

Managing your Memberships

Agenda

- Review Membership Settings
- Review of Membership Type Setup
- Membership Application
- Managing Memberships
 - Approving Membership Applications
 - Adding
 - Upgrading
 - Downgrading
 - Dropping Memberships

Membership Types

Global membership settings are configured to allow for and drive processes in your database.

KB: [Global Membership Settings](#)

Membership Settings MASS DROP MEMBERSHIPS... SAVE

General

Prorate Cutoff Day Membership Application Version [Ⓞ]

Miscellaneous Options











- Allow Recalculate Renewal Billing
- Allow Switching from Annual to Monthly
- Allow Multiple Membership Purchases on Member Application (v2 Only) [Ⓞ]
- Renew If Expiration Month Equals Next Bill Month
- Enforce Date Rules on Fixed Renewal Month Memberships
- Enable Payment Plan

Need Help?

Membership Types

Initial Considerations in setting up your membership types:

- Term
- Renewal Options
- Pricing
- Directory Listing


Membership Types								ADD		
Search...								Q	⚡	⌵
Name	Active/Courtesy	Pricing	Levels	Benefit	Chapters Fee Items	Directories/Categories	Actions			
 General Membership	14	\$1,250.00 once , \$1,250.00/term	2	5	0	1 Directory / 1 Category				
 Gold Membership	0	\$50.00 once	<No Levels>	<No Benefit>	2	1 Directory / 1 Category				
 North Dakota Membership Fees	0	\$500.00/term	<No Levels>	<No Benefit>	0	1 Category				
 Platinum Membership	10	\$50.00 once , \$1,350.00/term	2	1	0	1 Category				
 Individual Affiliate Membership	21	\$100.00/term	<No Levels>	<No Benefit>	0	1 Directory / 1 Category				

Membership Application

The right application can make a huge difference in convincing interested individuals to sign up.

KB: [View/Create Membership Application Form](#)

Earth Association Membership Application



Earth Association

Instructions

Joining the Earth Association is a great way to get your business connected – whether that's with other businesses, community leaders or elected officials. Earth Association members have the benefit of an efficient networking group in addition to numerous profitable services. Learn more by reviewing the member benefits or clicking on the links below. If you would like to experience the business rewards & development we offer, we invite you to complete the membership application below.

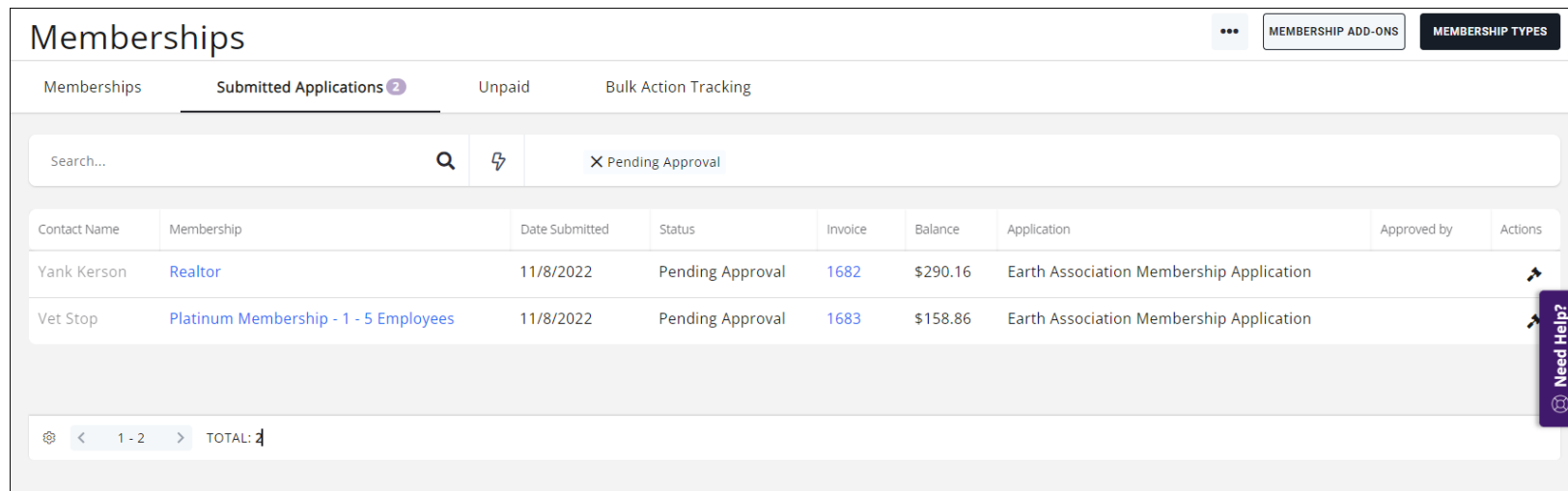
"I originally joined in the Earth Association as a way to get to know key businesses in the community. I have stayed engaged because those connections help me to succeed in my business."

~ Lana Jones, Chairman of the Board of Directors

Manage On-line Application Submission

When notified that an new online application has been submitted you will review and approve applications via Membership > Submitted Applications

KB: [Approving Membership On-line Applications](#)



The screenshot displays the 'Memberships' section of a software interface. At the top, there are tabs for 'Memberships', 'Submitted Applications' (which is active and has a notification badge), 'Unpaid', and 'Bulk Action Tracking'. To the right, there are buttons for 'MEMBERSHIP ADD-ONS' and 'MEMBERSHIP TYPES'. Below the tabs is a search bar with a magnifying glass icon and a lightning bolt icon, and a filter for 'X Pending Approval'. The main area contains a table with the following columns: Contact Name, Membership, Date Submitted, Status, Invoice, Balance, Application, Approved by, and Actions. Two rows of data are visible, both with a status of 'Pending Approval' and a date of '11/8/2022'. A 'Need Help?' button is located on the right side of the table. At the bottom, there is a pagination control showing '1 - 2' and 'TOTAL: 2'.


Contact Name	Membership	Date Submitted	Status	Invoice	Balance	Application	Approved by	Actions
Yank Kerson	Realtor	11/8/2022	Pending Approval	1682	\$290.16	Earth Association Membership Application		
Vet Stop	Platinum Membership - 1 - 5 Employees	11/8/2022	Pending Approval	1683	\$158.86	Earth Association Membership Application		


Manage On-line Application Submission

Staff members who wish to receive an email when an application is submitted should subscribe to the “Membership Application Submitted” email

KB: [Subscribe to Automated Staff Notifications](#)

Application Completed for Mason Insurance

 Cheri's Sandboxes -- INTERNAL <info@growthzoneapp.com>
To: Cheri Petterson

 [Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Mason Insurance has applied for a Large Corporate 2021 (\$31.25) to Cheri's Sandboxes -- INTERNAL

To view and/or approve the membership [click here](#) or copy this address to your browser <https://growthzoneapp.com/a#/ContactInfo/8371318/Profile>

Payment Type: Invoice

Payment Amount: 31.25

Individual Information	
Name	Benny Mason
Email Address	mason@mailinator.com

Organization Information	
Name	Mason Insurance

Manage On-line Application Submission

- **Approve Application:** The applicant's membership will be activated
- **Decline and Keep Contact Info:** This option will add the contact to your database as a non-member. Use this option in cases where, perhaps, the applicant has chosen the wrong membership type
- **Delete:** This option will delete the contact and the membership from your database

Add a Membership to a Contact

- Memberships may also be added on a contact's profile tab in the back office
- KB: [Add a Membership to a Contact](#)

Add Membership 🔍 ✕

Details

Organization/Individual* Wick's Candle Shop 🔍 Type* ▼ Level ▼ Term [Ⓜ] 0

Chapter ▼ Courtesy

Sales Rep ▼ + Join Reason ▼ + Referred By Contact 🔍 +

Override ▼ Initial Membership Status Active ▼

Add a Membership to a Contact

After adding the Membership:

- Accept payment for the invoice OR deliver the invoice
- Validate that the Scheduled Billing is setup appropriately
- (Optional) Verify that Directory is assigned to the member
- (Optional) Add to Lists/Committees

Add a Membership to a Contact

Deliver invoice or accept payment



The screenshot shows a software interface for managing contact information. The top navigation bar includes a search field, a user profile for Cheri Petterson, and an 'EDIT ORGANIZATION' button. The main content area is titled 'Wick's Candle Shop' and has a tabbed interface with 'Billing' selected. Below the tabs is a search bar and a filter for 'Show last 18 months: True'. A table displays a single billing record:

Type	Reference Number	Detail	Transaction Date	Amount	Balance	Actions
Invoice	1686	Membership Dues 5_13	11/18/2022	\$390.00	\$390.00	...

A dropdown menu is open over the 'Actions' column of the invoice record, listing several options: Enter Check, Enter Credit Card, Enter Cash, Enter Trade, Enter External Payment, Create Write Off, Create Credit, Download Invoice, and Send Email. The 'Download Invoice' and 'Send Email' options are highlighted with a red rectangular box.

Add a Membership to a Contact


Verify Scheduled Billing: This should reflect the appropriate Membership Type and Next Bill Date

Membership Scheduled Billing 								
Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date	Next Bill Date	End Date
Basic Membership 	Alex Wizard	Annually	\$340.00	\$0.00		11/18/2022	11/18/2023	

Add a Membership to a Contact

If applicable, verify that the member has been assigned to a Member Directory. If you have assigned a directory to the membership type, the directory should automatically be assigned. If not, and applicable, assign member to a directory

KB: [Add a Directory Listing to a Member](#)

Directory Listings +			
Type	Name	Availability	
Standard Listing	Active Member Directory	Public & Info Hub	

Relate Contacts to the Membership

If the membership type has been setup as Full Inheritance, all individuals associated to the contact will be activated. If the membership types is set to "Owner Only" only the organization will be activated.

The screenshot displays a software interface with two main sections: "Memberships" and "Billing".

Memberships Section:

Membership	Status	Length
Basic Membership	Active	today Exp: 11/23

Billing Section:

1 SCHEDULED BILLINGS Next Bill Date: 11/18/2023	\$390.00 BALANCE Voluntary: \$0.00 Credits: \$0.00	0 BILLING NOTES Last Date:	0 STORED PAYMENT PROFILES
---	--	----------------------------------	------------------------------

A dropdown menu is open over the "Basic Membership" row, listing the following actions:

- Upgrade Membership
- Downgrade Membership
- Drop or Delete Membership
- Adjust Membership
- Edit Expiration Dates
- Related Contacts** (highlighted with a red box)

Relate Contacts to the Membership

You can manually adjust which staff members inherit the membership, by selecting the Related Contacts option

KB: [Related Contacts](#)

Edit Related Contacts 🖨️ ✕

Contact Name

Alex Wizard ✕ -

Gloria Wick ✕ -



+

Cancel Done

Parent/Child Membership Inheritance

In a Parent/Child relationship, you have the option to allow the child business to inherit the membership from the parent. Pre-requisite: The relationship type setup must be of type Location.

KB: [Contact Relationship Types](#)

Child Organizations			
Organization	City	Type	
The Boutique		Branch Location	 

Parent Organizations			
No data has been added to this section			

Membership Changes

Manage a contacts membership from their Profile tab

[KB: Manage Membership Changes](#)

The screenshot displays a user interface for managing memberships. At the top, there is a section titled "Memberships" with a plus icon in the top right corner. Below this is a table with the following columns: "Membership", "Status", and "Length". A single row is visible with the following data: "Basic Membership" (a blue link), "Active", and "today Exp: 11/23". To the right of this row is a three-dot menu icon. A dropdown menu is open from this icon, listing the following options: "Upgrade Membership", "Downgrade Membership", "Drop or Delete Membership", "Adjust Membership", "Edit Expiration Dates", and "Related Contacts". Below the table is a "Billing" section with four summary cards: "1 SCHEDULED BILLINGS" (Next Bill Date: 11/18/2023), "\$390.00 BALANCE" (Voluntary: \$0.00 | Credits: \$0.00), "0 BILLING NOTES" (Last Date:), and "0 STORED PAYMENT PROFILES". At the bottom right of the billing section, it says "Tax Exempt: No".

Membership	Status	Length
Basic Membership	Active	today Exp: 11/23

- Upgrade Membership
- Downgrade Membership
- Drop or Delete Membership
- Adjust Membership
- Edit Expiration Dates
- Related Contacts

Billing

1 SCHEDULED BILLINGS Next Bill Date: 11/18/2023	\$390.00 BALANCE Voluntary: \$0.00 Credits: \$0.00	0 BILLING NOTES Last Date:	0 STORED PAYMENT PROFILES
---	--	----------------------------------	------------------------------

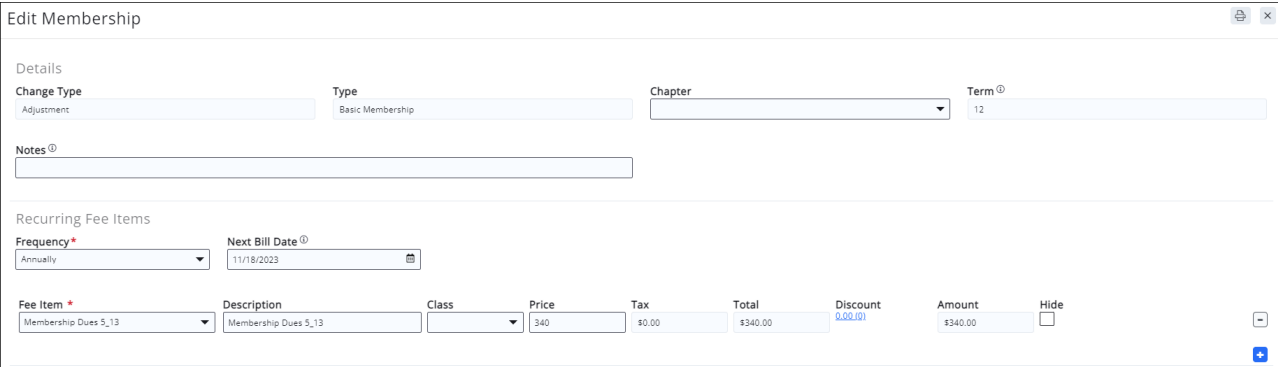
Tax Exempt: No

Adjust Membership

Adjusting a membership allows you to change:

- Pricing
- Frequency
- Invoice Options
- Next Bill Date

KB: [Adjust Membership](#)



The screenshot shows the 'Edit Membership' form with the following fields and values:

- Details:**
 - Change Type: Adjustment
 - Type: Basic Membership
 - Chapter: [Dropdown]
 - Term: 12
 - Notes: [Text Area]
- Recurring Fee Items:**
 - Frequency: Anually
 - Next Bill Date: 11/18/2023
- Table:**

Fee Item *	Description	Class	Price	Tax	Total	Discount	Amount	Hide
Membership Dues 5_13	Membership Dues 5_13	[Dropdown]	340	90.00	9340.00	0.00.00	9340.00	<input type="checkbox"/>

Upgrade a Membership

- When upgrading a membership pay particular attention to the fees and next bill date. Make any changes as needed
- KB: [Upgrade a Membership](#)

Edit Membership 🖨️ ✕

Details

Change Type
Upgrade

Type*
Basic Membership

Level
[Empty]

Term ⓘ
12

Chapter
[Empty]

Staff
[Empty] +

Notes ⓘ
[Empty]

Recurring Fee Items

Downgrade a Membership

- When downgrading a membership pay particular attention to the fees and next bill date. Make any changes as needed
- KB: [Downgrade a Membership](#)

Edit Membership

Details

Change Type: Downgrade

Type*: Basic Membership

Level: [Dropdown]

Term: 12

Chapter: [Dropdown]

Staff: [Dropdown]

Notes: [Text Area]

Recurring Fee Items

Frequency*: Annually

Next Bill Date*: 11/18/2023

Change Effective Date: 11/18/2022

Fee Item *	Description	Class	Price	Tax	Total	Discount	Amount	Hide
Membership Dues 5_13	Membership Dues_5_13	[Dropdown]	340	\$0.00	\$340.00	0.00 (0)	\$340.00	<input type="checkbox"/>

Drop a Membership

KB: [Drop a Membership](#)

Drop or Delete Membership

Membership: Basic Membership Membership Owner: Wick's Candle Shop Action: Drop

End Date: 11/18/2022 Reason: []

Notes: []

Remove All Directory Listings

Open Invoices associated with this Membership will be:

Written Off Left Open

Invoices to Write Off

<input type="checkbox"/>	Invoice Number	Contact Name	Purchase Date	Amount	Balance
<input type="checkbox"/>	1686	Wick's Candle Shop	11/18/2022	\$390.00	\$390.00

Update Access Level for all Contacts

User- None

Name	Access Level	Remove From Lists/Committees
Alex Wizard	User- None	<input checked="" type="checkbox"/>
Gloria Wick	User- None	<input checked="" type="checkbox"/>

Cancel Done

Review Membership Details

Click on the Contact's Membership on the profile tab to display details and history of Membership Activity

The screenshot shows a software interface with a 'Memberships' table and a 'Membership Details' window. A red arrow points to the 'Basic Membership' link in the table. The 'Membership Details' window displays the following information:

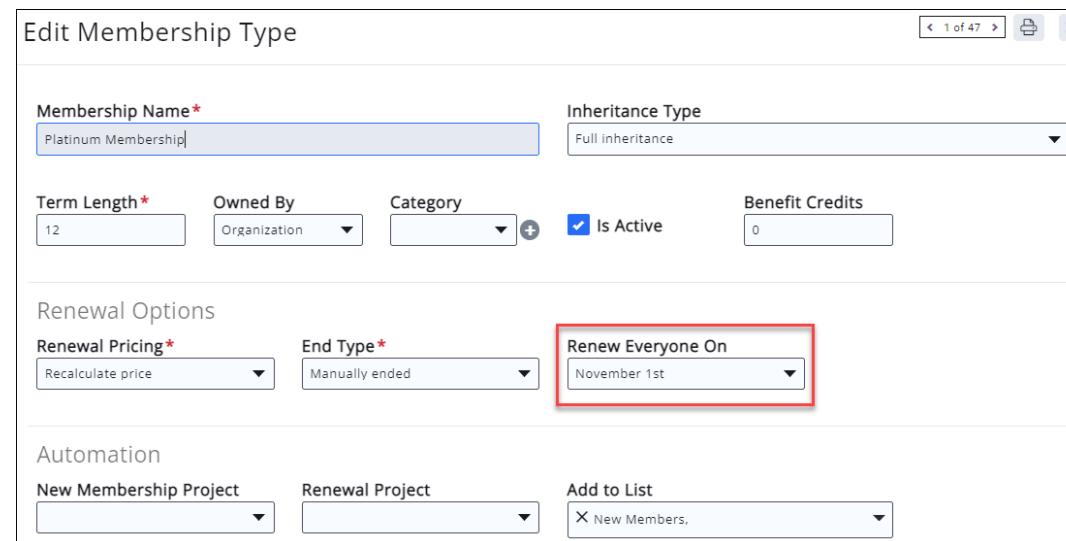
Membership	Status	Membership Category	Membership Number
Basic Membership	Active		165764

Chapter	Join Date	Expiration Date [Ⓢ]	Grace Expiration Date
	11/18/2022	11/17/2023	12/17/2023

Renews In [Ⓢ]	<input type="checkbox"/> Courtesy [Ⓢ]	<input checked="" type="checkbox"/> Primary Membership [Ⓢ]
November		

About Expiration Dates

Expiration dates will automatically be set when a membership is added. Based on the membership type “Renew Everyone” setting and the membership Term, the system will calculate the expiration date



The screenshot shows the 'Edit Membership Type' form with the following fields and values:

- Membership Name***: Platinum Membership
- Inheritance Type**: Full inheritance
- Term Length***: 12
- Owned By**: Organization
- Category**: (empty)
- Is Active**:
- Benefit Credits**: 0
- Renewal Options**
 - Renewal Pricing***: Recalculate price
 - End Type***: Manually ended
 - Renew Everyone On**: November 1st (highlighted with a red box)
- Automation**
 - New Membership Project**: (empty)
 - Renewal Project**: (empty)
 - Add to List**: X New Members.

Edit Expiration Dates

Expiration dates may be edited from a member's profile tab, or under the Memberships module

KB: [Update Expiration Date from Member Profile tab](#)

KB: [Update Expiration Dates from Membership Module](#)

Edit Expiration Dates

NOTE: If the Membership Setting “Enforce Date Rules on Fixed Renewal Month Memberships” is enabled you will not be able to change expiration dates or next bill dates

Miscellaneous Options	
<input checked="" type="checkbox"/>	Allow Recalculate Renewal Billing
<input type="checkbox"/>	Allow Switching from Annual to Monthly
<input checked="" type="checkbox"/>	Allow Multiple Membership Purchases on Member Application (v2 Only)
<input type="checkbox"/>	Renew If Expiration Month Equals Next Bill Month
<input type="checkbox"/>	Enforce Date Rules on Fixed Renewal Month Memberships

Questions?