

# Setting up your Membership Types

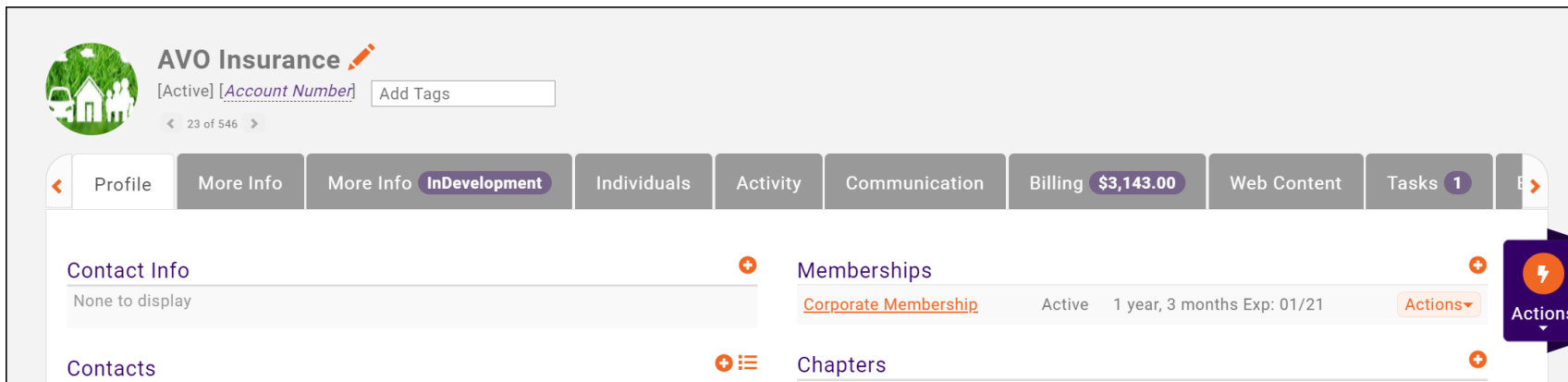
# Agenda

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- Overview of Membership
- Membership Global Settings
- How to create Membership Types
- Add Pricing to a Membership Type
- Add Levels to a Membership Type
- Add Directory/Category to Membership Type
- Add Custom Fields to Membership Type

# Overview of Membership Types

Your membership types allow you to define the membership packages you wish to offer to your members. In addition, Membership Types can be used for providing discount to events, limit event registration, limit store purchases, differentiating directory listings and more



The screenshot shows a user profile for "AVO Insurance" with a green circular profile picture. The status is "[Active]" and there is a field for "[Account Number]" and "Add Tags". A navigation bar includes tabs for Profile, More Info, More Info (with "InDevelopment" badge), Individuals, Activity, Communication, Billing (\$3,143.00), Web Content, and Tasks (1). Below the navigation bar, there are sections for "Contact Info" (None to display), "Memberships" (Corporate Membership, Active, 1 year, 3 months Exp: 01/21), and "Contacts". An "Actions" button is visible on the right side of the Memberships section.

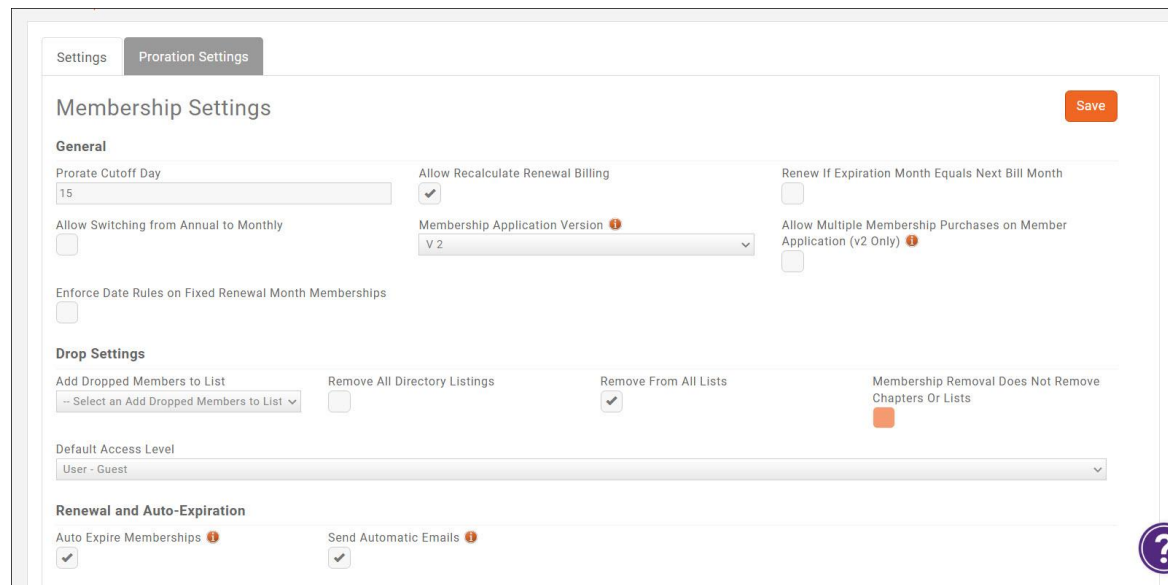
# Think about your membership structure...

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- ✓ Do the directory listings that you offer your members vary based on membership type?
- ✓ Do you offer both business and individual memberships?
- ✓ Do you have set terms for your memberships?
- ✓ Do you wish members who have not paid to be automatically dropped?
- ✓ Do all of your memberships renew on the same day (i.e. January 1<sup>st</sup>)
- ✓ Do you have bundled dues?
- ✓ Do you wish pricing to be automatically recalculated?
- ✓ Do you wish to pro-rate dues?
- ✓ Do your memberships have levels?

# Global Membership Settings

- Several global settings maybe configured for your memberships that will then apply to all membership types and establish how memberships will work in your database.
- KB: [Global Membership Settings](#)



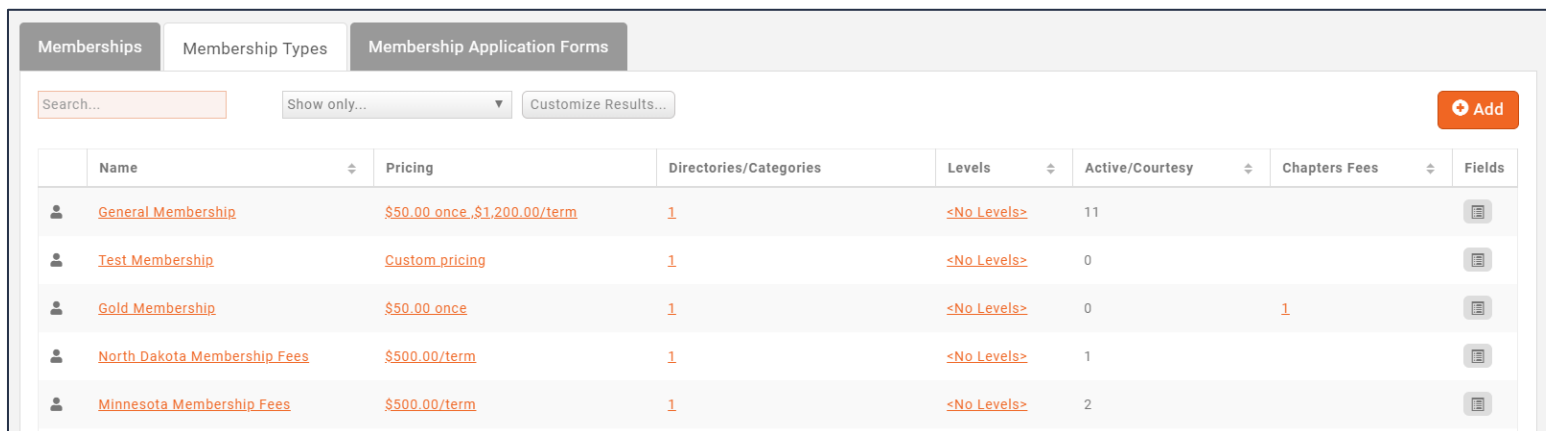
The screenshot displays the 'Proration Settings' tab within the 'Membership Settings' section of the GrowthZone software. The interface is organized into several sections:

- General:** Includes a 'Prorate Cutoff Day' field set to '15', a checked 'Allow Recalculate Renewal Billing' checkbox, an unchecked 'Renew If Expiration Month Equals Next Bill Month' checkbox, an unchecked 'Allow Switching from Annual to Monthly' checkbox, a 'Membership Application Version' dropdown menu set to 'V 2', and an unchecked 'Allow Multiple Membership Purchases on Member Application (v2 Only)' checkbox. There is also an unchecked 'Enforce Date Rules on Fixed Renewal Month Memberships' checkbox.
- Drop Settings:** Features a dropdown for 'Add Dropped Members to List' (set to '-- Select an Add Dropped Members to List --'), an unchecked 'Remove All Directory Listings' checkbox, a checked 'Remove From All Lists' checkbox, and an unchecked 'Membership Removal Does Not Remove Chapters Or Lists' checkbox.
- Default Access Level:** A dropdown menu set to 'User - Guest'.
- Renewal and Auto-Expiration:** Includes a checked 'Auto Expire Memberships' checkbox and a checked 'Send Automatic Emails' checkbox.

A 'Save' button is located in the top right corner of the settings panel. A help icon (question mark) is visible in the bottom right corner of the interface.

# View Membership Types

- Membership Types allow you to define the membership packages you wish to provide to your members
- These membership types may be included on your membership application form
- KB: [View Membership Types](#)



	Name	Pricing	Directories/Categories	Levels	Active/Courtesy	Chapters Fees	Fields
👤	<a href="#">General Membership</a>	<a href="#">\$50.00 once, \$1,200.00/term</a>	1	<a href="#">&lt;No Levels&gt;</a>	11		📄
👤	<a href="#">Test Membership</a>	<a href="#">Custom pricing</a>	1	<a href="#">&lt;No Levels&gt;</a>	0		📄
👤	<a href="#">Gold Membership</a>	<a href="#">\$50.00 once</a>	1	<a href="#">&lt;No Levels&gt;</a>	0	1	📄
👤	<a href="#">North Dakota Membership Fees</a>	<a href="#">\$500.00/term</a>	1	<a href="#">&lt;No Levels&gt;</a>	1		📄
👤	<a href="#">Minnesota Membership Fees</a>	<a href="#">\$500.00/term</a>	1	<a href="#">&lt;No Levels&gt;</a>	2		📄

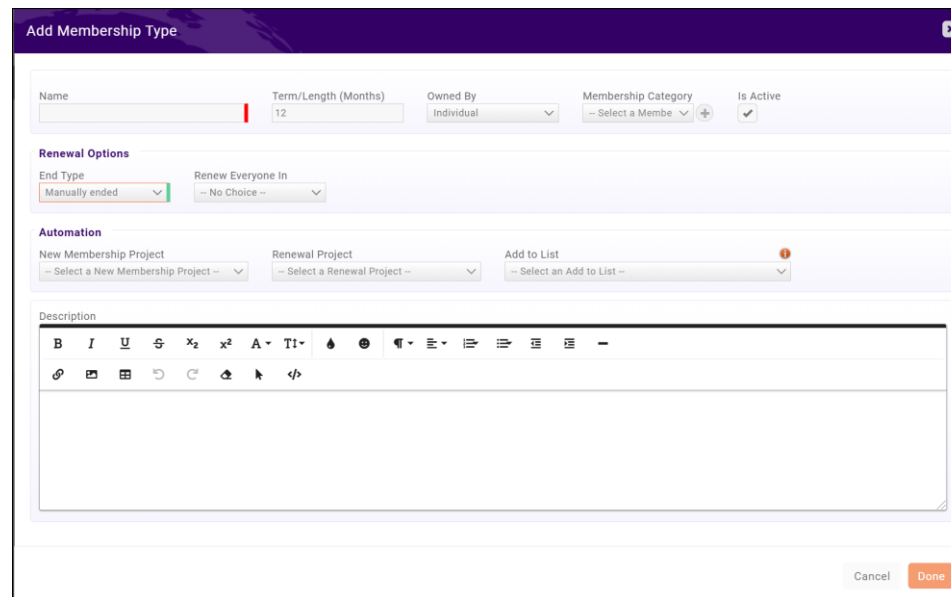
# Add a Membership Type

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- Prerequisites:
- Setup Goods/Services for line items to be included in your memberships
- Setup the Directory and Directory Listing to be included with your memberships

# Add a Membership Type

- Memberships > Membership Types > Add
- KB: [Add a New Membership Type](#)



The screenshot shows the 'Add Membership Type' form with the following fields and options:

- Name:** Text input field.
- Term/Length (Months):** Text input field with the value '12'.
- Owned By:** Dropdown menu with 'Individual' selected.
- Membership Category:** Dropdown menu with '-- Select a Membe --' and a plus icon.
- Is Active:** Checkmark icon.
- Renewal Options:**
  - End Type:** Dropdown menu with 'Manually ended' selected.
  - Renew Everyone In:** Dropdown menu with '-- No Choice --' selected.
- Automation:**
  - New Membership Project:** Dropdown menu with '-- Select a New Membership Project --'.
  - Renewal Project:** Dropdown menu with '-- Select a Renewal Project --'.
  - Add to List:** Dropdown menu with '-- Select an Add to List --' and an information icon.
- Description:** Rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, and undo.

At the bottom right of the form are 'Cancel' and 'Done' buttons.



# Add a Membership Type

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Once a membership type has been created you may:

- Add Membership Pricing
- Add Directory/Categories
- Add Levels

# Add Pricing to A Membership Type

- KB: [Add Pricing to a Membership Type](#)

Payment Gateway: -- Select a Payment Gateway --  
Invoice Template: -- Select an Invoice Template --  
Payment Terms: -- Select a Payment Terms --  
Terms/Conditions: -- Select a Terms/Conditions --

Formula Based Pricing  
 Prorate Partial Years

Does your Membership have pricing levels? Enter the base price below (if any). Then enter your pricing on the Levels screen for this Membership Type.

**Recurring Fees**

Item	Description	Price (12 mos.)
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**Setup/One-Time Fees**

Item	Description	Price	Hide
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**Discount**

Discount	Name	Promo Code	Start Date	End Date
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**Payment Options**

Round the Per Bill Amount:

Allow	Frequency	Proration Interval	Allow Invoicing	Allow Credit Cards	Per Bill Amount	Price Change %
<input type="checkbox"/>	Monthly		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	0
<input type="checkbox"/>	Quarterly		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	0
<input type="checkbox"/>	Semiannually		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	0
<input checked="" type="checkbox"/>	Annually	No Proration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	0

# Membership Type Setup...

- You can setup your membership types to allow applicant to select category(ies) and tie a Directory and listing to a membership type
- If you have setup your membership types to allow selection of categories, new applicants can assign themselves to categories
- KB: [Membership Type/Setup Directory](#)

**Edit Membership Benefits - General Membership** < 1 of 17 >

**Directory Listing** ⓘ

Directory: Active Member Directory | Directory Display: Deluxe Listing

**Directory Categories**

Display Directory Categories:

Category List: Business Category | Minimum Required: 1 | Maximum Allowed: 1

Cancel Done

# Questions?