates will have to use their own affiliate links using the following format: http://nanacast.com/vp/61772/AFFILIATE_ID/

Affiliate Center

The affiliate center can be seen by going to “Affiliate Promotion” in the left hand menu, then select “Affiliate Center”. There you can see affiliate links for publishers you have joined, and browse all publicly available affiliate programs.

Select an affiliate from the “Choose Affiliate” drop down list. To add more affiliates, click the “Add New Affiliate” link.

Getting new affiliates to join you

To populate the “Choose Affiliate” drop down list, mouse over Affiliate Manager in the left side menu, then select My Affiliates. In there are regular and customized affiliate links, which you can send to your affiliates to have them join as your affiliate in Nanacast.

7. Auto-Join subscribers to your Affiliate Program

Auto-Join subscribers to your Affiliate Program: ☒ ?

Hide Thank-You Page Link Within Membership Area: ☐

"Access The Content" Link Text: ?

Add Podcast or RSS Subscription Buttons to Membership: ☐ ?

Selected Buy It Now Button: ? [Change Image](#)



This option will automatically join the subscriber to your affiliate program so they can promote any products, podcasts, memberships or RSS Feeds where you offer an affiliate program.

8. Hide Thank-You Page Link Within Membership Area

If you hide this link, then if you have content pages/episodes (which you eventually should), there will be another link called "Access The Content" in the Purchases/Subscriptions area.

This option may be useful in the case that you want the thank-you page just to say thank-you and not have any content or download links in it. Your content would be accessed by logging into the membership area.

9. "Access The Content" Link Text

This is what the link text will be for the 'Access The Content' link shown on the Purchases/Subscriptions page in the member's area.

10. Add Podcast or RSS Subscription Buttons to Membership

This option will show the Podcast or RSS feed button on the thank-you page so that your subscribers can get the content via iTunes, Zune or other feed reader.

11. Selected Buy It Now Button

Here you can change the button seen on the sales page that you want visitors to click to subscribe to/buy your membership through the chosen payment processor.

If you want to change the button, click the Change Image link to select one from the pre-created buttons.

There is also a way to add in your own custom created button later by going to 'Create > 'Custom Buttons/Images'.

12. Show Gift-Certificate/Coupon Box in Directory Listing

Show Gift-Certificate/Coupon Box in Directory Listing: ☐

Coupon/Gift-Certificate Field Name:

Use Subscriber Access Limit: ☐

Create your Thank-You Page:
☒ **Use Dynamic Thank You Page**
☐ **Use Custom Thank You Page URL**

Max. Thank-you Page Clicks:
(Set this to '0' for unlimited)

Link Expires After Purchase: Hours
(Set this to '0' for unlimited)

If you want to use coupon codes checkmark this box. This box will appear in the General Information section in your membership sales page.

Coupon codes can be useful for inducing more purchases and for tracking the lead source.

Coupons can be set up later by going to "Create > Coupons" from the left side menu.

13. Coupon/Gift-Certificate Field Name

This is what the Coupon/Gift-Certificate field will be called on the form that your clients will see. The default is 'Gift-Certificate'.

14. Use Subscriber Access Limit

This feature limits the number of times a subscriber can access your membership through the “Access the Content” link. This way you can be notified if any undesirable activity is taking place, like podcast sharing or search engine indexing or membership sharing.

When checked there are two options to limit it:

1. **Unique IPs Per Day** – This option can ensure that the subscriber’s membership login information isn’t shared with many other people, such as by email or by posting a link to your thank you page on the web, by limiting the number of unique IP addresses that can access this membership each day.
2. **Total Loads Per Lifetime** – This option limits the number of times the membership content page can be loaded/viewed in total.

When the limit has been reached and a subscriber attempts to go to your “Access the Content” link, this message will appear:

15. Create your Thank-You Page

The default, dynamic thank you page, is the easiest and least technical option. If you have a thank-you page elsewhere that you want to send customers to, and have your server receive information about your customers via variables sent from Nanacast, then you would select the custom thank you page URL option.

If the Use Dynamic Thank You Page option is selected, you can create your Thank-You page within Nanacast and use the variables to make it dynamic, such as by adding in the person’s first name who purchased. The following steps will walk through the rest of these settings.

If the Use Custom Thank You Page URL option is selected, this selection will show a URL box to enter your custom page url. There is a check box to include custom variables.

There are instructions to follow on this page about how to use the variables.

16. Max. Thank-you Page Clicks

If you want to put content on your thank-you page and limit the number of times it can be viewed, then enter the number of times in this box.

You might use this to display a special video message in your thank-you page that will only work once to get your customers to pay attention and not leave right away.

You might also want to use this option to prevent excessive sharing of your content on this page. After the Thank-You page has been accessed the maximum number of times, a message will show on a blank page.

17. Link Expires After Purchase

You can specify how many hours the link will be good for after the purchase is made. For example, if you enter 3, then the link will work for three hours after the purchase is made. Enter 0 if you don’t want the link to ever expire.

Thank-You Page Background Color:Color: **Hide Login-Info Box at Bottom of Thank-You Page:** ☐ ?**Thank-you Page Content:** ?Paste in HTML or [Click Here to Use HTML Editor](#)

Possible Variables: {email} {firstname} {lastname} {access_code}? {itunes_url}? {standard_url}? {rss_url}? {zune_url}? {yahoo_url}? {google_url}? {aol_url}? {msn_url}? {bloglines_url}? {affiliate_link} {affiliate_id} {show_buttons}? {file_download_links}? {bonus_thank_you_page_url} {date} {join_date}

Tip: If you want any of your media files you added via episodes to show on the thank you page, you can use the {file_download_links} tag on your thank you page. Make sure you checkmark to 'Show link to this media file on thank-you or content pages' when editing each episode for each episode you want to be included in the file download links list.

Thank-You Head Tag HTML Code: (Use only if you have code that needs to be placed between <head> </head> tags.)

Tip: To preview your thank-you page, click Overview at the top, then click the "New" link to generate a new subscriber. After you save the new subscriber, go back to the subscriber listing page and click to edit the new subscriber, then click on the link to view the subscriber's thank-you page. This will display your fully-functioning thank-you page exactly like your subscribers will see it.

18. Thank-You Page Background Color

If you want the background border color to match a theme color for your pages, enter a color here. Either click on the white box to select a standard color, or enter a hex value.

19. Thank-you Page Content

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box.

If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

20. Thank-You Head Tag HTML Code

If you need to add in CSS or script, enter it in this box. It's not necessary to put anything in here though.

Membership Thank-You Email Subject: Receipt for your purchase/Access Info

Membership Thank-You Email Body:

Your login info:

Website: {login_url}
Username: {username}
Password: {password}

Possible Variables: {email} {firstname} {lastname} {access_code} {itunes_url}
{standard_url} {rss_url} {zune_url} {yahoo_url} {google_url} {aol_url}
{msn_url} {bloglines_url} {affiliate_link} {affiliate_id} {thank_you_page_url}
{bonus_thank_you_page_url} {login_url} {username} {password}
{general_purpose_login_url} {date} {join_date}

Activate Physical Product Fulfillment: ☐

Save Changes

21. Membership Thank-You Email Body

Dynamically generated variables with your subscribers' membership login info are inserted into this box by default. You can add in any other wording or variables you would like your subscribers to receive right after subscribing. Don't use HTML here, use plain text, so that your email will be formatted correctly for and visible in all email programs.

22. Activate Physical Product Fulfillment

If you have activated the Physical Product Fulfillment then skip to the next step otherwise click **Save Changes** and continue with the Membership Wizard.

Activate Physical Product Fulfillment: ☒

Physical Product Fulfillment Settings

Important Notes Regarding Shipping:

- The system will automatically add any missing shipping address fields to your custom fields list when you save this page.
- Because of the various dynamic shipping and tax fees that may be added, the total checkout price will always be displayed to your customers so they are fully aware of how much they'll be charged.
- If you choose "Free or One-Time Payment" and then "Free (No payment required)" for your pricing strategy above, then no payment will be collected regardless of any shipping, handling or tax fees that may be entered. This is so you can offer a truly-free shippable item. If you wish to collect shipping and handling, then you must use a different option for your pricing strategy. Tip: Use "Regular Pricing" and then enter '0.00' for the item price.

Allow customer to choose quantity ordered: ☐ (If unchecked, the quantity will always be 1)

Flat Handling Fee per Order at Checkout: ?

Please choose your product fulfillment service provider: Manual Fulfillment

USA Flat Shipping Fee at Checkout: ?

Canada Flat Shipping Fee at Checkout: ?

U.K. Flat Shipping Fee at Checkout: ?

Int'l Flat Shipping Fee at Checkout: ?

Tip: Leave the Product ID boxes blank if you don't wish to ship the first product, which may be the case if you plan on shipping products automatically later on but not when the initial purchase is made.

Product ID 1:	<input type="text"/>	(shipped at checkout) ?
Product ID 2:	<input type="text"/>	(shipped at checkout)
Product ID 3:	<input type="text"/>	(shipped at checkout)
Product ID 4:	<input type="text"/>	(shipped at checkout)
Product ID 5:	<input type="text"/>	(shipped at checkout)

Save Changes

22a. Allow customer to choose quantity ordered checkbox

If this box is checked, then your customers will be able to select how many physical versions of your product they want to order and pay for. If left unchecked, the quantity will always be 1.

22b. Flat Handling Fee per Order at Checkout field

This handling fee will be charged once per order, regardless of quantities ordered. If you would like to charge a flat handling fee per item, then that fee should be figured into the cost of each item.

22c. Please choose your product fulfillment service provider

For each of these fulfillment providers there is additional account related information you will need to fill in. Instructions are provided within Nanacast, as shown below.

- **Manual Fulfillment**
- **Kunaki.com**
- **Vervante.com**
- **Disk.com**

USA Flat Shipping Fee at Checkout

This shipping fee will be charged per unit ordered if the customer lives in the USA.

Canada Flat Shipping Fee at Checkout

This shipping fee will be charged per unit ordered if the customer lives in the Canada.

U.K. Flat Shipping Fee at Checkout

This shipping fee will be charged per unit ordered if the customer lives in the United Kingdom.

Int'l Flat Shipping Fee at Checkout

This shipping fee will be charged per unit ordered if the customer lives anywhere else in the world other than US, Canada or UK.

22d. Product ID fields

Enter a product ID you create for each physical product you will be sending out under this order.

An email notification will be sent out to any email addresses set up under Custom Fields/Notifications, and an outgoing remote API call will be triggered. These fields will be included in the email notification as 'Product ID 1', 'Product ID 2', etc... and will be included in the outgoing remote API call under the field names product_id_1, product_id_2, etc... These notifications will happen for the initial order placed at checkout and also for any recurring orders triggered by subscription payments.

23. Save

Click the save button to save everything you have put in and continue.

Membership Wizard Step 4

Upsells/Downsells

This is one of the best features in Nanacast. This enables you to dramatically increase your profit per order by offering customers who have already decided they want to buy from you related purchase offers.

Choose One-Click Upsell to Offer Before Thank-You Page:

Upsell Sales Page HTML:
Paste in HTML or [Click Here to Use HTML Editor](#)

Possible Variables: {email} {firstname} {lastname} {access_code} {itunes_url} {standard_url} {rss_url} {zune_url} {yahoo_url} {google_url} {aol_url} {msn_url} {bloglines_url} {upsell_buy_button} {decline_upsell_link_url} {date} {join_date}

Upsell Head Tag HTML Code: (Use only if you have code that needs to be placed between <head></head> tags.)

1. Select an Upsell

Choose One-Click Upsell to Offer Before Thank-You Page field

If this is the first item for sale you are setting up in Nanacast, nothing will be populated in the drop down menu. Once you have set up other items for sale in Nanacast, you can later come back to this page and add them in.

2. Upsell Sales Page HTML

You may want to customize the sales page to refer to why your buyers would want to buy this upsell as well and that just one click adds it to their order.

If you have created your HTML for this page in another HTML editor like Dreamweaver, simply copy it from there and paste it into this box. If you need an editor to create your HTML and prefer a Word-like format rather than dealing with HTML code, click on the "Click Here to Use HTML Editor" link to open up the WYSIWYG editor (What You See Is What You Get).

3. Upsell Head Tag HTML Code

If you want to add CSS or a script between the head tags <head></head> on this page. This is optional.

Selected Upsell Buy Button: [Change Image](#)



Don't send email receipt for upsell: ☐ ?

Decline Upsell Link Text: Default is: *No Thanks, I'll decline this offer*

This link will take customer to thank-you page of original product, or to the downsell page if a Downsell is selected below. Tip: Use the tag {decline_upsell_link_url} within your HTML to fully customize the decline link. (If you do use the {decline_upsell_link_url} tag somewhere in your HTML, the "Decline Upsell Link Text" will be ignored.)

Choose First One-Click Downsell:

No First Downsell

Save & Continue To Next Step >>

4. Selected Upsell Buy Button

Select the one-click upsell button you want to use. You can see the options by clicking the "Change Image" link.

5. Don't send email receipt for upsell

Checkmark this box if you don't want the email receipt to go out when someone buys this upsell. This is helpful if you want to keep the number of emails the person gets to a minimum. Just make sure you include instructions on how to access the upsell content on thank you page or in your original email receipt.

6. Decline Upsell Link Text

You can safely leave this option as the default "No Thanks, I'll decline this offer". If you want to customize the decline upsell link text, enter in text in this field. You may want to consider wording it in a way that gets your customers to second guess whether they should decline your offer, such as "No thanks, I'm willing to risk failing by not having these essential insider secrets."

7. Choose First One-Click Downsell

Other items you have published for sale in Nanacast populate the downsell drop down list. There are four downsells you can string together. For each one you select, the above customization options will be available.

8. Save & Continue To Next Step

Save your settings and continue with the Membership Wizard.

Membership Wizard Step 5

Edit Third-Party Email Autoresponder Sync

Nanacast is fully integrated with the following list management crm solutions:

OfficeAutoPilot.com, SendPepper.com, Aweber.com, Getresponse.com, Infusionsoft.com, iContact.com, ConstantContact.com, AnalyticApproach.com, MailChimp.com, and the popular stand alone script available at Autoresponseplus.com as well as any script like it that supports email based subscriber submissions.

Nanacast will send emails like access/thank you receipts and billing failure/credit card update requests. However, instead of also providing email follow up type crm we integrate with the best third party solutions in the industry for those functions. Nanacast can add to all the systems listed above as well as unsubscribe automatically, if you choose, from many of those solutions upon cancellation or refund by your clients in the Nanacast system. Nanacast can also optionally add any of your cancelled or refunded clients to what we call a "cancel" follow up funnel in any of those third party list management services which can be a great tool if you want to try and bring those clients back in with another offer or a "sorry to see you go" type follow up.

If you want to automatically send emails to your customers after they buy from you, then you can integrate any autoresponder account with Nanacast. You might want to use this to send out a welcome email, newsletters, offers or promotions, special events, etc.

When a client subscribes or buys, Nanacast can automatically add your subscriber in the background to one of your pre-existing email lists on these third party sites. Also, most services offer an "unsubscribe" feature whereby Nanacast.com can automatically unsubscribe the client from your email list when they unsubscribe or cancel their subscription in Nanacast.com.

Please choose your email list service provider: iContact.com

First go to <http://app.icontact.com/icp/core/externallogin> and enter your icontact.com login credentials. Once you login, enter the App-ID: **rPWNLVQPvspFaXfovF3SbOCeMiINvh7M** and register the app. You are registering our iContact API App titled "MemberLock" with your iContact account. Note that because of the complexity of the iContact API, only iContact accounts with one account ID and one client folder ID are supported. (If you don't know how many client folder IDs your account has, it probably just has one.)

- **Username:** This is your regular iContact.com Username.
- **Password:** This is your iContact.com Application Password you created when you registered the app. Note, this is NOT your regular iContact.com password.
- **List/Campaign:** This is your iContact.com List ID. In iContact, click My Contacts tab, then Lists. Click on the list you want to sync with. In the URL in your browser address bar it will look something like: <https://app.icontact.com/icp/core/mycontacts/lists/edit/117353/> Your list ID is the number at the end, so in this example your list ID would be: 117353

Username:

Password: ***** [Change](#)

List/Campaign:

Auto-Unsubscribe from email list when client cancels in SynergyCart.com: ☐

Save & Continue To Next Step >>

1. Please choose your email list service provider

If you want to subscribe and unsubscribe your customers to an email list service, select your autoresponder service from the drop down list and enter the requested information per the instructions.

Once you have made your selection, there will be specific instructions for each service shown and unique fields for each.

API Key field

If the service you select brings up an API Key field, get the API key from your service provider, then click the "Change" link to enter it in.

2. Save & Continue To Next Step

Click the button labelled Save & Continue To Next Step when you are done.

Membership Wizard Step 6

Edit Notifications and Custom fields

On this page you can choose what information you want to collect about your customers by adding in information fields. These fields will appear in the general information section of your membership's sales page.

The following are optional and can be added later. At this point you can save all your settings by clicking on **Click Here to Finish the Wizard**.

Add Unused Permanent Fields
Scroll Down to see your Active Custom Fields

Add title	Add business	Add address
Add address 2	Add city	Add state
Add zip	Add country	Add phone
Add fax	Add timezone	Add website
Add username	Add password	

Add Custom Field (30 Remaining)
Custom Fields Used: 0
Max Custom Fields Allowed: 30
[Add A New Custom Field That You Define](#)

1. Add Unused Permanent Fields

To add one of the standard fields shown below, click on the links of the fields you want to add.

1a. Set the Parameters of the Field

After you click on a field link, you will be taken to the “Add New Custom Field” page, where some of the settings will have been pre-defined for you.

Default Value field

If you want to have some default entry appear in this field, enter that in this field. One benefit of this is to save your customers time and hassle by reducing the amount of data entry in the buying process.

Field is Required checkbox

Without checking this checkbox, your customers can bypass this field without entering anything. With it checked, the webpage would keep your customers on the page and display a message in red that the field is required. Once the field is filled in, then the checkout button is clicked again, your customers can proceed to the payment process as usual.

Note: The system may require this field anyway even if you have this unchecked, depending on your other settings. For example, firstname, lastname and email are always required for memberships, and address is always required for shipped products.

Size

If the size field appears, such as for text entries, this refers to how many characters you want the field width to be. Leave it as 0 for the default size.

Show second verification box for client to re-type info checkbox

This will show a second box identical to this field and will say 'Re-Type FIELDNAME'. You've seen these before on forms, especially for emails and passwords where it requires you to re-type your email or password to confirm it was entered correctly. The system will show an error to the client if the fields do not match.

Auto-capitalize First Character checkbox

If this field appears and you check it, it will capitalize the first character entered into this field after the form is processed. This can be helpful for names, although the pre-defined first and last name fields do not contain this field.

Put field name and text box/drop-down box on two separate lines checkbox

This is helpful if your text box/drop-down box is really wide and is breaking the table width. It is rare that you would need to use this.

Alert Email checkboxes: If you check an alert email box, when the field this is a part of is processed and contains a value, you will receive an email at the address(es) you define in the Custom Field Settings section of the main page for Edit Notifications and Custom fields.

Save

Be sure to click the Save button at the bottom to save your entries.

2. Add Custom Field

To create a field that does not pre-exist, click the link “Add A New Custom Field That You Define”. You can add

up to 30 custom fields.

Most of those fields have been defined above. Now you get to select a type though, and there are different customization options that appear with each.

Textbox

This is a one-line text box field.

Text area

This is a multi-line text box field.

Checkbox

This is a checkbox preceded by text stating its purpose. There is an option to make it be checked by default. You can have only one checkbox per field.

Radio Buttons

Radio buttons give your customers just one option to select.

Drop-down Box

This is similar to radio buttons, in that you can have multiple options and only one can be selected, however it's presented in a drop down list format instead.

Hidden Field

Hidden fields are never shown on the actual form. They are placed on the form as a hidden html input tag. Hidden fields can be useful if you want to pass in variables to the embedded form. You can do this by appending variables onto the script src after creating your embedded form code for your website. This can also be done to all other types of fields on the form (except for checkboxes because their values cannot be passed in). The field name of a particular variable is the 'Field Name for Advanced API' which can be found when editing each field. For example, appending '&u_email=joeexample.com' onto the end of the script src URL will populate the email field with that variable.

Secret Field

Secret Fields are never shown on the actual form but are automatically added to the client's record when the form is submitted. Secret fields can be useful if you want to have a predetermined secret code in the notification email sent to an order fulfillment house as an additional security measure so the fulfillment house knows it is a legitimate order.

Save

Be sure to click the Save button at the bottom to save your entries.

3. Custom Fields Settings

Alert Email fields

If you checked the alert email box for any fields, make sure you have entered in email addresses into the corresponding alert email boxes here.

Activate Advanced Outgoing API checkbox:

You can also have an alert sent to your server via an API. Click the link "[Click here for full documentation on the Advanced Outgoing API](#)" for documentation on how to set that up.

Hide General Information Box around Custom fields checkbox:

This checkbox will hide the general information box as shown in the pictures below.

Save

Be sure to click the Save button within the Custom Fields Settings box to save your entries.

4. Active Custom Fields

Here you can edit and delete the custom fields you have set up.

Active Custom Fields

Drag and Drop the custom fields into the order you would like them to appear to the subscriber and then click to save. Note: You must click to save the changes in order for the changes to take effect.

Save

[Edit](#) [Delete](#) **First Name** (firstname)

Alert Email 1: ☐ Alert Email 2: ☐ Alert Email 3: ☐

[Edit](#) [Delete](#) **Last Name** (lastname)

Alert Email 1: ☐ Alert Email 2: ☐ Alert Email 3: ☐

[Edit](#) [Delete](#) **Email** (email)

Alert Email 1: ☐ Alert Email 2: ☐ Alert Email 3: ☐

Save

Click Here To Finish The Wizard

If you click the Delete link, a confirmation alert will pop-up. Click OK to confirm the delete.

Alert Emails

You can easily enable alert emails for any of those fields by check marking the corresponding checkbox for the email you want it to go to. Then click Save.

Save

Be sure to click the Save button within the Active Custom Fields box to save your entries.

5. Click Here to Finish The Wizard

You've made it! Click the button to save your membership and finish the wizard. You can come back and edit any of those pages later through the Manage > Memberships menu selection on the left side.