Setting up Your Membership Types & On-line Application Form
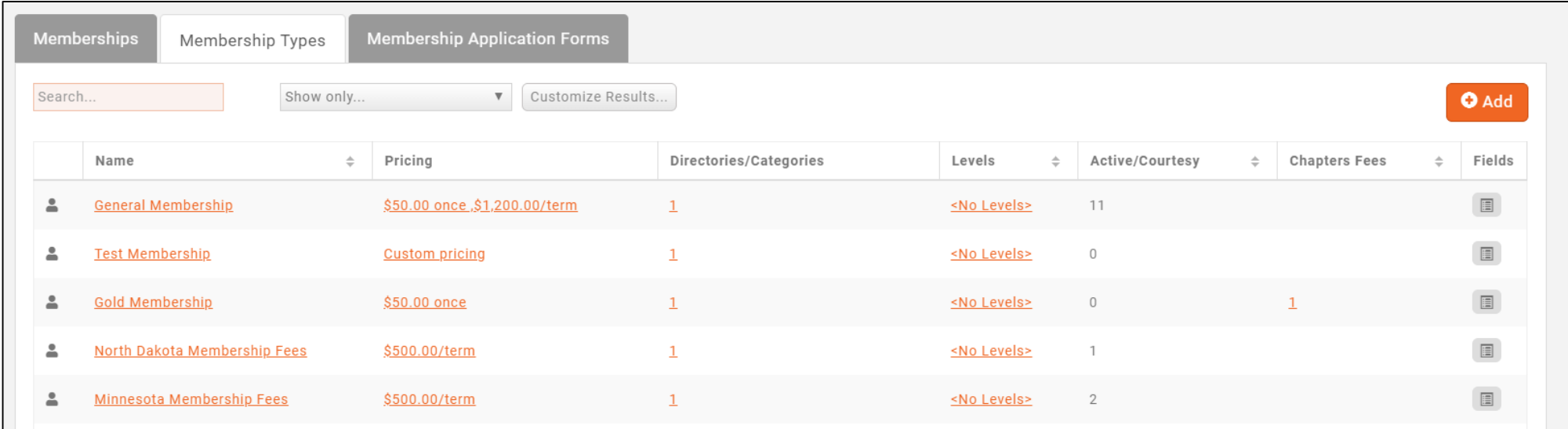
Agenda

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 my be included on your membership application form
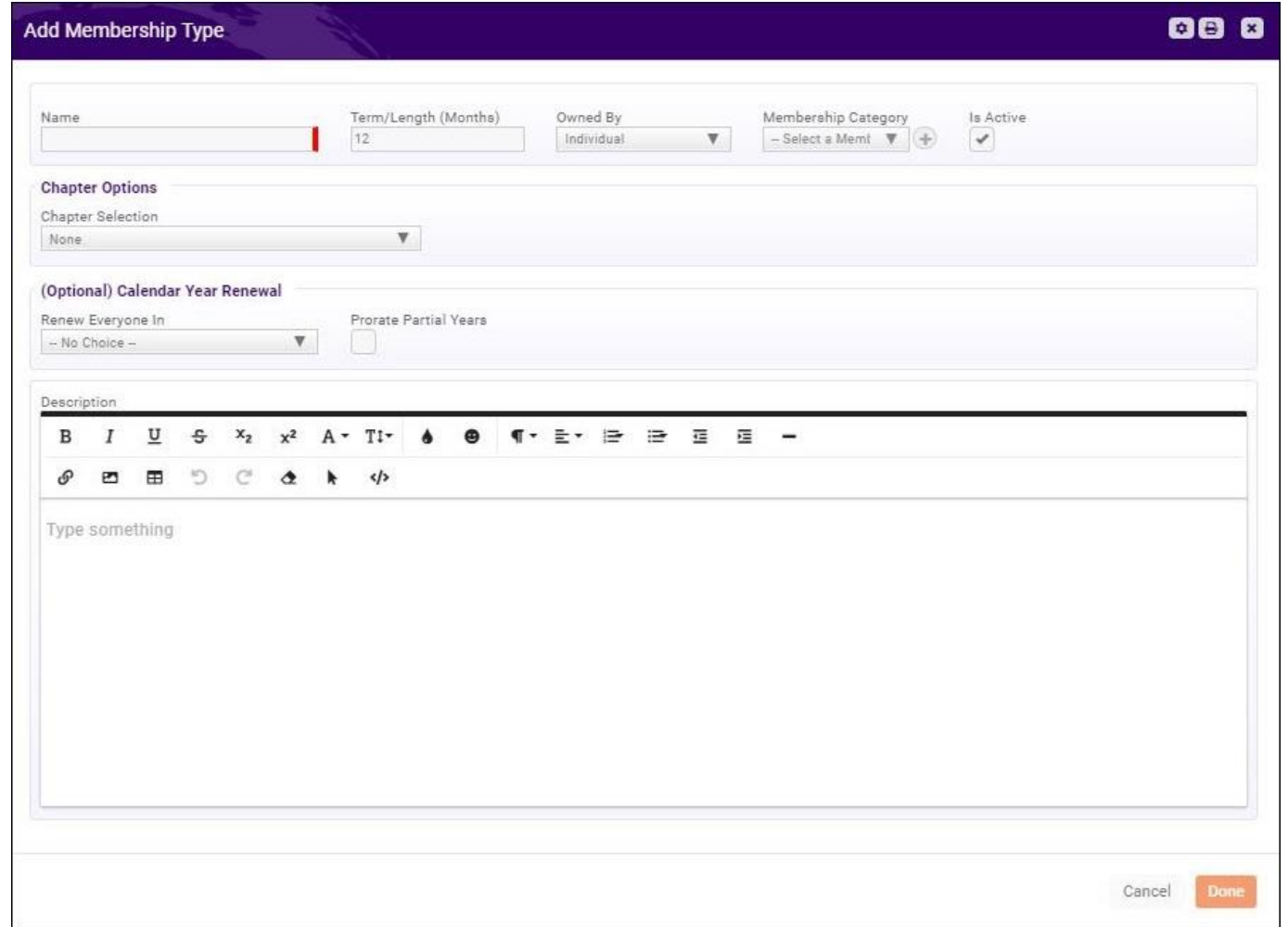- WIKI: View Membership Types

	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

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**

- **WIKI: Understanding Pro-rating**

Understanding Pro-Rating

- By default, Memberships that have **Prorate Partial Years** enabled will charge applicants that join on the 1st - 15th of the month for the full month. Applicants joining after the 15th will receive the current month for free but will be charged for the next term.

- You can change the cutoff day of the month by selecting the **Prorate Cutoff Day** under **Setup > Membership Settings**.

Add a Membership Type

Once a membership type has been created you may:

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

Add Pricing to A Membership Type

WIKI: Add Pricing to a Membership Type

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

Add Directory/Categories to Membership Type

WIKI: **Setup Membership Type Directories & Categories**
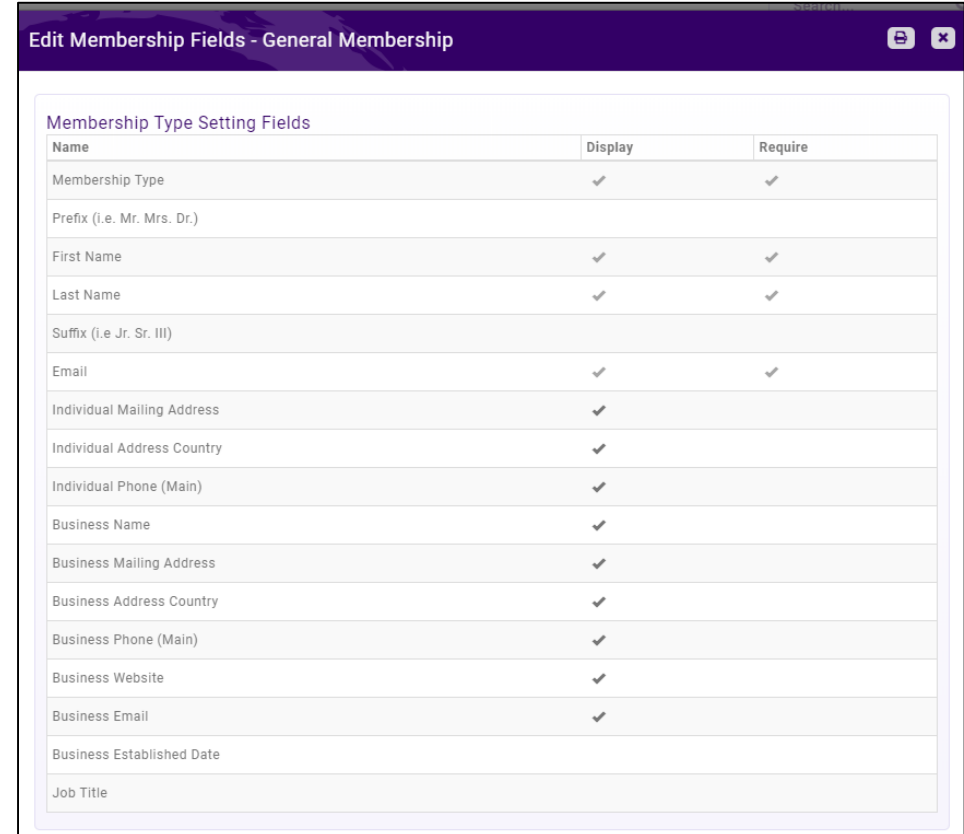
Membership Application Form Fields/Questions

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**

Edit Membership Fields - General Membership

Membership Type Setting Fields

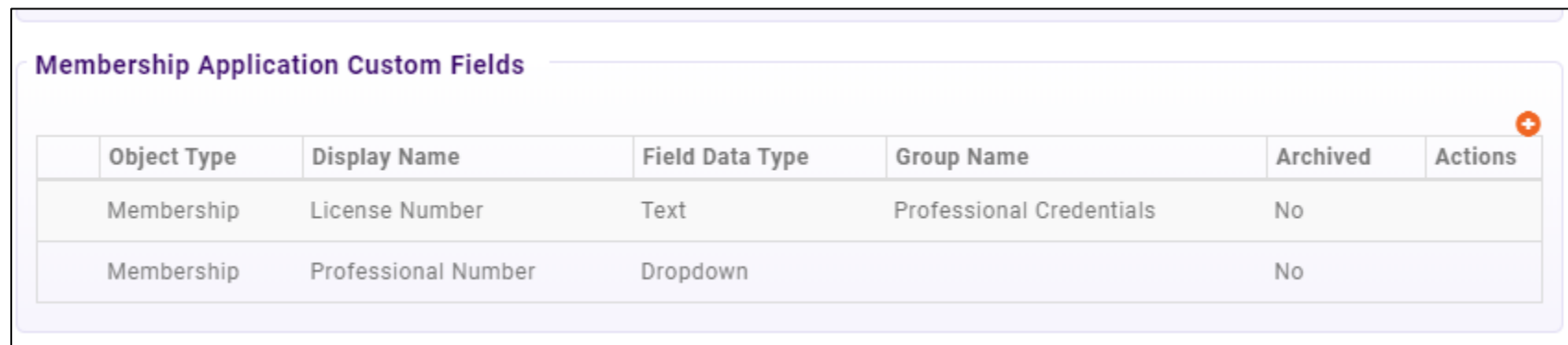| Name	Display	Require
Membership Type	✓	✓
Prefix (i.e. Mr. Mrs. Dr.)		
First Name	✓	✓
Last Name	✓	✓
Suffix (i.e Jr. Sr. III)		
Email	✓	✓
Individual Mailing Address	✓	
Individual Address Country	✓	
Individual Phone (Main)	✓	
Business Name	✓	
Business Mailing Address	✓	
Business Address Country	✓	
Business Phone (Main)	✓	
Business Website	✓	
Business Email	✓	
Business Established Date		
Job Title		

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

Membership Application Custom Fields

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

Add Levels to Your Membership Type

Membership Levels allow you the flexibility to offer the same membership, but offer different prices.

For example, you may offer a General Membership, where pricing is based on the number of employees:

- General Membership – 1 – 5 employees
- General Membership – 6 – 15 employees
- General Membership – 16 – 25 employees

This would be one membership type (General Membership) with 3 levels

Add Levels to Your Membership Type

WIKI: Setup Membership Type Levels
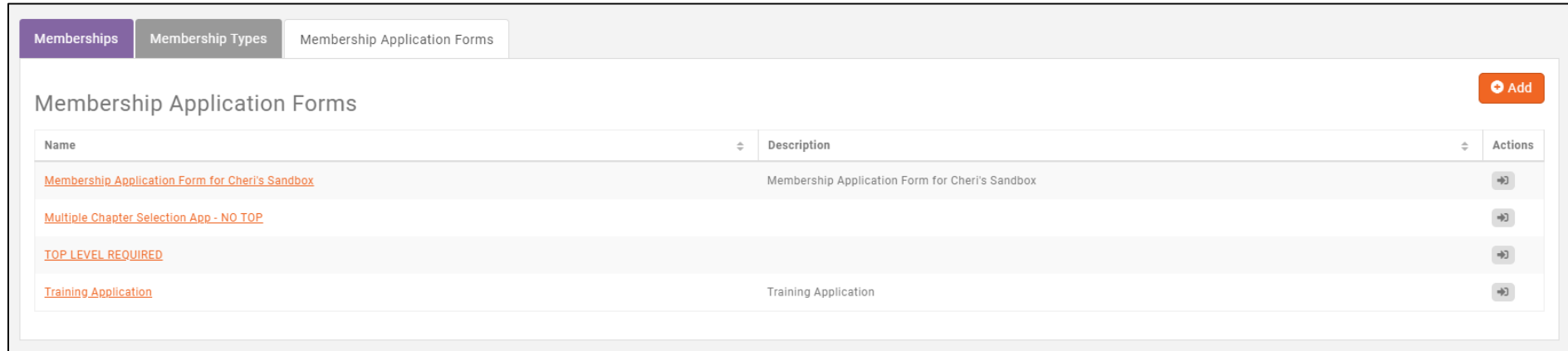
Membership Application Form

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)
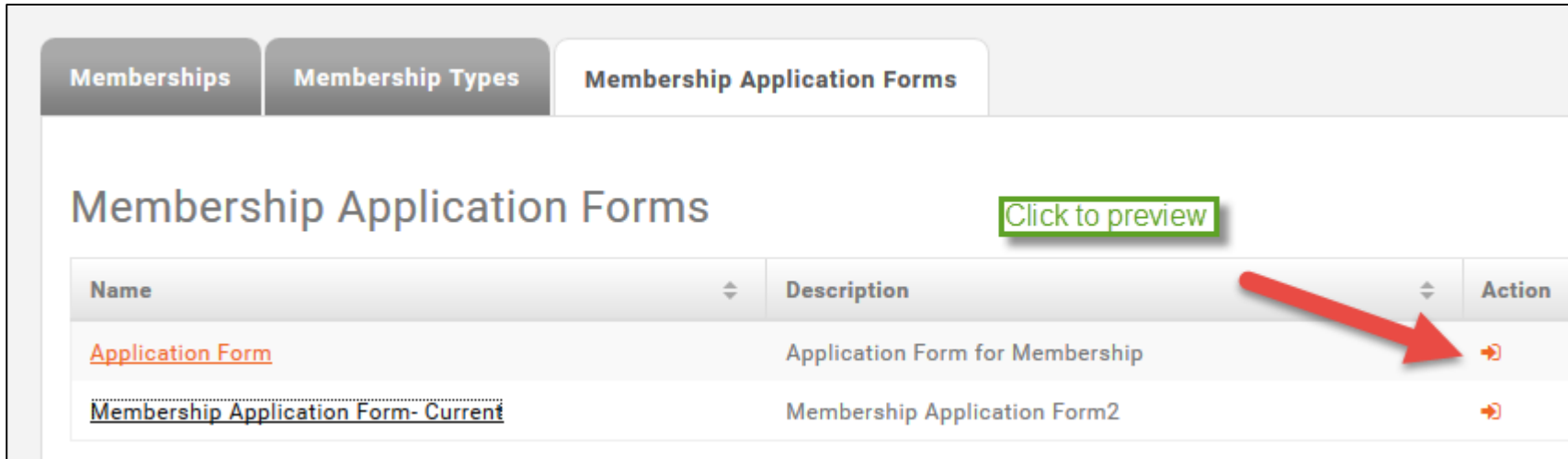
Membership Application Form

WIKI: View/Create Membership Application Form

Recommendation – preview your form

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

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
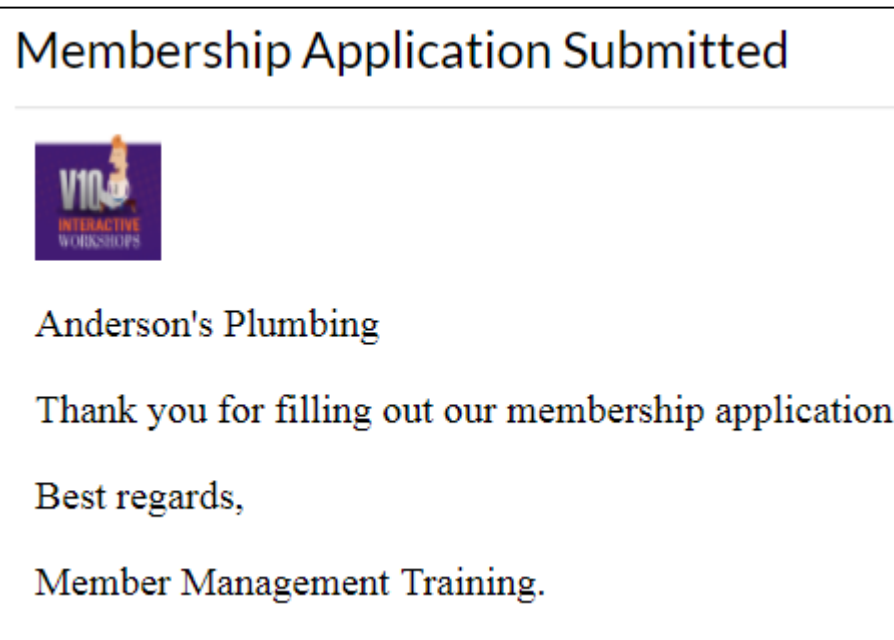- Select the email template - Memberships > Edit Membership Application Form

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

Staff Email Notifications

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

Accepting Online Memberships

WIKI: Approving Applications

Contact record:

Submitted Applications:

Questions?