

# Managing Your Memberships



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

# Membership Types

Initial Considerations in setting up your membership types:

- Individual vs. Business
- Term
- Renewal Options
- Pricing
- Directory Listing

Name Small Business Membership 2021	Term/Length (Months) 12	Owned By Organization	Membership Category ⓘ Corporate	Is Active <input checked="" type="checkbox"/>	Benefit Credits 0
<b>Renewal Options</b>					
Renewal Pricing Do not recalculate price	End Type Automatically Expires	Renewal Type Invoice	Grace Period Days 30	Renew Everyone On January 1st	
<b>Automation</b>					
New Membership Project -- Select a New Membership Project --	Renewal Project -- Select a Renewal Project --	Add to List -- Select an Add to List --			

# Manage On-line Application Submission

Adding an online membership application to your website will make it easy for people to join your association, but importantly make it easy for your staff to activate a new member

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

Memberships

Types

Add-ons

Benefits 

InDevelopment

Application Forms


Submitted Applications 

1

Unpaid

Search...

Pending Approval

Contact Name	Membership	Date Submitted	Status	Invoice	Balance	Application	Approved by	Actions
Daniel's Delicatessen	<a href="#">Corporate Package 2020 - 500001 - 75000</a>	2/8/2021	Pending Approval	<a href="#">820</a>	\$628.90	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	<a href="mailto:mason@mailinator.com">mason@mailinator.com</a>

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

Edit Membership Application - Daniel's Delicatessen

View Application

Data Submitted from Membership Application

Name	Business
Daniel Jones	Daniel's Delicatessen
Email	
danjones@mailinator.com	

Delete

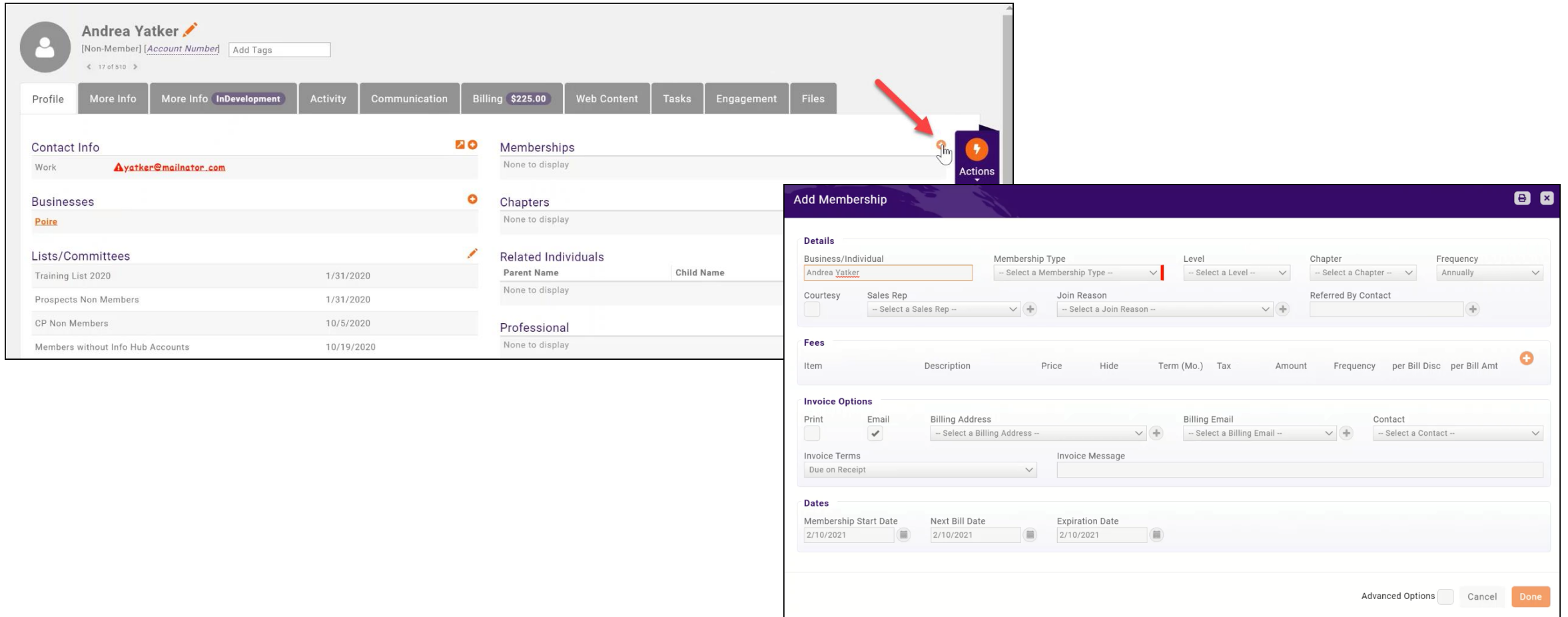
Cancel

Delete and Keep Contact Info

Approve Application

# Add a Membership to a Contact

Memberships may be added to contacts by completion of the membership application form, or you can manually add a membership through the back office



The screenshot displays the GrowthZone back office interface. On the left, a contact profile for Andrea Yatker is shown with tabs for Profile, More Info, More Info (InDevelopment), Activity, Communication, Billing (\$225.00), Web Content, Tasks, Engagement, and Files. A red arrow points to the 'Actions' button in the top right corner of the contact profile. On the right, the 'Add Membership' modal is open, showing various fields for adding a new membership.

**Contact Profile: Andrea Yatker**  
[Non-Member] [Account Number] Add Tags  
< 17 of 510 >

**Profile** More Info More Info **InDevelopment** Activity Communication Billing \$225.00 Web Content Tasks Engagement Files

**Contact Info**  
Work [ayatker@mailinator.com](#)

**Businesses**  
[Poire](#)

**Lists/Committees**

Item	Date
Training List 2020	1/31/2020
Prospects Non Members	1/31/2020
CP Non Members	10/5/2020
Members without Info Hub Accounts	10/19/2020

**Memberships**  
None to display

**Chapters**  
None to display

**Related Individuals**

Parent Name	Child Name
None to display	

**Professional**  
None to display

**Add Membership**

**Details**

Business/Individual:  Membership Type: -- Select a Membership Type -- Level: -- Select a Level -- Chapter: -- Select a Chapter -- Frequency: -- Select a Frequency --

Courtesy: ☐ Sales Rep: -- Select a Sales Rep -- Join Reason: -- Select a Join Reason -- Referred By Contact:

**Fees**

Item	Description	Price	Hide	Term (Mo.)	Tax	Amount	Frequency	per Bill Disc	per Bill Amt
------	-------------	-------	------	------------	-----	--------	-----------	---------------	--------------

**Invoice Options**

Print: ☐ Email: ☒ Billing Address: -- Select a Billing Address -- Billing Email: -- Select a Billing Email -- Contact: -- Select a Contact --

Invoice Terms: Due on Receipt Invoice Message:

**Dates**

Membership Start Date: 2/10/2021 Next Bill Date: 2/10/2021 Expiration Date: 2/10/2021

Advanced Options ☐ Cancel Done

# Add a Membership to a Contact

## KB: Add a Membership to a Contact

Add Membership

Details

Business/Individual

Andrea Yatker

Membership Type

-- Select a Membership Type --

Level

-- Select a Level --

Chapter

-- Select a Chapter --

Frequency

Annually

Courtesy

☐

Sales Rep

-- Select a Sales Rep --

Join Reason

-- Select a Join Reason --

Referred By Contact

Fees

Item	Description	Price	Hide	Term (Mo.)	Tax	Amount	Frequency	per Bill Disc	per Bill Amt
------	-------------	-------	------	------------	-----	--------	-----------	---------------	--------------

Invoice Options

Print

☐

Email

☒

Billing Address

-- Select a Billing Address --

Billing Email

-- Select a Billing Email --

Contact

-- Select a Contact --

Invoice Terms

Due on Receipt

Invoice Message

Dates

Membership Start Date

2/10/2021

Next Bill Date

2/10/2021

Expiration Date

2/10/2021

Advanced Options

☐

Cancel

Done



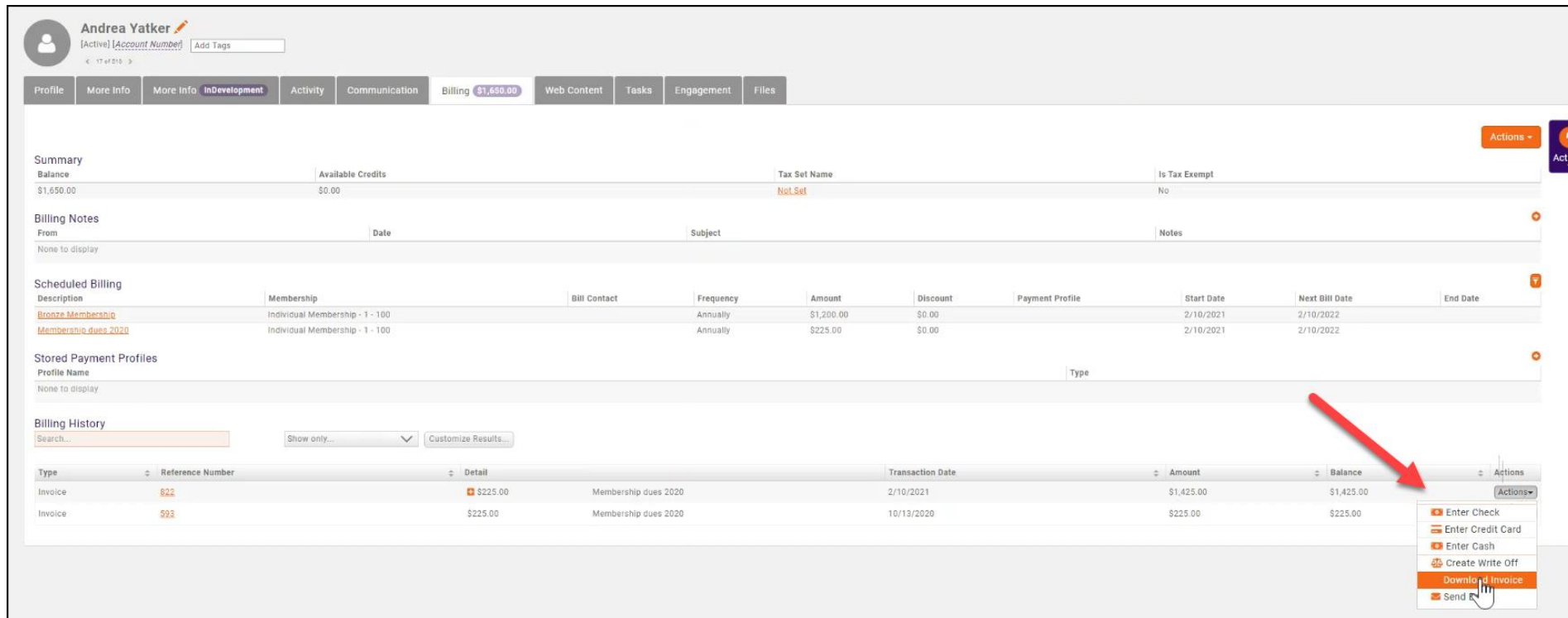
# Add a Membership to a Contact

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

Accept payment for the invoice OR deliver the invoice from the member's billing tab



**Andrea Yatker** [Active] [Account Number] Add Tags

Profile More Info More Info **InDevelopment** Activity Communication **Billing** \$1,650.00 Web Content Tasks Engagement Files

**Summary**

Balance	Available Credits	Tax Set Name	Is Tax Exempt
\$1,650.00	\$0.00	Not Set	No

**Billing Notes**

From	Date	Subject	Notes
None to display			

**Scheduled Billing**

Description	Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date	Next Bill Date	End Date
<a href="#">Bronze Membership</a>	Individual Membership - 1 - 100		Annually	\$1,200.00	\$0.00		2/10/2021	2/10/2022	
<a href="#">Membership dues 2020</a>	Individual Membership - 1 - 100		Annually	\$225.00	\$0.00		2/10/2021	2/10/2022	

**Stored Payment Profiles**

Profile Name	Type
None to display	

**Billing History**

Search... Show only... Customize Results...

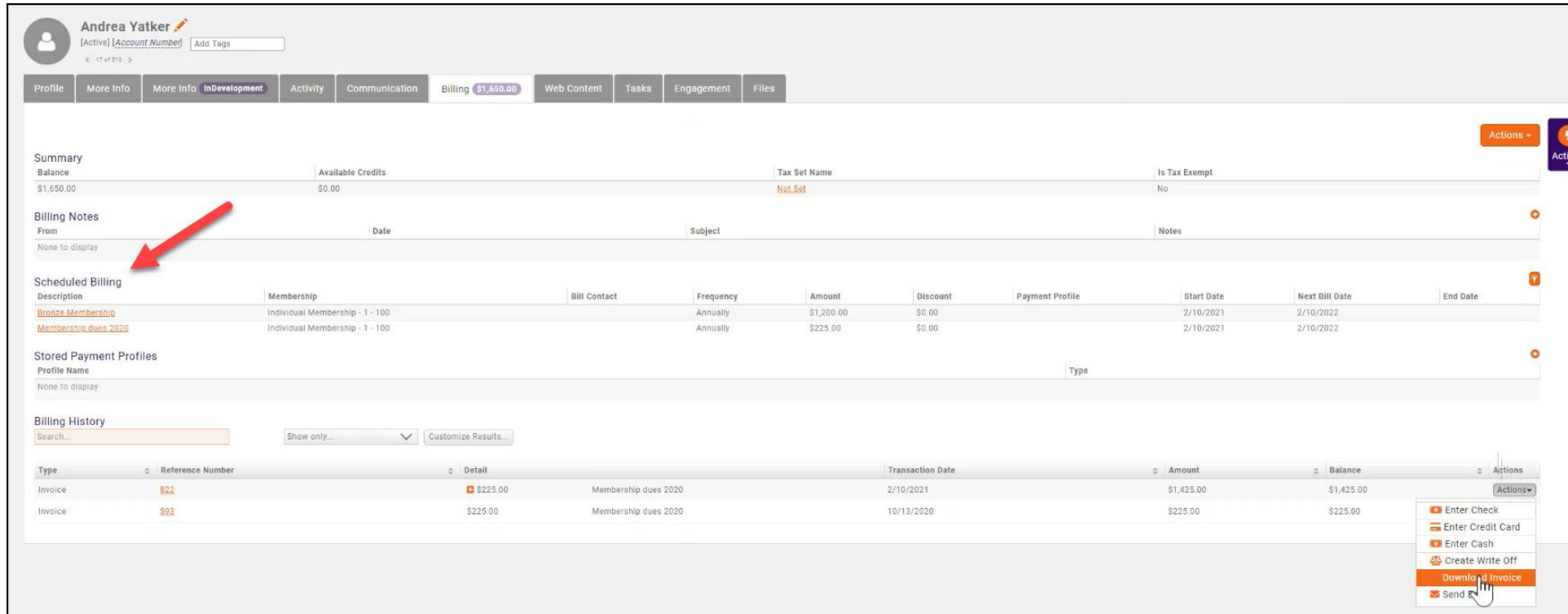
Type	Reference Number	Detail	Transaction Date	Amount	Balance	Actions
Invoice	822	\$225.00 Membership dues 2020	2/10/2021	\$1,425.00	\$1,425.00	Actions
Invoice	593	\$225.00 Membership dues 2020	10/13/2020	\$225.00	\$225.00	Actions

Actions dropdown menu:

- Enter Check
- Enter Credit Card
- Enter Cash
- Create Write Off
- Download Invoice**
- Send Invoice

# Add a Membership to a Contact

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



**Andrea Yatker** [Active] [Account Number] Add Tags

Profile More Info More Info **InDevelopment** Activity Communication **Billing (\$1,650.00)** Web Content Tasks Engagement Files

**Summary**

Balance	Available Credits	Tax Set Name	Is Tax Exempt
\$1,650.00	\$0.00	Not Set	No

**Billing Notes**

From	Date	Subject	Notes
None to display			

**Scheduled Billing**

Description	Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date	Next Bill Date	End Date
Bronze Membership	Individual Membership - 1 - 100		Annually	\$1,200.00	\$0.00		2/10/2021	2/10/2022	
Membership dues 2020	Individual Membership - 1 - 100		Annually	\$225.00	\$0.00		2/10/2021	2/10/2022	

**Stored Payment Profiles**

Profile Name	Type
None to display	

**Billing History**

Search... Show only... Customize Results...

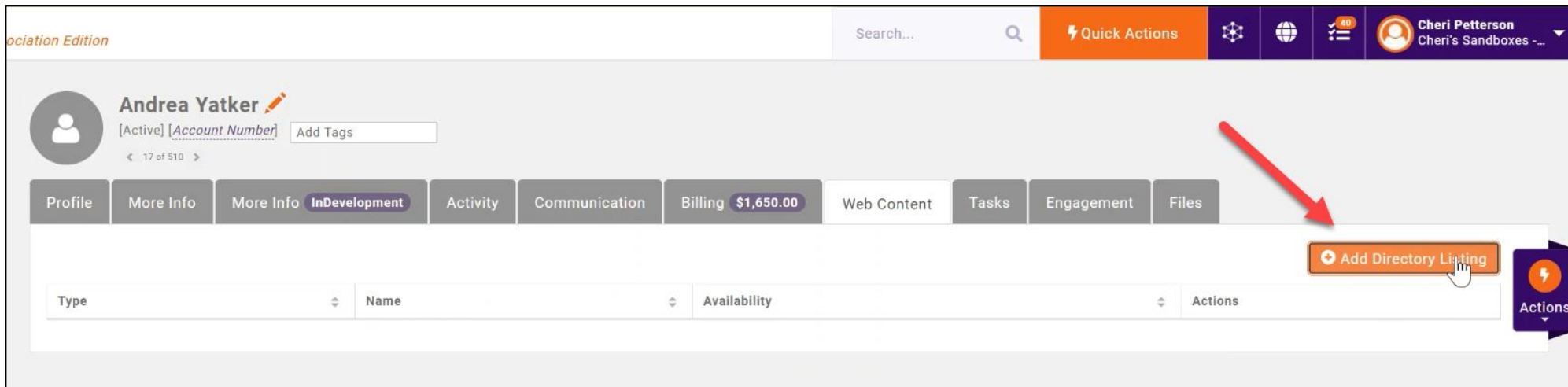
Type	Reference Number	Detail	Transaction Date	Amount	Balance	Actions
Invoice	822	\$225.00 Membership dues 2020	2/10/2021	\$1,425.00	\$1,425.00	Actions
Invoice	993	\$225.00 Membership dues 2020	10/13/2020	\$225.00	\$225.00	Enter Check Enter Credit Card Enter Cash Create Write Off Download Invoice Send

# 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](#)

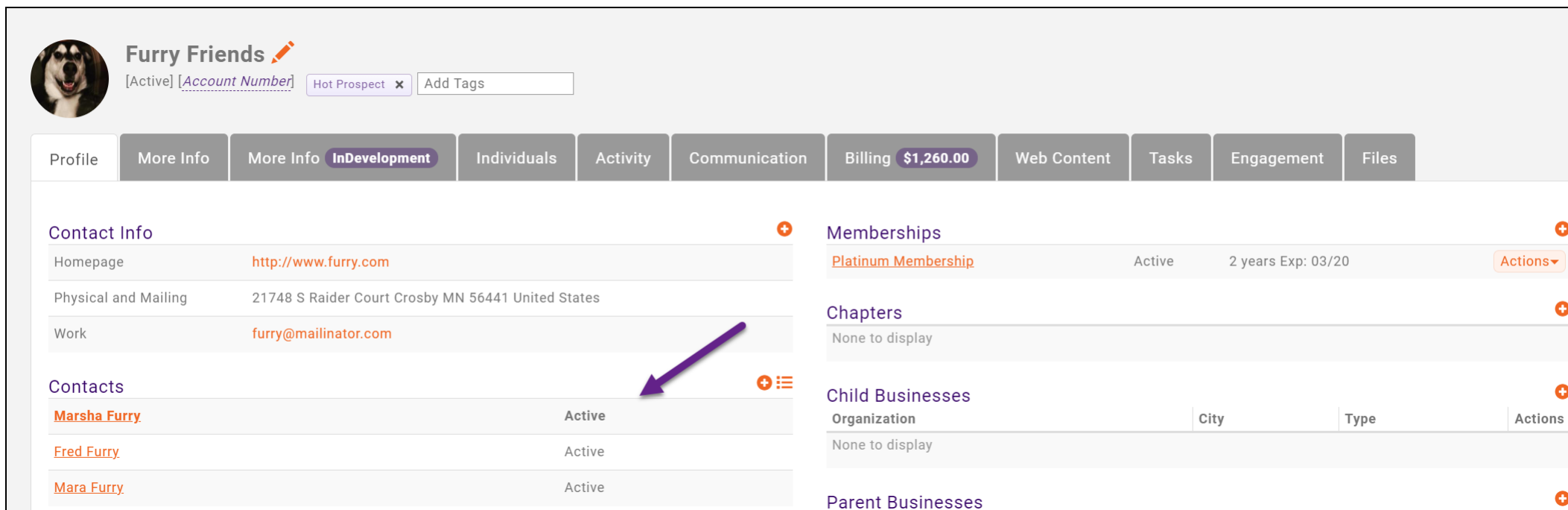


The screenshot displays the GrowthZone user interface for a contact profile. At the top, there is a navigation bar with a search bar, a 'Quick Actions' button, and user information for Cheri Petterson. The main header shows the contact's name 'Andrea Yatker' with a status of '[Active]' and an '[Account Number]' field. Below this is a row of tabs: Profile, More Info, More Info (InDevelopment), Activity, Communication, Billing (\$1,650.00), Web Content, Tasks, Engagement, and Files. A red arrow points to an 'Add Directory Listing' button located below the 'Files' tab. Below the button is a table with columns for Type, Name, Availability, and Actions.


Type	Name	Availability	Actions
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# Manage contact membership relationships


When adding a business membership, all staff members associated to that business will inherit the membership from the business



The screenshot shows the 'Furry Friends' contact profile in the GrowthZone system. The profile includes a photo of a dog, the name 'Furry Friends', and a status of '[Active]'. Below the profile header is a navigation bar with tabs: Profile, More Info, More Info (InDevelopment), Individuals, Activity, Communication, Billing (\$1,260.00), Web Content, Tasks, Engagement, and Files. The 'More Info (InDevelopment)' tab is selected. The main content area is divided into several sections: 'Contact Info' with fields for Homepage, Physical and Mailing, and Work; 'Memberships' showing a 'Platinum Membership' with an 'Active' status and '2 years Exp: 03/20'; 'Chapters' with 'None to display'; 'Child Businesses' with a table showing 'Organization', 'City', 'Type', and 'Actions'; and 'Parent Businesses' with 'None to display'. A purple arrow points to the 'Active' status of the 'Marsha Furry' contact in the 'Contacts' section.

**Furry Friends**   
[Active] [Account Number] Hot Prospect x Add Tags



Profile More Info More Info **InDevelopment** Individuals Activity Communication Billing **\$1,260.00** Web Content Tasks Engagement Files

**Contact Info** 


Homepage <http://www.furry.com>

Physical and Mailing 21748 S Raider Court Crosby MN 56441 United States


Work [furry@mailinator.com](mailto:furry@mailinator.com)

**Contacts**  


<a href="#">Marsha Furry</a>	Active
<a href="#">Fred Furry</a>	Active
<a href="#">Mara Furry</a>	Active

**Memberships** 


<a href="#">Platinum Membership</a>	Active	2 years Exp: 03/20	<a href="#">Actions</a>
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**Chapters** 

None to display

**Child Businesses** 

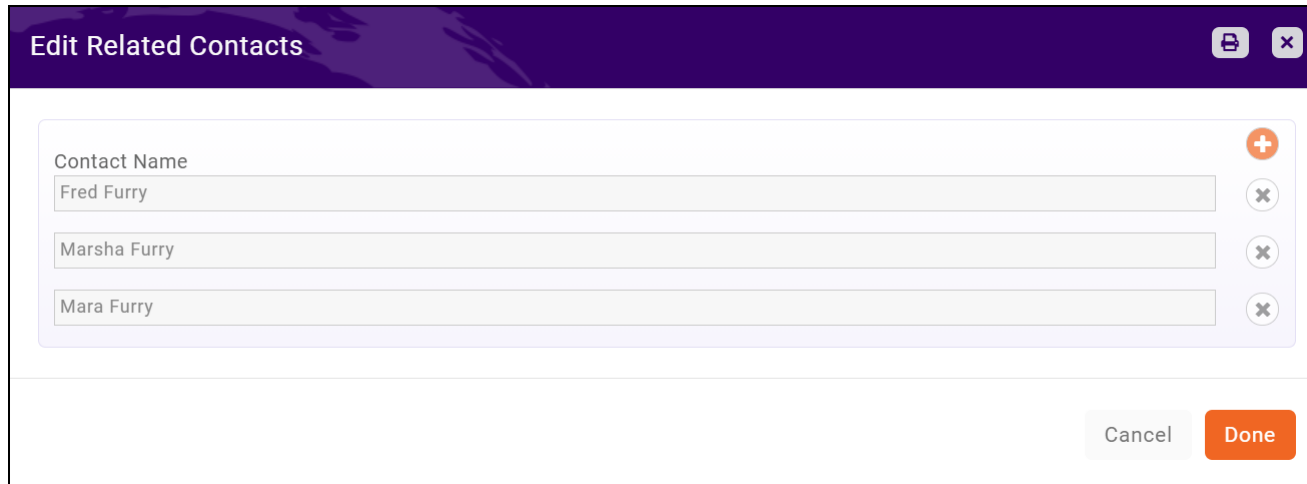
Organization	City	Type	Actions
None to display			

**Parent Businesses** 

# Manage Contact Membership Relationships

You can manually adjust which staff members inherit the membership, by selecting the related contacts option

KB: [Related Contacts](#)



The screenshot shows a dialog box titled "Edit Related Contacts" with a dark purple header bar containing a save icon and a close button. The main area is white and contains a list of contact names in a light gray box. The list has a header "Contact Name" and three entries: "Fred Furry", "Marsha Furry", and "Mara Furry". Each entry has a small "x" icon to its right. To the right of the list is a red "+" icon. At the bottom right of the dialog are "Cancel" and "Done" buttons.

Contact Name
Fred Furry
Marsha Furry
Mara Furry

# Manage Contact Membership Relationships

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.

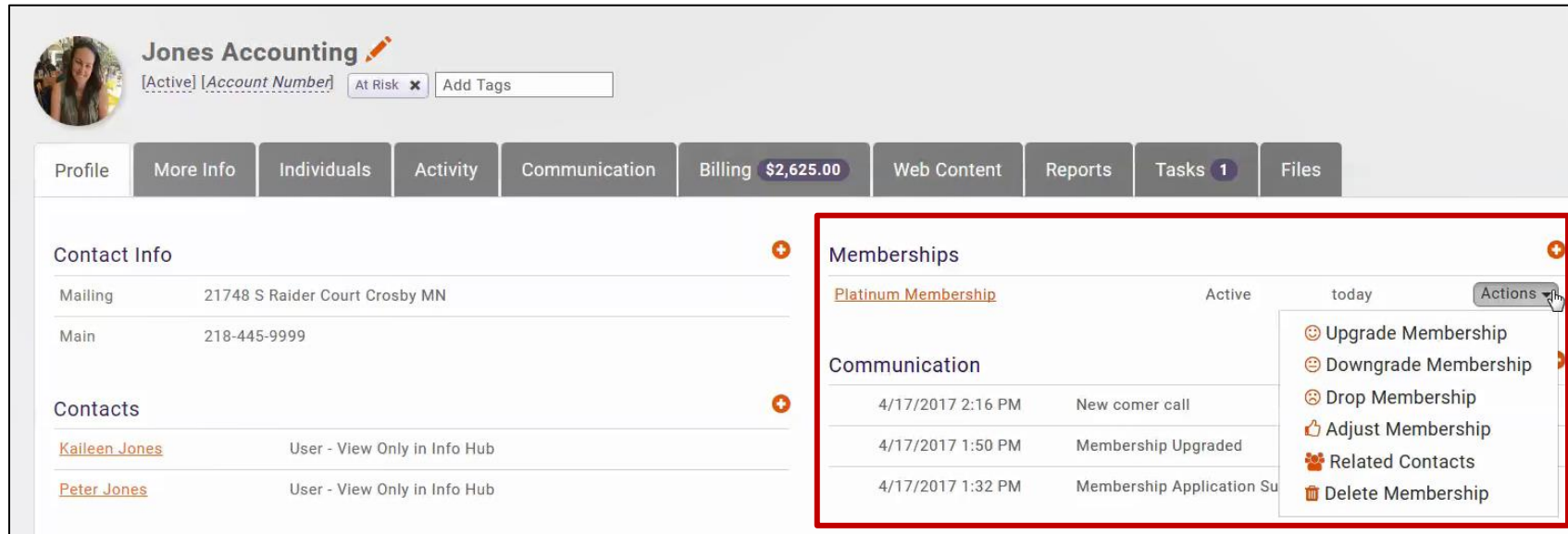
KB: [Contact Relationship Types](#)

Memberships				+
<a href="#">Platinum Membership</a>	Active	2 years Exp: 03/20	Actions	
Chapters				+
None to display				
Child Businesses				+
Organization	City	Type	Actions	
<a href="#">The Garage</a>		Branch		
Parent Businesses				+
Organization	City	Type	Actions	
None to display				

# Membership Changes

## KB: Manage Membership Changes

- Manage a contacts membership from their Profile tab



The screenshot displays the profile of "Jones Accounting". The interface includes a header with a profile picture, name, and status (Active). Below the header is a navigation bar with tabs: Profile, More Info, Individuals, Activity, Communication, Billing (\$2,625.00), Web Content, Reports, Tasks (1), and Files. The main content area is divided into sections: Contact Info, Contacts, Memberships, and Communication. The Memberships section is highlighted with a red box, showing a table with columns for Membership, Status, and Date. An "Actions" dropdown menu is open, listing options: Upgrade Membership, Downgrade Membership, Drop Membership, Adjust Membership, Related Contacts, and Delete Membership.

Membership	Status	Date
Platinum Membership	Active	today

Date	Event
4/17/2017 2:16 PM	New comer call
4/17/2017 1:50 PM	Membership Upgraded
4/17/2017 1:32 PM	Membership Application Su

- Upgrade Membership
- Downgrade Membership
- Drop Membership
- Adjust Membership
- Related Contacts
- Delete Membership

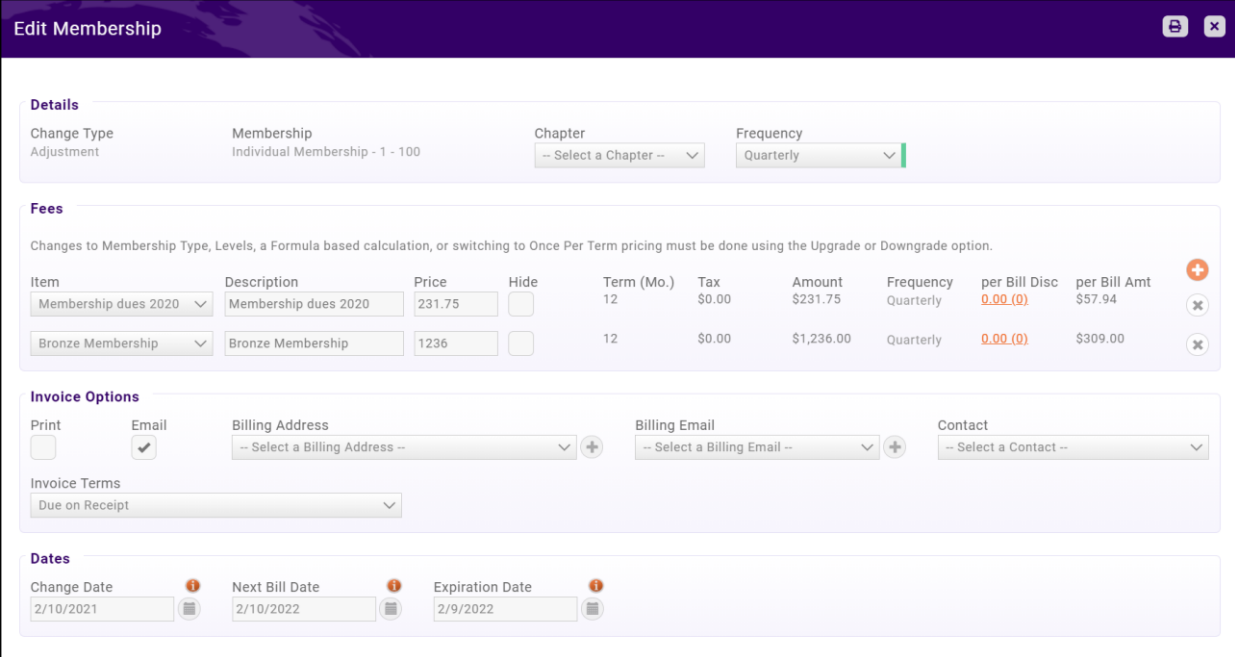


# Adjust Membership

Adjusting a membership allows you to change:

- Pricing
- Frequency
- Invoice Options
- Next Bill Date/Expiration Date

KB: [Adjust Membership](#)



**Edit Membership**

**Details**

Change Type: Adjustment  
Membership: Individual Membership - 1 - 100  
Chapter: -- Select a Chapter --  
Frequency: Quarterly

**Fees**

Changes to Membership Type, Levels, a Formula based calculation, or switching to Once Per Term pricing must be done using the Upgrade or Downgrade option.

Item	Description	Price	Hide	Term (Mo.)	Tax	Amount	Frequency	per Bill Disc	per Bill Amt
Membership dues 2020	Membership dues 2020	231.75	<input type="checkbox"/>	12	\$0.00	\$231.75	Quarterly	0.00 (0)	\$57.94
Bronze Membership	Bronze Membership	1236	<input type="checkbox"/>	12	\$0.00	\$1,236.00	Quarterly	0.00 (0)	\$309.00

**Invoice Options**

Print: ☐ Email: ☒  
Billing Address: -- Select a Billing Address --  
Billing Email: -- Select a Billing Email --  
Contact: -- Select a Contact --  
Invoice Terms: Due on Receipt

**Dates**

Change Date: 2/10/2021  
Next Bill Date: 2/10/2022  
Expiration Date: 2/9/2022

# Upgrade a Membership

## KB: Upgrade a Membership

**Edit Membership**

**Details**

Change Type  
Upgrade

Membership Type  
Individual Membership




Level  
1 - 100

Chapter  
-- Select a Chapter --

Frequency  
Annually

Staff  
Cheri Petterson


**Fees**


Item	Description	Price	Hide	Term (Mo.)	Tax	Amount	Frequency	per Bill Disc	per Bill Amt	
Membership dues 2020	Membership dues 2020	225	<input type="checkbox"/>	12	\$0.00	\$225.00	Annually	0.00 (0)	\$225.00	 
Bronze Membership	Bronze Membership	1200	<input type="checkbox"/>	12	\$0.00	\$1,200.00	Annually	0.00 (0)	\$1,200.00	


**Invoice Options**

Print  
☐

Email  
☒

Billing Address  
-- Select a Billing Address --  



Billing Email  
-- Select a Billing Email --  



Contact  
-- Select a Contact --  



Invoice Terms  
Due on Receipt

Invoice Message

**Dates**

Change Date  
2/10/2021  


Next Bill Date  
2/10/2022  


Expiration Date  
2/9/2022  


Cancel

Done

# Downgrade a Membership

## KB: Downgrade a Membership

Edit Membership

Details

Change Type  
Downgrade

Membership Type  
Individual Membership

Level  
1 - 100

Chapter  
-- Select a Chapter --

Frequency  
Annually

Staff  
Cheri Petterson

Fees

Item	Description	Price	Hide	Term (Mo.)	Tax	Amount	Frequency	per Bill Disc	per Bill Amt
Membership dues 2020	Membership dues 2020	225	<input type="checkbox"/>	12	\$0.00	\$225.00	Annually	0.00 (0)	\$225.00
Bronze Membership	Bronze Membership	1200	<input type="checkbox"/>	12	\$0.00	\$1,200.00	Annually	0.00 (0)	\$1,200.00

Invoice Options

Print  
☐

Email  
☒

Billing Address  
-- Select a Billing Address --

Billing Email  
-- Select a Billing Email --

Contact  
-- Select a Contact --

Invoice Terms  
Due on Receipt

Invoice Message

Dates

Change Date  
2/10/2021

Next Bill Date  
2/10/2022

Expiration Date  
2/9/2022

Cancel

Done

# Drop a Membership

## KB: Drop a Membership

Drop or Delete Membership

Membership

Individual Membership - 1 - 100

Membership Owner

Andrea Yatker

Action

Drop

End Date

2/10/2021

Reason

-- Select a Reason --

Access Level

User- None

Notes

Remove All Directory Listings

Remove From Lists/Committees

Open Invoices will be

Written Off

Left Open

Invoices to Write Off

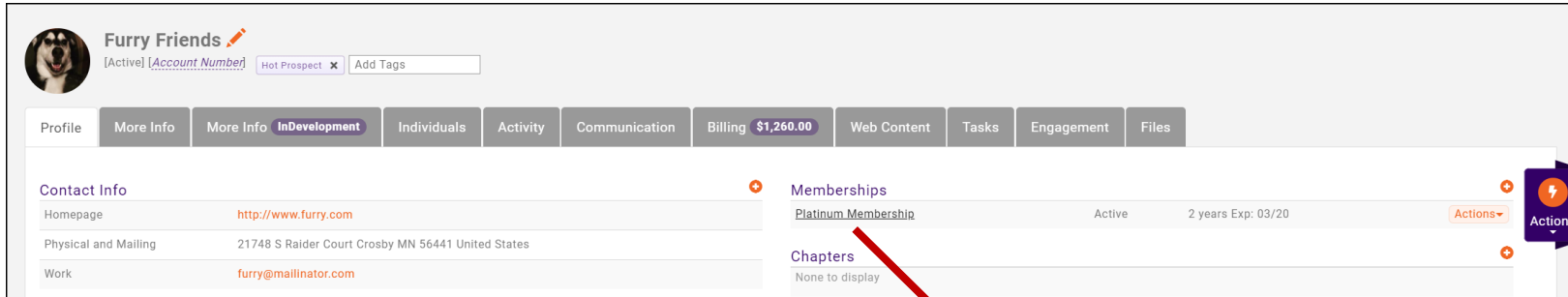
	Invoice Number	Contact Name	Purchase Date	Amount	Balance
<input type="checkbox"/>	822	Andrea Yatker	2/10/2021	\$1,425.00	\$1,425.00


Cancel

Done

# Review Membership Details

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



**Furry Friends**   
[Active] [Account Number] Hot Prospect x Add Tags

Profile More Info More Info **InDevelopment** Individuals Activity Communication Billing **\$1,260.00** Web Content Tasks Engagement Files

**Contact Info**

Homepage	<a href="http://www.furry.com">http://www.furry.com</a>
Physical and Mailing	21748 S Raider Court Crosby MN 56441 United States
Work	<a href="mailto:furry@mailinator.com">furry@mailinator.com</a>

**Memberships**

<a href="#">Platinum Membership</a>	Active	2 years Exp: 03/20	Actions
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**Chapters**

None to display

**Membership Activity**

This section shows the activity/history that has occurred with this membership. The first Activity Type recorded is called "New". An additional Activity Type entry will display each time an Upgrade, Downgrade, Adjust, Reactivate, Drop, or Renewal occurs. Each Activity Item has it's own start, expiration and end date.

Membership Type	Activity Type	Last Invoice #	Balance	Start Date	Expiration Date	End Date	Actions
<a href="#">Platinum Membership</a>	New	<a href="#">279</a>	\$0.00	2/7/2019	6/30/2019		Actions
<a href="#">Platinum Membership</a>	Renewal	<a href="#">336</a>	\$600.00	7/1/2020	3/1/2020		Actions
<a href="#">Platinum Membership</a>	Renewal	<a href="#">518</a>	\$650.00	11/1/2020	10/31/2021		Actions

Questions?