



Member App Testing Guide

Date: May 16, 2017

Apply

1. Begin by navigating to <http://www.massbio.stage2.getfused.com/create-account-screener>
2. Enter company email address. The email domain may not be an existing Member Company domain and does not need to be valid. Example: lmeyer@getfusedtest.com
3. Complete and submit application, populating all required fields.

Approve and Send to CRM

1. Begin by navigating to the tools site:
<http://massbio.tools.stage.getfused.com/admin/cms/contentEntry/list>
2. Select "Member Applications" in left navigation.
3. Select the name of the company which was used to test.
4. Review fields to ensure they match application.
5. At top of application, select orange button "Approve and Send to CRM"

Confirm Lead in CRM

1. Navigate to CRM Sandbox, <https://dvpmassbio.crm.dynamics.com/>
2. Select "Microsoft Dynamics CRM" in header.
3. "My Active Companies" should appear. Directly to right of this title is dropdown arrow. Select "New Leads" from drop down.
4. Find new lead in list, select company name.

Confirm Update

These items have been pulled from Judy's previous discussion with MassBio team. Please see screenshots with relevant highlighted information to reference each request.

Membership record was created but not linked and did not have all the information - The membership record did not populate on the Company record under the field for Primary Membership.



ACCOUNT INFORMATION

Company Name *	Company Name
Relationship Type	Lead
Member Since	--
Parent Company	--
Category	Associate Industry
Subcategory	Environmental, Health & Safety Consulting
Primary Membership	Company Name: Pending - New Member, Expires 04/2018
Phone	6175002606
Website	http://getfused.com
Fax	--

Dues rate was not calculated

Not pulling into company record field

Can we auto-populate the http:// or https:// on the web address field? When it is missing it gives an error, and most users just enter the www. If not doable, we can add a note to the field to include it.

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- http:// is appending successfully. I do not think that we have the ability to detect an SSL and can't apply https: as needed. If a site is SSL'd the user will still be taken to the site, but have to get around the "error"??

Remove "location name" field



- No longer appears.

When CRM info comes in, the company needs to say LEAD (not member)

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'Term' in membership record is giving an extra month

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- This test was submitted 5/16/2017. The current configuration will set the expiration to 11 months post-apply. In this example, the expiration date will be 4/30/2018.



'Revenue' does not seem to be carrying through application process

◀ Details

COMPANY PROFILE

Employees in MA	56
Employees Worldwide	3,467
Bio Annual Revenue	\$12,345,678.00
Currency	US Dollar
Incorporation Date	--
MassBioEd Supporter	No
Supplier?	No
Supplier Discount %	--
Has Cleanroom?	Yes
Has Labs?	Yes

So whatever amount we entered in the application for Annual Revenue would factor into the Dues Calculations, so if it did not populate the number for revenue on the membership record, or company record, it would not properly calculate the dues amount the new member would owe.

Hamburger menu in header > Membership > Dues Calculator, confirmed using several tests.