

Setting up Your Membership Types

Overview of Membership

Directories/Directory Listings

How to create Membership Types

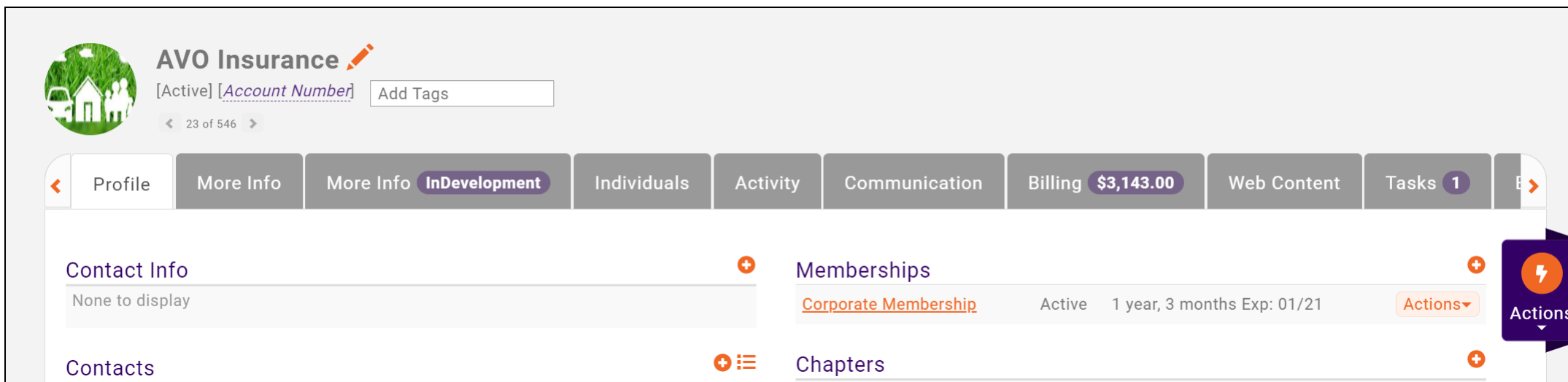
Add Pricing to a Membership Type


Add Levels to a Membership Type

Add Directory/Category 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






AVO Insurance 
[Active] [\[Account Number\]](#)
◀ 23 of 546 ▶

◀ Profile More Info More Info **InDevelopment** Individuals Activity Communication Billing **\$3,143.00** Web Content Tasks **1** ▶

Contact Info 
None to display

Memberships 
[Corporate Membership](#) Active 1 year, 3 months Exp: 01/21 **Actions**▼

Chapters 


Actions 

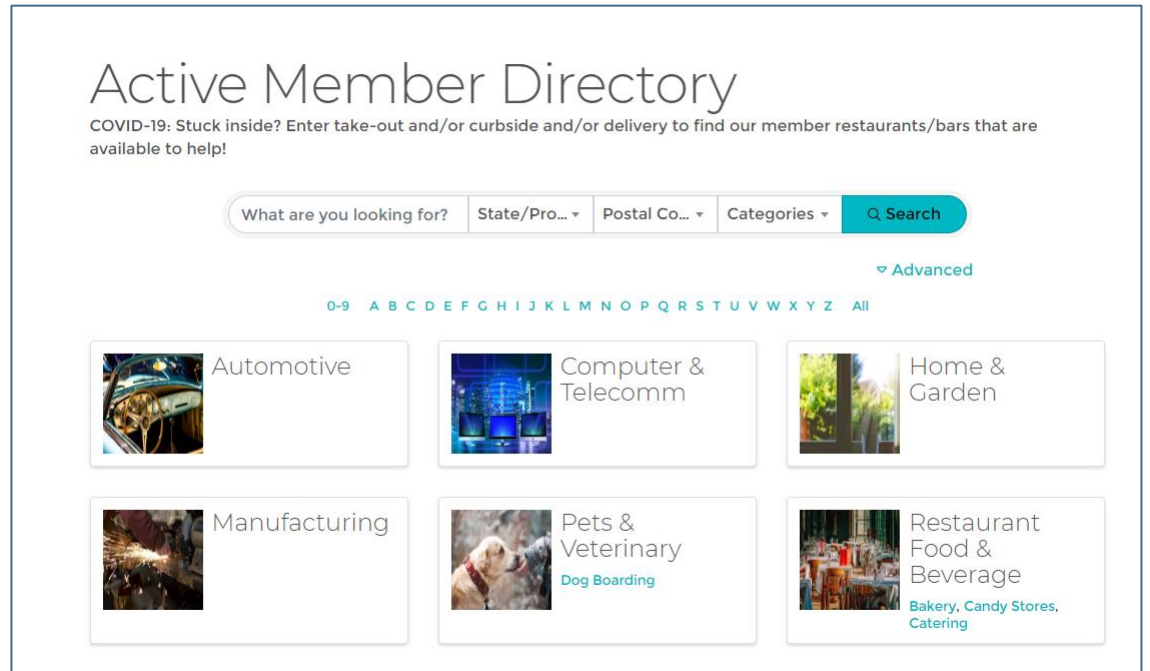
As you think about your membership structure...



- ✓ 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 wish to pro-rate dues?
- ✓ Do your memberships have levels?
- ✓ Do the directory listings that you offer your members vary based on membership type?

Your Membership Directory is a key benefit you can offer to your members....







- ❑ Through the directory, members can gain additional visibility to the general public and other members
- ❑ With your GrowthZone software you create multiple directories, as well as offer different directory listing packages



Setup Directory Categories

Directory categories provide a way to categorize your members, making it easy for visitors to your web-site to find just the member they are looking for....

You can organize your categories by Parent/Child categories

 <p>Automotive</p>	 <p>Computer & Telecomm</p>	 <p>Home & Garden</p>
 <p>Manufacturing</p>	 <p>Pets & Veterinary <i>Dog Boarding</i></p>	 <p>Restaurant Food & Beverage <i>Bakery, Candy Stores, Catering</i></p>

Setup Directory Categories

Create your Directory Categories – two step process:

1. Create a Directory Category List
2. Add Directory Categories to the List

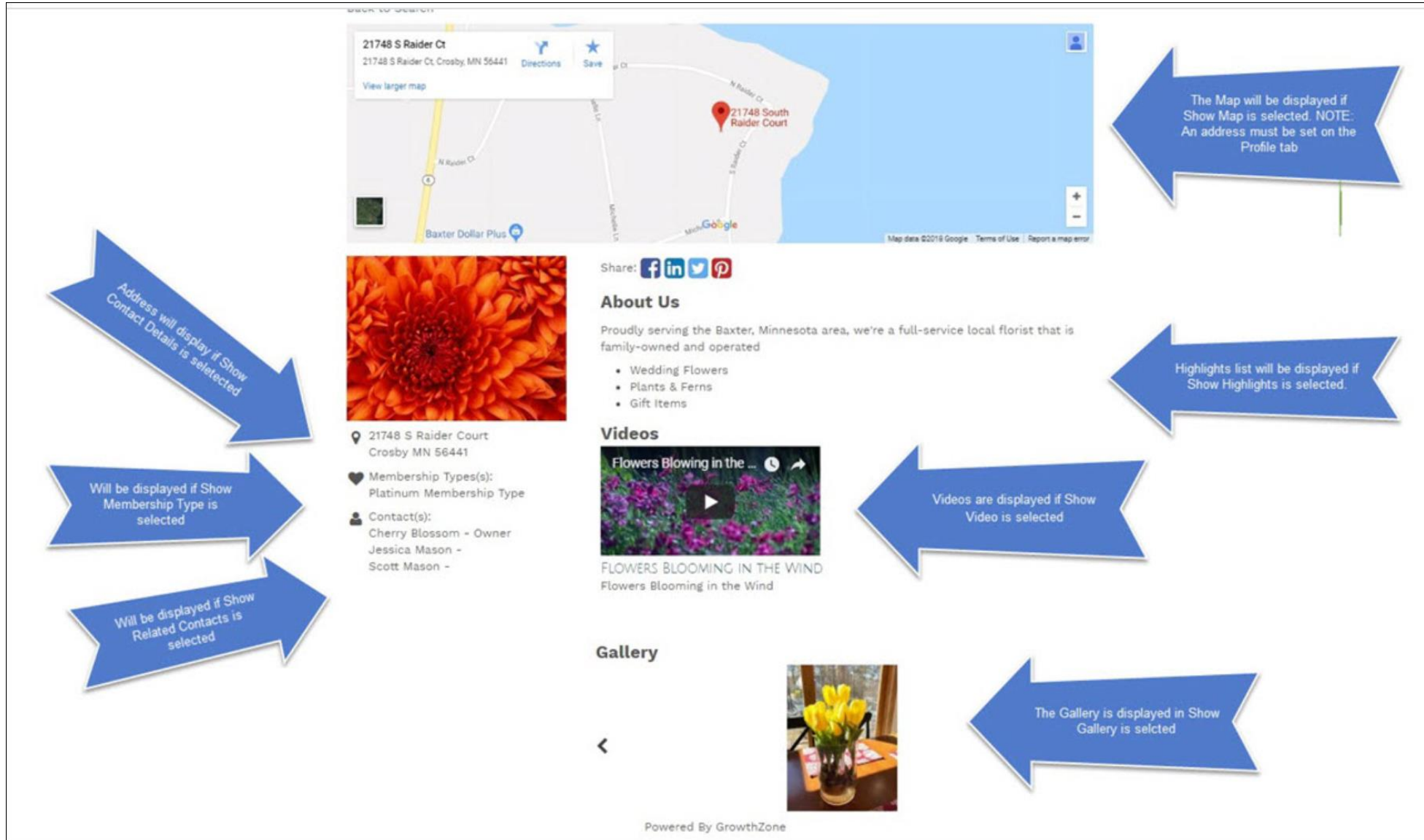
KB: [Directory Category Lists](#)

Category Items				+ Add Multiple	+ Add
Name	Parent	Description	Actions		
Manufacturing			×		
Restaurant Food & Beverage			×		
Automotive		Automotive	×		
Candy Stores	Restaurant Food & Beverage		×		

Directory Display Settings control what information about a business or individual is displayed if you choose to publish a directory of members to your website.

Do you want to offer different listing levels? You may, perhaps, have different levels of listings based on membership type. A basic level might include just a business name and a logo, where as an enhanced listing may include photo galleries, videos, maps, etc.

Setup Your Directory Display Settings



The screenshot displays a directory profile for a florist. The profile includes a map, an 'About Us' section with a list of services, a 'Videos' section, and a 'Gallery' section. Blue arrows point to specific elements, explaining when they will be displayed based on the user's settings.

Annotations:

- Address will display if Show Contact Details is selected** (points to the address field)
- Will be displayed if Show Membership Type is selected** (points to the membership type field)
- Will be displayed if Show Related Contacts is selected** (points to the contact list)
- The Map will be displayed if Show Map is selected. NOTE: An address must be set on the Profile tab** (points to the map)
- Highlights list will be displayed if Show Highlights is selected** (points to the 'About Us' section)
- Videos are displayed if Show Video is selected** (points to the video player)
- The Gallery is displayed in Show Gallery is selected** (points to the gallery image)

Profile Details:

- Address:** 21748 S Raider Ct, Crosby, MN 56441
- Membership Types(s):** Platinum Membership Type
- Contact(s):** Cherry Blossom - Owner, Jessica Mason - , Scott Mason -
- Services:** Wedding Flowers, Plants & Ferns, Gift Items
- Video:** Flowers Blooming in the Wind
- Gallery:** Image of yellow tulips in a vase

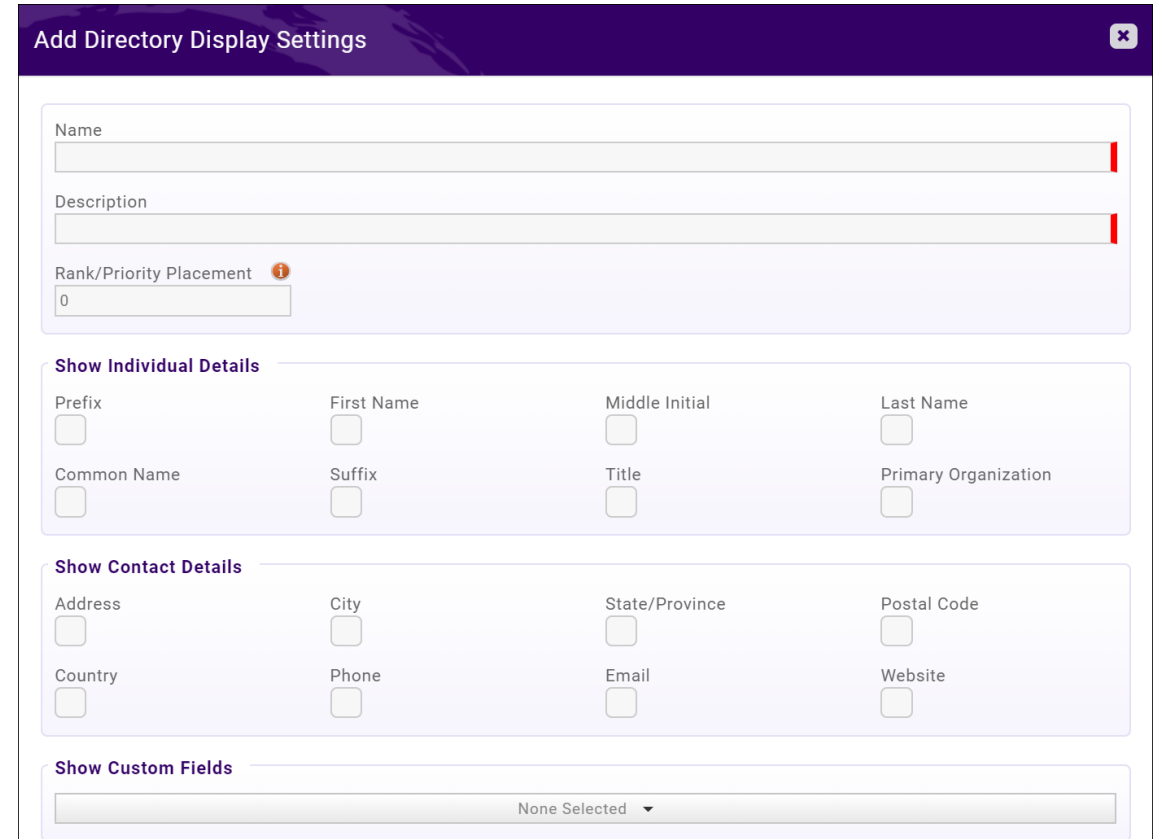
Powered By GrowthZone

Setup Your Directory Display Settings

What information do you wish to display:

- ☐ Names?
- ☐ Addresses?
- ☐ Phones?
- ☐ Emails?
- ☐ Custom Fields?
- ☐ Related Contacts?
- ☐ Highlights?
- ☐ Photos/Videos/Search Logo?

KB: [Setup Directory Display Settings](#)



The screenshot shows a dialog box titled "Add Directory Display Settings" with a close button (X) in the top right corner. The dialog contains several input fields and sections:

- Name:** A text input field.
- Description:** A text input field.
- Rank/Priority Placement:** A text input field with an information icon (i) and the value "0".
- Show Individual Details:** A section with a header and a grid of checkboxes for:
 - Prefix, First Name, Middle Initial, Last Name
 - Common Name, Suffix, Title, Primary Organization
- Show Contact Details:** A section with a header and a grid of checkboxes for:
 - Address, City, State/Province, Postal Code
 - Country, Phone, Email, Website
- Show Custom Fields:** A section with a header and a dropdown menu currently showing "None Selected".

You system will contain a default directory, Active Member Directory. This directory is tied to your Business Category and may contain all of your valued members.

Do you want multiple directories?

- ❑ You can create as many directories as needed to support your members. Perhaps directories that represent several different entities (for example Chapters) or categories (Restaurants?)

Setup Your Directory(ies)

KB: Setup Directories

Add Directory

Name

Display Name

Description

Display Settings

Standard Listing

Sort Order

0

Category Lists (Categories displayed on the front page)

Category List

Ordering

Order Category Results

Randomly

Availability

Available to Public

☐

Available to Info Hub

☐

Search Filtering

Enable Advanced Search and Filtering

☐

Advanced Options

☒

Cancel

Done

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](#)

Memberships							
Membership Types							
Membership Application Forms							
<div>Search...</div> <div>Show only...</div> <div>Customize Results...</div> <div>+ Add</div>							
	Name	Pricing	Directories/Categories	Levels	Active/Courtesy	Chapters Fees	Fields
	General Membership	\$50.00 once, \$1,200.00/term	1	<No Levels>	11		
	Test Membership	Custom pricing	1	<No Levels>	0		
	Gold Membership	\$50.00 once	1	<No Levels>	0	1	
	North Dakota Membership Fees	\$500.00/term	1	<No Levels>	1		
	Minnesota Membership Fees	\$500.00/term	1	<No Levels>	2		

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 Membership Type

Name

Term/Length (Months)

12

Owned By

Individual

Membership Category

-- Select a Membe --

Is Active

☒

Renewal Options

End Type

Manually ended

Renew Everyone In

-- No Choice --

Automation

New Membership Project

-- Select a New Membership Project --

Renewal Project

-- Select a Renewal Project --

Add to List

-- Select an Add to List --

Description

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Cancel

Done

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

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.)
------	-------------	-----------------

Setup/One-Time Fees

Item	Description	Price	Hide
------	-------------	-------	------

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

Add Directory/Categories to Membership Type

Membership Types may associate to a particular **Directory**, and to a set of **Directory Display Settings**. Directory Display Settings control what information is displayed in the directory for a business or individual

Results: 1



Macaroon's | 2189968574

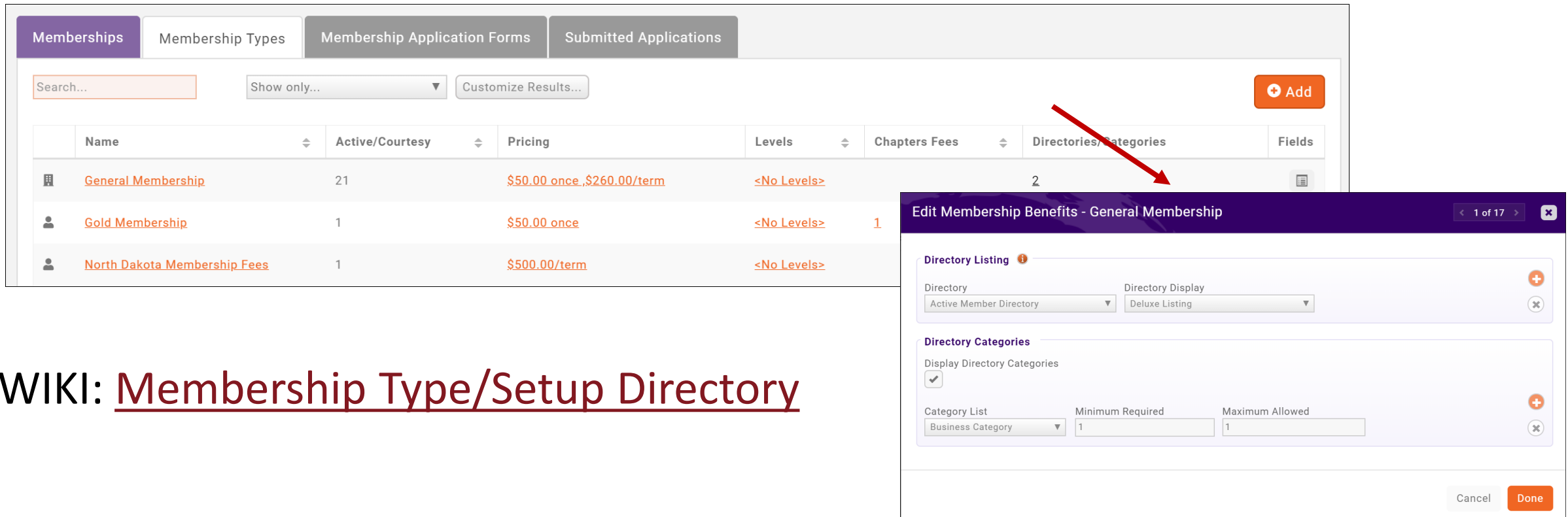
Best Macaroons ever

896547 Main Street, MN 564478

[Learn More](#)

Membership Type Setup...

- ❑ You can setup your membership types to allow applicant to select category(ies)
You can 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



Memberships | Membership Types | Membership Application Forms | Submitted Applications

Search... Show only... Customize Results... + Add

	Name	Active/Courtesy	Pricing	Levels	Chapters Fees	Directories/ Categories	Fields
🏠	General Membership	21	\$50.00 once, \$260.00/term	<No Levels>		2	
👤	Gold Membership	1	\$50.00 once	<No Levels>	1		
👤	North Dakota Membership Fees	1	\$500.00/term	<No Levels>			

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

WIKI: [Membership Type/Setup Directory](#)

Questions?