

Setting up Your Membership Types

Overview of Membership

Membership Global Settings

How to create Membership Types

Add Pricing to a Membership Type

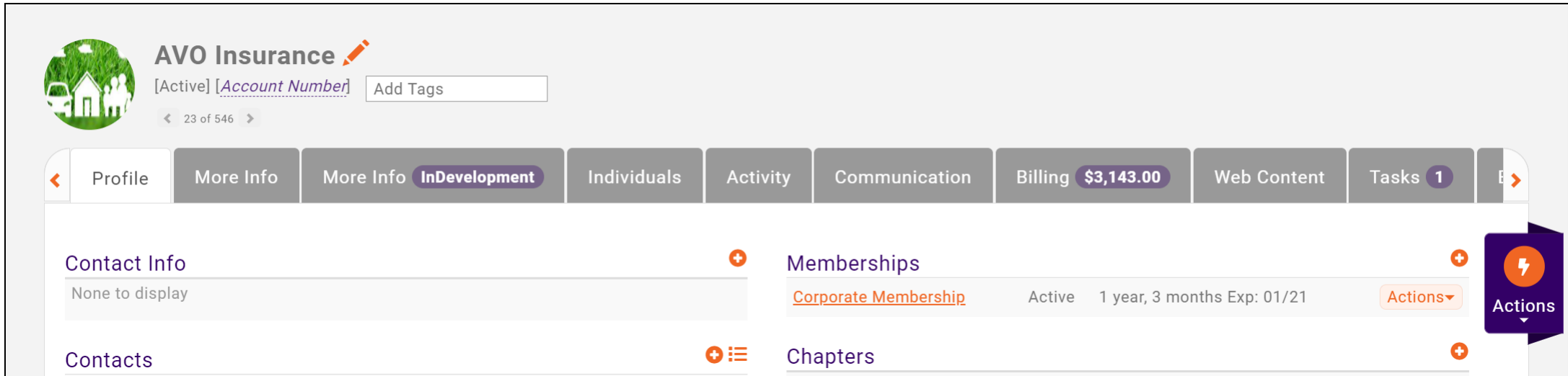
Add Levels to a Membership Type


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






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** 

Contacts  

Chapters 

Actions 

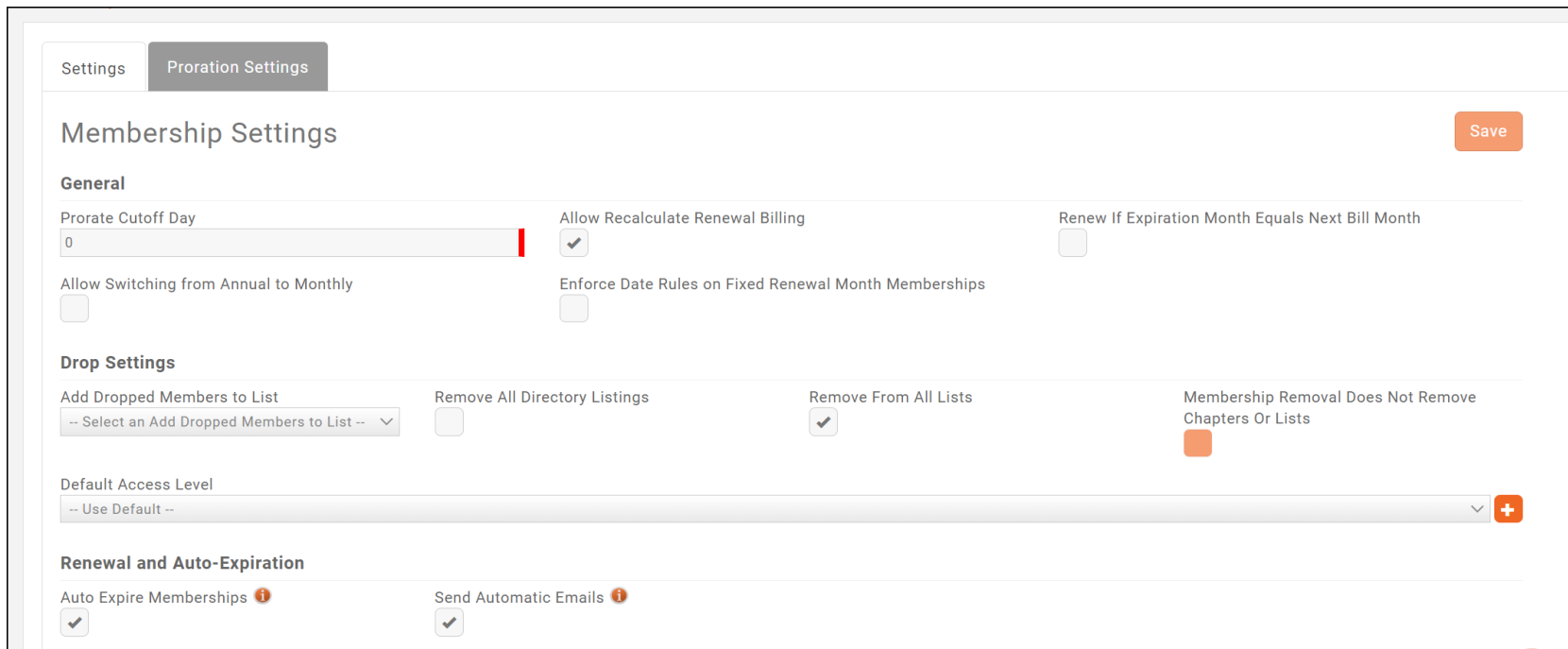
As you think about your membership structure...



- ✓ 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 wish pricing to be automatically recalculated?
- ✓ Do you wish to pro-rate dues?
- ✓ Do your memberships have levels?

Global Membership Settings

Several global settings may be 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 'Global Membership Settings' interface. At the top, there are two tabs: 'Settings' and 'Proration Settings', with 'Proration Settings' currently selected. The main heading is 'Membership Settings', and a 'Save' button is located in the top right corner. The settings are organized into several sections:

- General**
 - Prorate Cutoff Day:** A numeric input field set to '0'.
 - Allow Recalculate Renewal Billing:** A checked checkbox.
 - Renew If Expiration Month Equals Next Bill Month:** An unchecked checkbox.
 - Allow Switching from Annual to Monthly:** An unchecked checkbox.
 - Enforce Date Rules on Fixed Renewal Month Memberships:** An unchecked checkbox.
- Drop Settings**
 - Add Dropped Members to List:** A dropdown menu showing '-- Select an Add Dropped Members to List --'.
 - Remove All Directory Listings:** An unchecked checkbox.
 - Remove From All Lists:** A checked checkbox.
 - Membership Removal Does Not Remove Chapters Or Lists:** An unchecked checkbox.
- Default Access Level:** A dropdown menu showing '-- Use Default --' with a '+' icon to the right.
- Renewal and Auto-Expiration**
 - Auto Expire Memberships:** A checked checkbox.
 - Send Automatic Emails:** A checked checkbox.

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... Show only... Customize Results... + 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

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

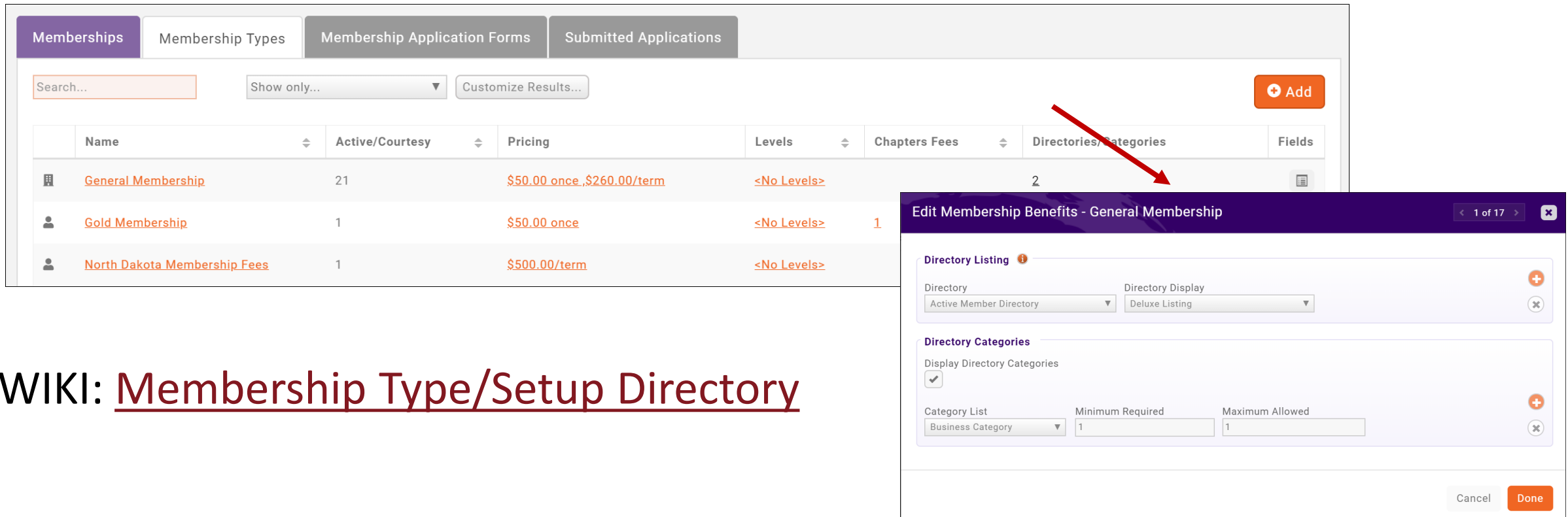
Best Macaroons ever

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](#)

Membership Custom Fields...

Custom Fields allow you to gather additional information about the member. You can create new custom fields or use existing custom fields

KB: [Custom Fields](#)

Edit Membership Fields - Agency Membership

Membership Type Setting Fields

Name	Display	Require
Membership Type	✓	✓
Prefix (i.e. Mr. Mrs. Dr.)		
First Name	✓	✓
Last Name	✓	✓
Suffix (i.e Jr. Sr. III)		
Email	✓	✓
Designations		
NAICS Code		
SIC Code		
Individual Mailing Address	✓	
Individual Address Country	✓	
Individual Phone (Main)	✓	

Questions?