How to Review and Approve Membership Signups

Overview

When families submit a membership application through your co-op's public website, their application lands in the **Membership Signups** queue. You review each application and approve, decline, or put it on hold.

> **Note:** The screenshots below were captured before any membership applications were submitted. Screenshots showing populated application rows and the application detail view will be added once real signups exist in the demo account.

Step 1: Open the Membership Signups queue

1. Sign in to your admin panel at `yourcoopname.cooplyhq.com`.
2. In the left sidebar, click **Membership Signups**.

Membership Signups page showing empty state and sidebar navigation — desktop view

The **Membership Signups** page opens and shows all applications, organized by status tab.

Step 2: Understand the application statuses

Use the status tabs at the top of the page to filter applications:

Tab	What it shows
All	Every application regardless of status
Completed	Applications that are fully approved and the family has active membership
Awaiting Payment	Approved applications waiting for the family to complete payment
Paid — Pending	Payment received; awaiting your final approval
On Hold	Applications you have paused pending more information
Rejected	Applications you have declined
Draft	Incomplete applications the family has not yet submitted
Abandoned	Applications started but not submitted within the expiry window

Each row in the list shows:

Column	What it shows
Applicant	The primary contact name for the applying family
Seats	Number of membership seats requested
Status	Current application status
Submitted	Date the application was submitted

> **Populated application list screenshot coming soon.** This will be added once families have submitted membership applications.

Step 3: Review an application

1. Click any row in the Membership Signups list to open the application detail.

The application detail page shows:

Primary Contact

- Full name, email address, and phone number of the parent or guardian who submitted the application

Household Details

- Names and ages of household members being added as co-op members
- Total seats requested

Membership Plan

- The plan the family selected and its price

Actions panel

- Buttons to take action on the application: **Approve**, **Put On Hold**, or **Reject**

> **Application detail screenshot coming soon.** This will be added once a real application exists in the demo account.

Step 4: Approve an application

1. On the application detail page, click **Approve** in the Actions panel.
2. Confirm the approval in the dialog that appears.

What happens next:

- If the selected membership plan has a cost, the application moves to **Awaiting Payment** and the family receives an email with a link to complete checkout.
- If the plan is free, the application moves directly to **Completed** and the family receives access to your co-op.
- The family appears in your member directory once their status reaches **Completed**.

Step 5: Put an application on hold

Use **Put On Hold** when you want to pause an application without declining it — for example, if you need more information from the family or are at capacity.

1. On the application detail page, click **Put On Hold**.
2. Optionally, add a reason in the dialog.
3. Click **Confirm** to save.

The application moves to the **On Hold** tab. You can return to it at any time and approve or reject it.

Step 6: Reject an application

1. On the application detail page, click **Reject**.
2. Optionally, add a reason in the dialog. The family will not see this reason unless you choose to communicate it separately.
3. Click **Confirm** to reject.

The application moves to the **Rejected** tab. The family is notified by email that their application was not approved.

What's next

- How to Invite Families and Manage Your Member Directory — invite families directly and manage their membership status
- How to View and Manage Membership Payments — track payment orders and Stripe payouts once families have completed checkout

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