

# Setting Up Your Membership Types and On-line Application Form

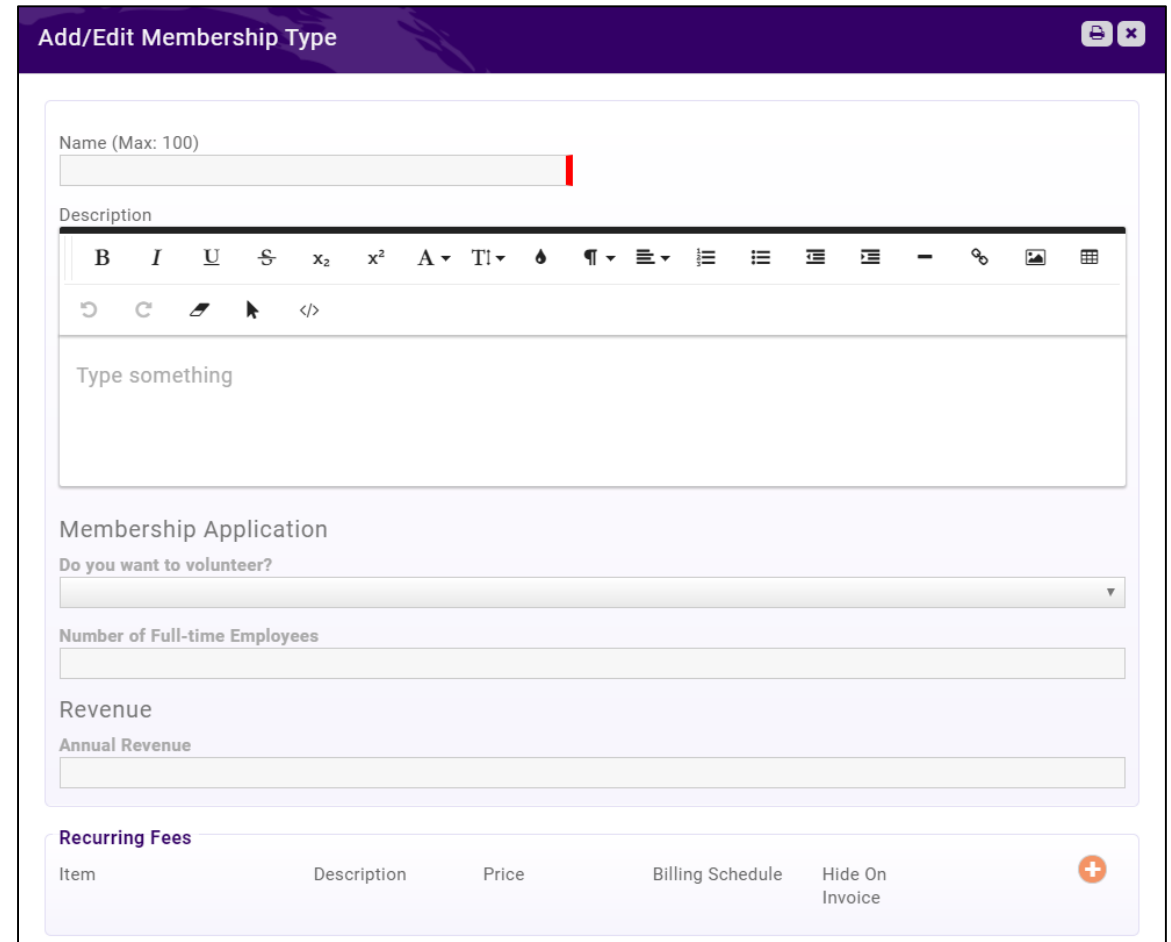
Cheri Petterson

# Agenda

- How to create Membership Types
  - Membership Policies
  - Directory Listing Types
- Review Membership Application Form Settings & Options
- Accept Online Membership Application Form

# Add/Edit Membership Type

- Basic Setup
  - Name/Description
  - Custom Fields
  - Recurring Fees
  - One Time Fees
- WIKI: [Adding a New Membership Type](#)

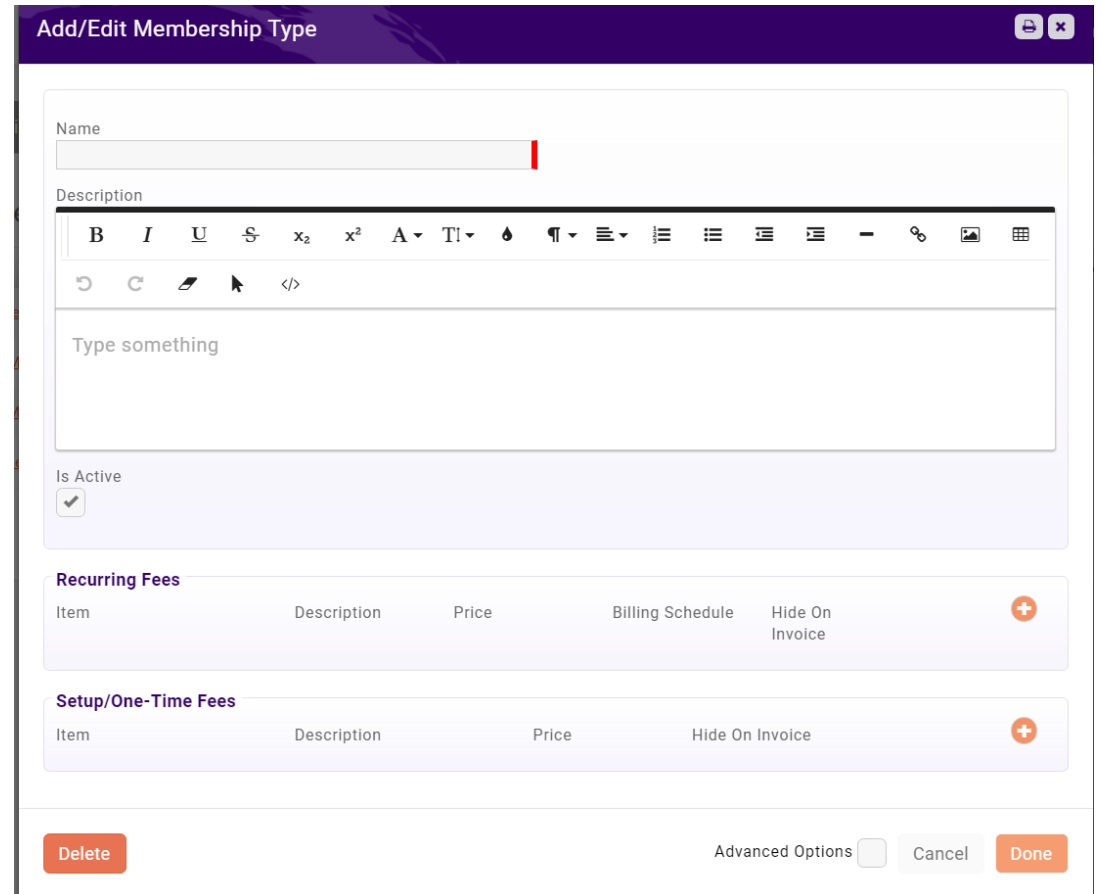


The screenshot shows the 'Add/Edit Membership Type' form. It includes a title bar with the text 'Add/Edit Membership Type' and window control icons. The form is divided into several sections:

- Name (Max: 100)**: A text input field with a red cursor at the end.
- Description**: A rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), subscript (x<sub>2</sub>), superscript (x<sup>2</sup>), text color (A), background color (T), link, unlink, bulleted list, numbered list, indent, outdent, decrease indent, increase indent, link, unlink, and table. Below the toolbar is a text area with the placeholder text 'Type something'.
- Membership Application**: A section with a dropdown menu labeled 'Do you want to volunteer?' and a text input field labeled 'Number of Full-time Employees'.
- Revenue**: A section with a text input field labeled 'Annual Revenue'.
- Recurring Fees**: A table with columns for 'Item', 'Description', 'Price', 'Billing Schedule', and 'Hide On Invoice'. A red plus icon is in the bottom right corner of the table area.

# Create Membership Type

- Basic Options
  - Enter Name of Membership
  - Description – appears on online form to help applicants select the right membership fit
  - Add Recurring and One-Time fee



The screenshot shows the 'Add/Edit Membership Type' form. It includes a 'Name' text field, a 'Description' rich text editor with a toolbar (bold, italic, underline, strikethrough, subscript, superscript, font color, text color, bulleted list, numbered list, link, unlink, indent, outdent, undo, redo, source code, help, and close), and an 'Is Active' checkbox which is checked. Below these are two sections for adding fees: 'Recurring Fees' and 'Setup/One-Time Fees'. Each section contains a table with columns for 'Item', 'Description', 'Price', and 'Billing Schedule' (for recurring) or 'Hide On Invoice' (for one-time), and a '+' button to add a new row. At the bottom, there are 'Delete', 'Advanced Options' (checkbox), 'Cancel', and 'Done' buttons.

Recurring Fees				
Item	Description	Price	Billing Schedule	Hide On Invoice

Setup/One-Time Fees			
Item	Description	Price	Hide On Invoice

# Create Membership Type – Advanced Options

- Select the Advanced Options to further customize the Membership Type
  - Renewal Options – provides methods for managing your renewals

Duration (Months)

12

Active Until

When No Longer Renewing

#### Activation and Renewal

Grace Period Days

0

Renewal Notice Days

7

Don't Activate Membership  
Until First Time Payment

#### Universal Renewal




Renew Everyone In

-- No Choice --

Prorate Partial Years

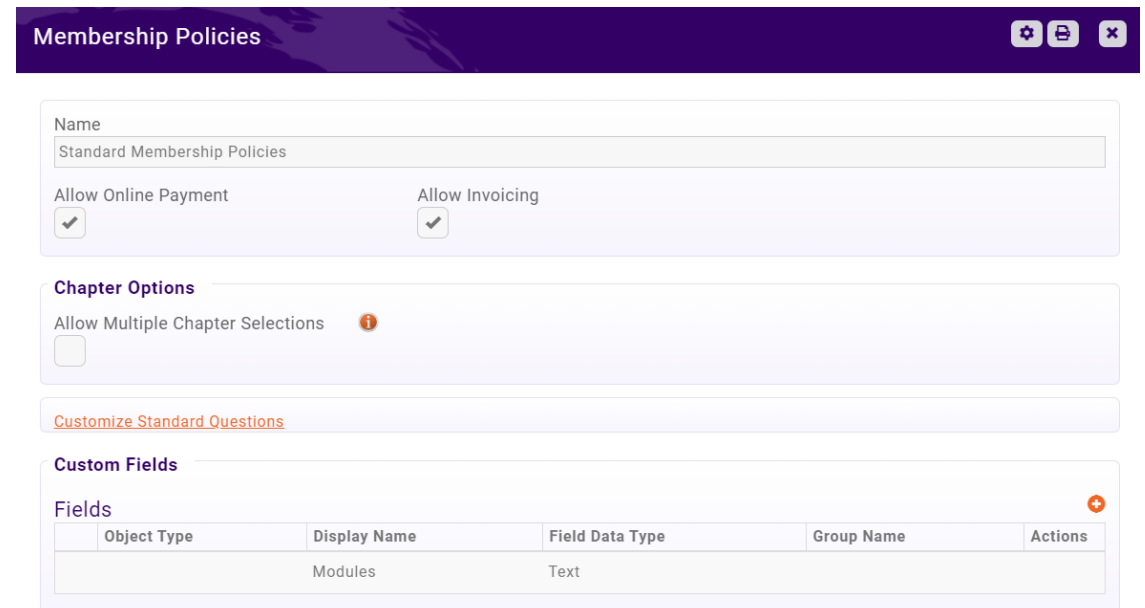
# Create Membership Type – Advanced Options

- Select the Advanced Options to further customize the Membership Type
  - Membership Policies

Is Active <input checked="" type="checkbox"/>	Membership Policies Standard Membership ▼ 	Invoice Template -- select a Invoice Templat ▼	Payment Terms -- select a Payment Te ▼ 
Terms/Conditions -- select a Terms/Con ▼ 			

# Create Membership Type – Advanced Options

- [WIKI: Membership Policies](#)
  - Membership policies allow you to define what information you will gather on the Membership Application form
  - **Standard Membership Policies** are setup by default on installation of the GrowthZone database. You may use the default as it is designed, modify the default, or create a new set of membership policies



Membership Policies

Name  
Standard Membership Policies

Allow Online Payment  Allow Invoicing

**Chapter Options**

Allow Multiple Chapter Selections

[Customize Standard Questions](#)

**Custom Fields**

Fields

Object Type	Display Name	Field Data Type	Group Name	Actions
	Modules	Text		

# Create Membership Type – Advanced Options

- [WIKI: Directory Listings](#)
  - You system will contain a default directory, **Active Member Directory**
  - Directory Listing Types allow you to configure what information will be included about a member in the Directory

### Directory Display Settings

Name

Description

Rank/Priority Placement

**Show Individual Details**

Prefix <input type="checkbox"/>	First Name <input type="checkbox"/>	Middle Initial <input type="checkbox"/>	Last Name <input type="checkbox"/>
Common Name <input type="checkbox"/>	Suffix <input type="checkbox"/>		

**Show Contact Details**

Address <input type="checkbox"/>	City <input type="checkbox"/>	State/Province <input type="checkbox"/>	Postal Code <input type="checkbox"/>
Country <input type="checkbox"/>	Phone <input type="checkbox"/>	Email <input type="checkbox"/>	Website <input type="checkbox"/>



# Membership Application Form

- [WIKI: Setting up the Application](#)
- A default application form is setup in your system. You may use it as it is configured, you customize to better meet your needs or create a new application form(s)

### Edit Membership Application Form

< 1 of 3 > [Settings] [Print] [Close]

Name	Description
<input type="text" value="Membership App Form"/>	<input type="text" value="Membership App Form"/>

**Options**

<input type="checkbox"/> Allow Single Chapter Selection <span style="color: orange;">i</span>	<input type="checkbox"/> Display Membership Type Description
<input type="checkbox"/> Display Membership Benefit Description	<input type="checkbox"/> Collect Donations
<input type="checkbox"/> Automatically Approve Applications	<input type="checkbox"/> Order Memberships Lowest Price First (if not selected, the order will be highest price to lowest)

Display Only These Memberships:

Email To Send On Completion:

Url: <https://micronet.growthzoneapp.com/ap/Membership/Application/yvP3ergG>

Instructions



# Membership Application Form

- Recommendation – preview your form

Memberships   Membership Types   **Membership Application Forms**

## Membership Application Forms

[Click to preview](#)

Name	Description	Action
<a href="#">Application Form</a>	Application Form for Membership	
<a href="#">Membership Application Form- Current</a>	Membership Application Form2	



# Accepting Online Memberships

Two page application form -- first page gathers critical info

- Show Instructions
- List Membership Options
- Include descriptions
- Gather Contact Info
- Adds Contact to database - even if contact skips step 2

# Accepting Online Memberships

Second page gathers additional information

- Individual contact phone, address
- Organization contact phone, address
- Optional details
  - Select Directory Listing Category
  - Show Lists they can join
  - Allow making a donation
  - Ask “custom” questions
- Membership Owner
- Payment options
- Join button

Select Categories

**Business Category**

-- select a category item -- ▼

**Organization Directory "Where to"**

-- select a category item -- ▼

Join These Communication Lists

	Name	Description
<input type="checkbox"/>	Volunteers	Volunteers
<input type="checkbox"/>	Community News	Community News
<input type="checkbox"/>	eNewsletter	eNewsletter
<input type="checkbox"/>	Chris's Construction	

Donation/Contribution Opportunities

Campaign Name	Item Description	Amount
General Unrestricted Campaign	Donations from Individuals	Select an amount or add custom <span style="float: right;">▼</span>

Billing Details

**Membership Owner**

Organization ▼

Invoice Me

Pay Now

# New Membership Notifications

- Thank you page will appear online to new member
  - You can customize the Completion message - Memberships >Edit Membership Application Form
  - Check to allow new members ability to create their login and access the Info Hub
- New member receives an email confirmation
  - Email is sent to address associated with the Membership Owner
  - Select the email template - Memberships > Edit Membership Application Form
- Staff will receive an email alert
  - Check to subscribe to the “Membership Application Submitted” user notification

# Email Confirmation

- Membership Application Confirmation Email
- The default email sent to the new applicant may be customized
- Setup > Communication > Email Templates

## Membership Application Submitted

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Anderson's Plumbing

Thank you for filling out our membership application.

Best regards,

Member Management Training.

# Staff Email Notifications

- Staff Members subscribed to the Membership Application Submitted email notification will receive an automated email

Notifications
🗑️ ✕

Subscribe	Notification Type	Email Address	Frequency
<input checked="" type="checkbox"/>	Membership Application Submitted	cheri.petterson@growthzone	As It Happens
<input checked="" type="checkbox"/>	Member Modified Profile	cheri.petterson@growthzone	As It Happens
<input type="checkbox"/>	User Created Or Edited Web Content	cheri.petterson@growthzone	As It Happens
<input type="checkbox"/>	Member Referral	cheri.petterson@growthzone	
<input type="checkbox"/>	New Person Added To Existing Membership	cheri.petterson@growthzone	
<input checked="" type="checkbox"/>	Contact Us Submission	cheri.petterson@growthzone	
<input checked="" type="checkbox"/>	Sales Proposal Accepted	cheri.petterson@growthzone	

**Application Completed for Anderson's Plumbing**

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

Anderson's Plumbing has applied for a General Membership (\$1,200.00) to Member Management Training

The applicant's email is

The applicant's address:

# Accepting Online Memberships

- [WIKI: Approving Applications](#)

### Swags

General **Billing**

Membership Type General Membership	Membership Status Pending Approval
Bill Frequency Annually	Number
Chapter	

Approve Membership  
Delete Membership

Actions

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Contacts

[Swags](#)

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Activations





Questions?