Getting Started with Benefit Tracking

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Introduction

Your association may wish to offer **tiered membership** dues so that members can select a membership that is more meaningful to them and you can generate additional revenue.

In order to do so, with the Benefit Tracking module, you are able to tie benefits to memberships and easily track and report on their usage. This will allow you to easily demonstrate member value so that your members renew.

Benefit Tracking Steps

1. Create Benefit Discount
2. Create your Benefit Items.
3. Create Benefit Packages composed of Benefit Items.
4. Associate Benefit Packages to Membership Types or Membership Levels.
5. If you've previously been tracking benefits in a spreadsheet (or other location), manually assign benefit packages to existing memberships and record their previous usages.
6. Begin tracking benefits by recording usage, adjusting remaining, reporting, viewing and communicating to benefit owners.

Create Discount Type

Discount types are used as a way of categorizing, filtering and reporting on discounts that you may offer towards memberships, events, etc.

Create Benefit Discount

The Benefit **Discounts** allow you to configure the actual discounts that can be used when creating your Benefit Items. You can create as many Benefit Discounts as necessary.

Create Benefit Item

Edit Benefit Item ✕

Benefit items are the individual benefits that you offer your members.

Tip! Editing a Benefit item will change existing benefit assignments. The details of a Benefit Item, such as the Name, Usage Availability, Category, Value, or Discount, will apply to any existing assignments that are still remaining to be used.

Name * ⓘ

Golf Benefit 100%

Description ⓘ

Benefit Type ⓘ

Event registration ▾

Value ⓘ

Discount * ⓘ

Point Resolution ▾

Category ⓘ

▾

Allow Use By ⓘ

All Individuals of the Business ▾

☑ **Is Active** ⓘ

Delete   Cancel   **Done**

• Prior to building benefit packages you create the benefit items to be included in those packages.

• For example: benefits for a particular membership include registrations to the golf tournament, one banner ad, and use of the conference room.

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Create Benefit Package

Benefit packages allow you to group together a set of benefit items. You will then assign these packages to membership types so that your members are assigned benefits based on their membership.

We recommend that you create a benefit package each year. You can easily do so by using the copy function.

Assign Benefit Package to Membership

	Name ⇅	Description ⇅	Package Start Date ⇅	Package End Date ⇅
☑	Standard Membership Benefits		1/1/2024	12/31/2024

Cancel   Done

By assigning Benefit Packages to Membership Types or Levels you ensure that your members are automatically given their benefits.

Assign Benefits to Existing Members

Now that you have tied benefits to a membership type, any new or renewing members will automatically be assigned the benefits.

Tie Benefits to Event Registrations

You can tie a benefit item to an event registration. With this set up the contact would automatically receive the benefit when registering for an event.

Settings

Availability

Members ▾

Limit to Memberships ⓘ

▾

This feature is designed for Members only.

☐ Is Displayed For Non-Members ⓘ

Fee Item *

Golf Benefit ▾

Price

199

Benefit Items

✕ Golf Benefit 100%, ▾

Cancel   Done

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Tracking Benefit Usage

Event type benefits will automatically be tracked by tying the benefit item to an event registration.

Custom benefits such as banner ads, use of conference room etc. will need to be manually tracked.

☑ Benefit Tracking 1

Name	Used	Remaining	
Golf Benefit 100%	0	1	📋 ✓

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Adjust Membership Benefits

At times you may wish to add or remove benefits from a contact.

For example, perhaps an event has been cancelled and you wish to remove that benefit and add a new benefit. These adjustment can either be made individually or in bulk.

☑ Benefit Tracking 2

Name	Used	Remaining		
Annual Gala Ticket	1	1	▤	✓
Monthly Networking Pass	3	9	▤	✓

Communicate Benefit Usage to Contacts

Over time you will want to notify benefit owners of the benefits that their membership provided, how many they have used and what is remaining. This can be done individually or in bulk.

Benefit Tracking 2			
Name	Used	Remaining	
Annual Gala Ticket	1	1	
Monthly Networking Pass	3	9	

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Benefit Reports

Benefit History Report: Benefit Item History report provides a detailed way to look at every transaction that has happened with a contact.

Benefit Usage Report: provides a list of those members who have used benefits (and which benefits) over a selected date range. You can filter it to a specific benefit item or category. This can be useful in analyzing which benefits your members use most.

Benefit Tracking FAQ's

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Questions