

Setting up Your Membership Types & On-line Application Form

How to create Membership Types

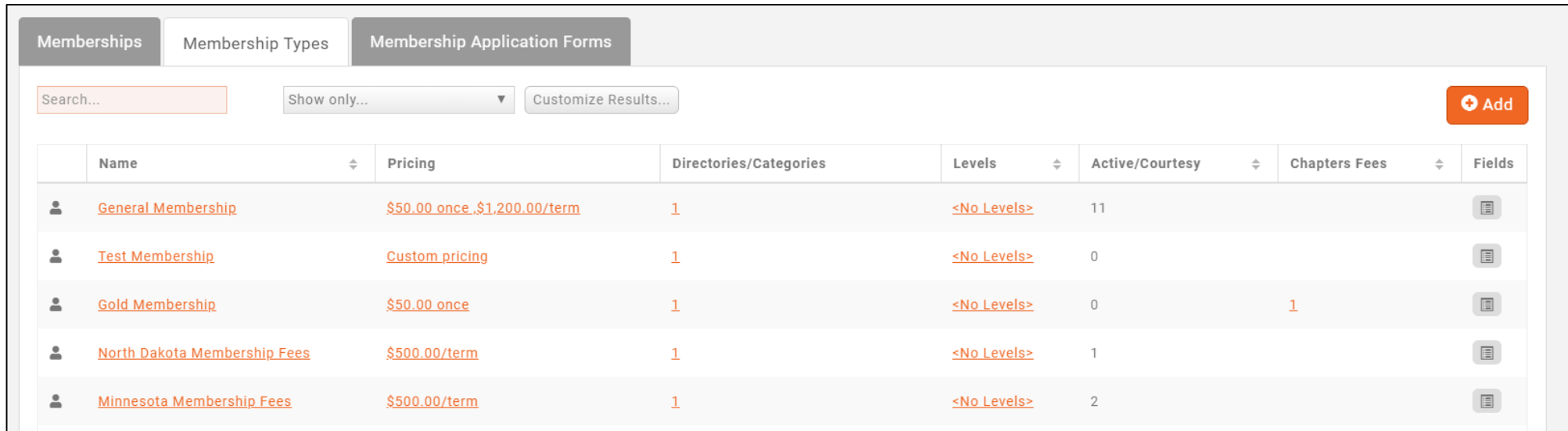
- Add Pricing to a Membership Type
- Add Directory/Category to Membership Type
- Customize Application Fields/Questions

Configure Membership Application Form Settings











Accept Online Membership Application Form

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
- WIKI: [View Membership Types](#)

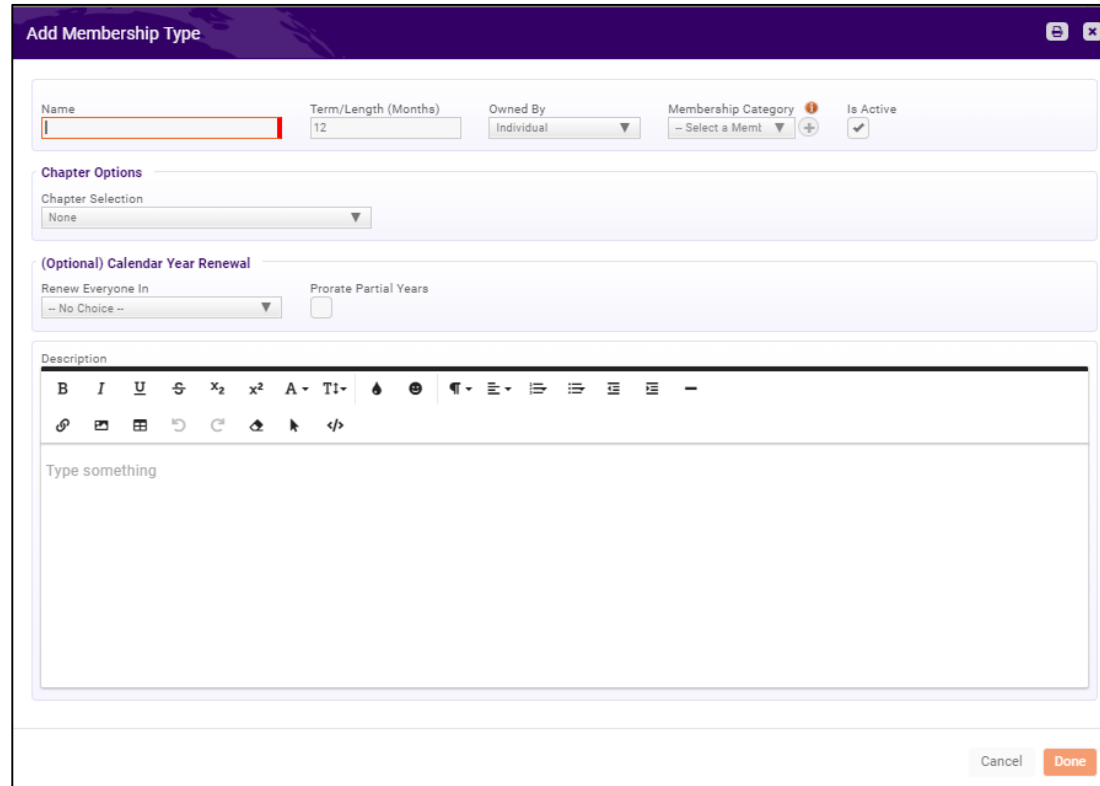


The screenshot shows a web interface for managing membership types. At the top, there are three tabs: "Memberships", "Membership Types" (which is active), and "Membership Application Forms". Below the tabs, there is a search bar, a "Show only..." dropdown menu, and a "Customize Results..." button. On the right side, there is an orange "Add" button with a plus sign. The main content is a table with the following columns: Name, Pricing, Directories/Categories, Levels, Active/Courtesy, Chapters Fees, and Fields. Each row represents a membership type and includes a person icon on the left and a list icon on the right.

	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

- Memberships > Membership Types > Add
- WIKI: [Add a New Membership Type](#)



The screenshot shows the 'Add Membership Type' form with the following fields and options:

- Name:** An empty text input field.
- Term/Length (Months):** A text input field containing the value '12'.
- Owned By:** A dropdown menu with 'Individual' selected.
- Membership Category:** A dropdown menu with '-- Select a Mem...' and a plus icon.
- Is Active:** A checked checkbox.
- Chapter Options:**
 - Chapter Selection:** A dropdown menu with 'None' selected.
- (Optional) Calendar Year Renewal:**
 - Renew Everyone In:** A dropdown menu with '-- No Choice --' selected.
 - Prorate Partial Years:** An unchecked checkbox.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, x₂, x², text color, background color, bulleted list, numbered list, indent, and outdent. Below the toolbar is a text area with the placeholder text 'Type something'.

At the bottom right of the form are 'Cancel' and 'Done' buttons.

Understanding Pro-Rating

- When setting up your Membership Types, an option is available to set a specific renewal month and to enable pro-rating
- **NOTE:** Calendar Year Renewal with or without Prorate enabled is intended to work for memberships with a 12 month term and with standard frequency selections. Do **NOT** use with a **Once Per Term Frequency**

(Optional) Calendar Year Renewal

Renew Everyone In

Prorate Partial Years

Understanding Pro-Rating

Calendar Year Renewal Month specified, Prorate on, Monthly Frequency

For Example:

Renewal Month = January, Monthly Frequency, Prorate=On, \$100/month

A new member signs up in February. The new member will be invoiced \$100 immediately (for March). The Next Scheduled Billing date will be in April for \$100/monthly.

(Optional) Calendar Year Renewal

Renew Everyone In Prorate Partial Years



Add a Membership Type

Once a membership type has been created you may:


- Add Membership Pricing
- Add Directory/Categories
- Add/Edit Fields to be included on the Membership Application Form
- Add Chapter Pricing

Add Pricing to A Membership Type


WIKI: [Add Pricing to a Membership Type](#)

Edit Membership Billing - Platinum Membership < 17 of 18 >  


Allow Invoicing Allow Online Payment Payment Gateway
-- Select a Payment Gateway --

Invoice Template -- Select an Invoice Template -- Payment Terms Due on Receipt Terms/Conditions -- Select a Terms/Conditions -- 

Recurring Fees

Item	Description	Membership Price	Hide	Default Billing Frequency	Per Bill Amount	
------	-------------	------------------	------	---------------------------	-----------------	---

Setup/One-Time Fees

Item	Description	Price	Hide	
------	-------------	-------	------	--

Cancel Done

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



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[Learn More](#)

Add Directory/Categories to Membership Type

WIKI: Setup Membership Type Directories & Categories





Edit Membership Benefits - Multiple Membership Selection - With Top Level Selection < 6 of 18 >  

Directory Listing 

Directory: Active Member Directory  Directory Display: Standard Listing   

Directory Categories

Display Directory Categories

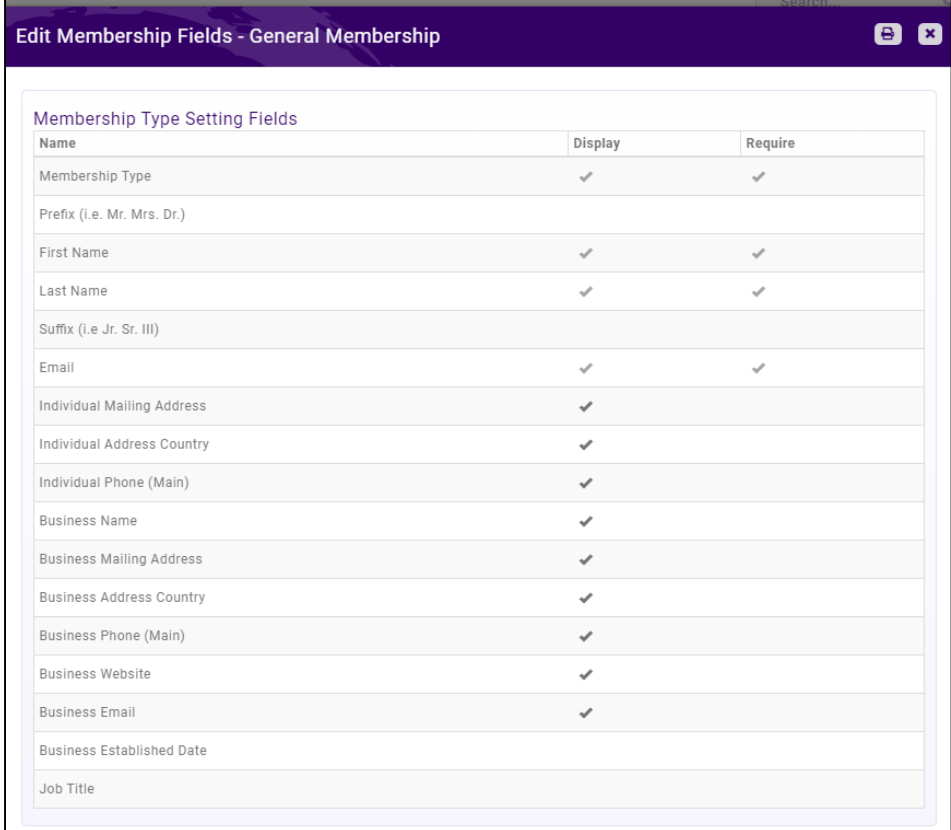
Category List: -- Select a Category L   Minimum Required: 0 Maximum Allowed:  

Cancel Done

Membership Application Form Fields/Questions

For each Membership Type, you can add/edit the fields you wish to include on your application form

WIKI: [Setup Membership Application Form Fields/Questions](#)



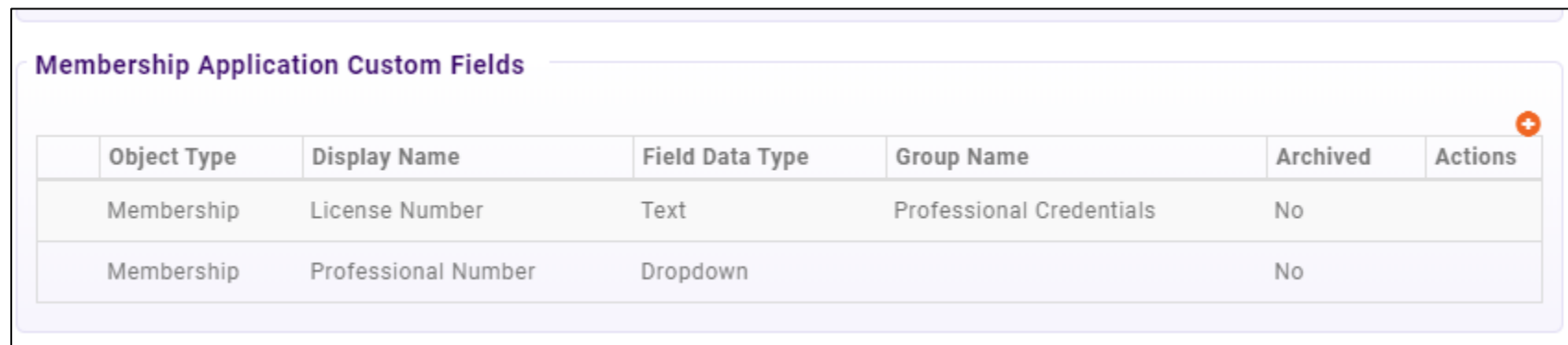
Membership Type Setting Fields

Name	Display	Require
Membership Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Prefix (i.e. Mr. Mrs. Dr.)	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Suffix (i.e. Jr. Sr. III)	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Individual Mailing Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Individual Address Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Individual Phone (Main)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Mailing Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Address Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Phone (Main)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Established Date	<input type="checkbox"/>	<input type="checkbox"/>
Job Title	<input type="checkbox"/>	<input type="checkbox"/>

Membership Application Form Fields/Questions

Membership Application Custom Fields: Additional fields may be added to your application form. Dependent on the **Field Area** selected, the field will display:

- **Individuals:** Will display on an individual's More Info tab
- **Business:** Will display on a business's More Info tab
- **Membership:** Will display under the Membership on the General Tab

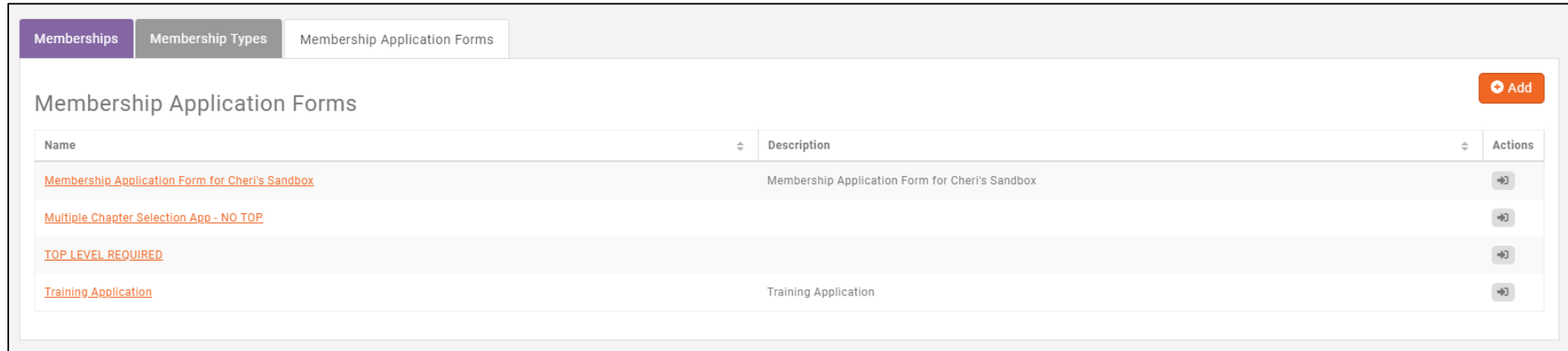


The screenshot shows a web interface titled "Membership Application Custom Fields" with a table containing two rows of field configurations. The table has columns for Object Type, Display Name, Field Data Type, Group Name, Archived, and Actions. A plus sign icon is visible in the top right corner of the table area.

Object Type	Display Name	Field Data Type	Group Name	Archived	Actions
Membership	License Number	Text	Professional Credentials	No	
Membership	Professional Number	Dropdown		No	

Membership Application Form

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)



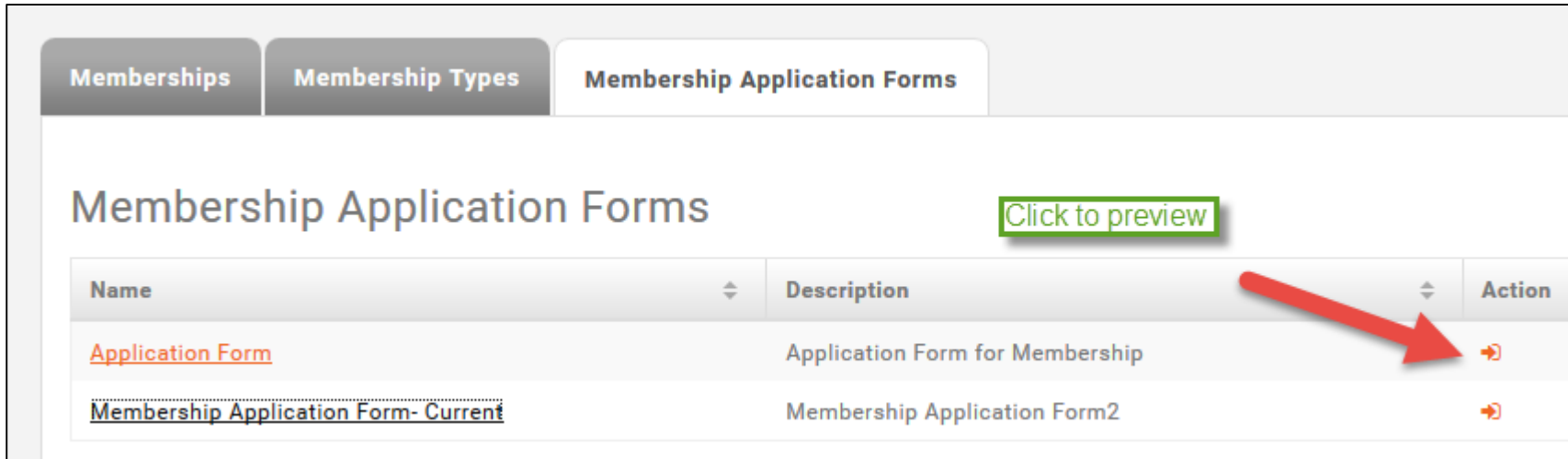
The screenshot shows a web interface for managing membership application forms. At the top, there are three tabs: 'Memberships' (selected), 'Membership Types', and 'Membership Application Forms'. Below the tabs, the title 'Membership Application Forms' is displayed on the left, and an orange 'Add' button is on the right. A table lists the existing forms with columns for Name, Description, and Actions.

Name	Description	Actions
Membership Application Form for Cheri's Sandbox	Membership Application Form for Cheri's Sandbox	[Edit]
Multiple Chapter Selection App - NO TOP		[Edit]
TOP LEVEL REQUIRED		[Edit]
Training Application	Training Application	[Edit]

Membership Application Form

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



Recommendation – preview your form



Memberships Membership Types **Membership Application Forms**

Membership Application Forms

[Click to preview](#)

Name	Description	Action
Application Form	Application Form for Membership	
Membership Application Form- Current	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

Billing Details

Membership Owner
Organization

Invoice Me
 Pay Now

Join

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

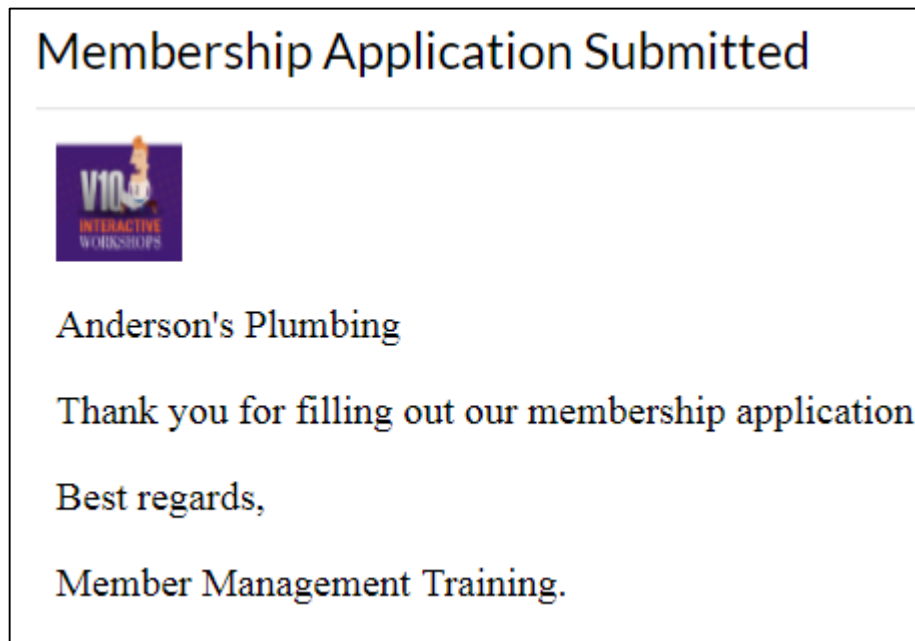
Staff will receive an email alert

- Check to subscribe to the “Membership Application Submitted” user notification

Membership Application Confirmation Email

The default email sent to the new applicant may be customized

Setup > Communication > Email Templates



Staff Email Notifications

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

Notifications [Close] [Refresh]

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	

Contacts

[Swags](#)

[Joan Marks](#) joan@mailinator.com

Activations

Approve Membership

Delete Membership

Actions

Questions?