Setting up your Membership Types
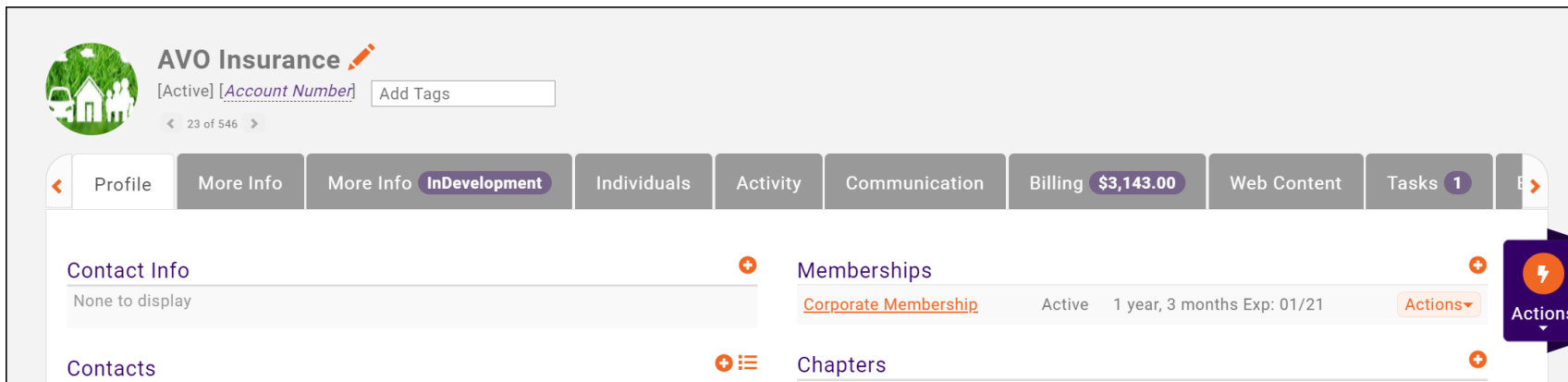
GrowthZone

smarter association software

Agenda

- 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

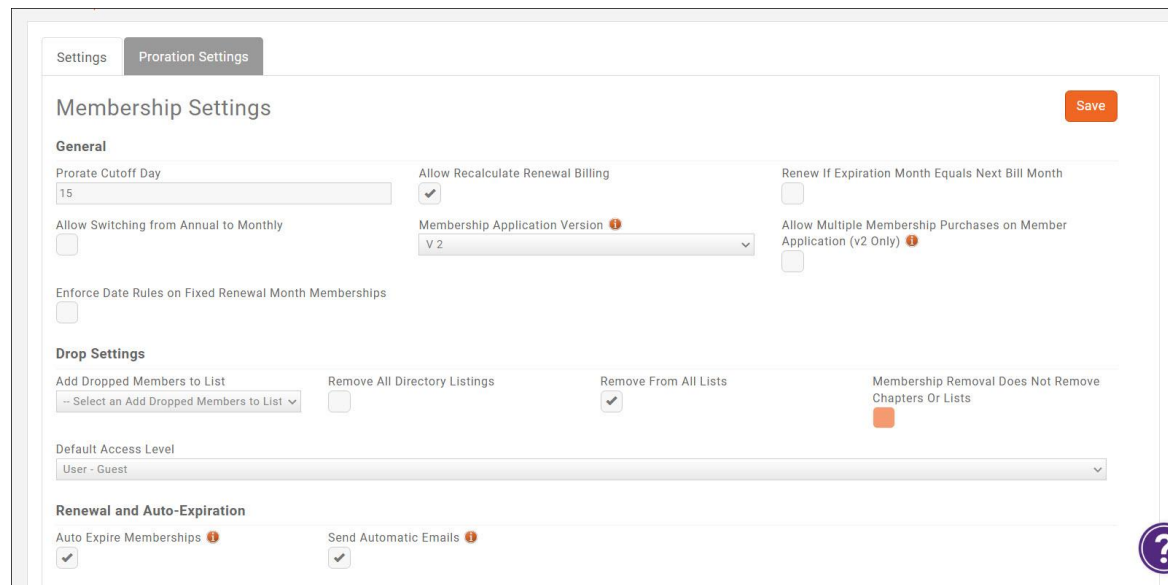# Think about your membership structure…

- ✓ 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 1st)
- ✓ 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.
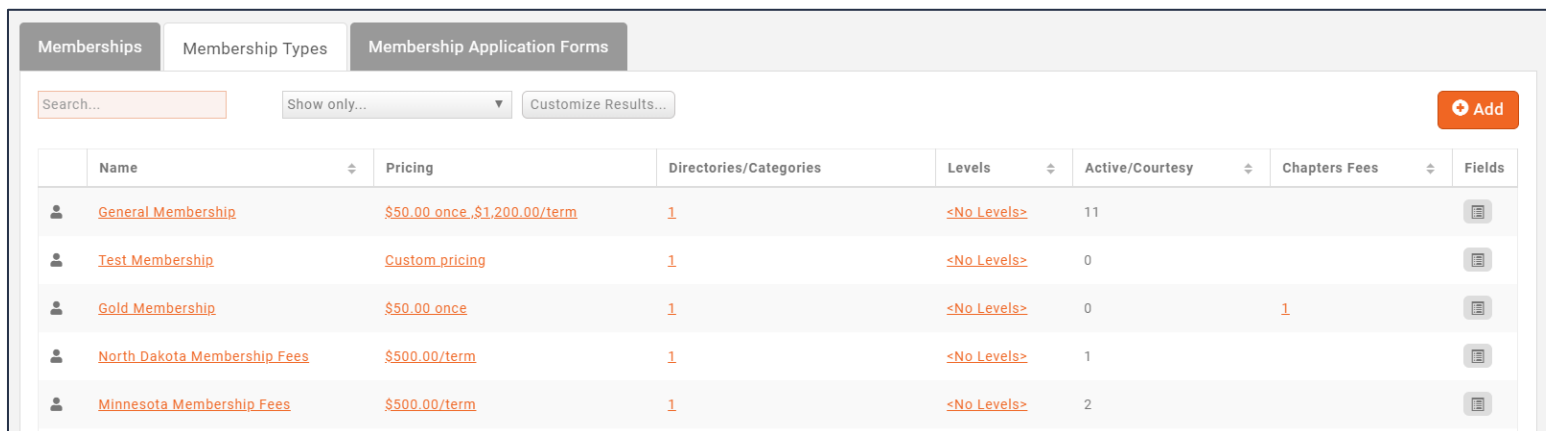
- KB: Global Membership Settings

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
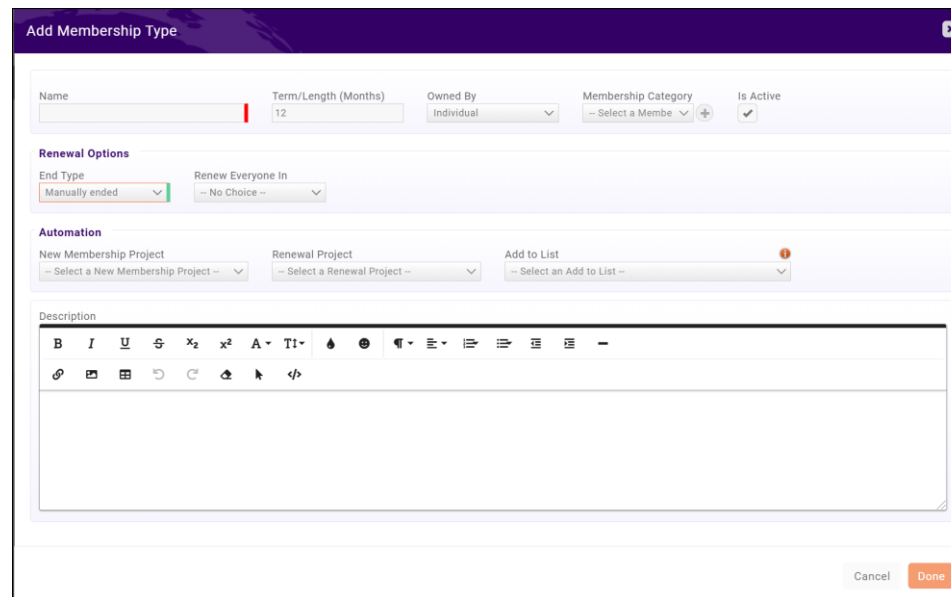- KB: <u>View Membership Types</u>

Add a Membership Type

- 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

Add a Membership Type

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

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

Questions?