

Memberships: How to Create Membership Types and Benefits

<i>Speech</i>	<i>Cursor Actions</i>
<p>Organizations that run Membership programs often have different levels of memberships, like Adult, Senior, Student and Family. Each Membership Type likely has a different fee associated with it. Your organization may also offer different benefits for each membership level. For example, an Adult Membership might cost \$50, and receive benefits like free admission to events, a member magazine or newsletter, and a vote at your annual general meeting.</p> <p>Sumac allows you to customize the membership benefits, types and fees in your database.</p>	<p>show the membership types, with different fees; pictures would be nice but just bullet form text would be okay too</p>
<p>If your organization offers benefits for each level of membership, begin by defining your list of Membership Benefits.</p>	<p><i>title:</i> 1. Define Membership Benefits</p>
<p>In your Sumac console, click Utilities, Customize Database and Lookup Lists.</p>	<p>Show console. Expand Utilities, Customize Database. Choose Lookup Lists.</p>
<p>Choose the Area: Memberships, then choose the Lookup List: Membership Benefits.</p>	<p>Choose Area: Memberships. Choose Lookup List: Membership Benefits.</p>
<p>Click New to add a new Benefit.</p>	<p>Click New. Type: 50% Discount for Admission to Events.</p>
<p>Click OK, and Sumac saves that benefit into your database.</p>	<p>Click OK.</p>
<p>Continue this process until you've set up the entire list of all the member benefits your organization offers.</p>	<p>Add Benefits: One Vote at Annual General Meeting 15% Discount on Store Items 10% Discount at Nearby Restaurants Newsletter Recognition Member Magazine/Newsletter</p>
<p>Once the benefits have been defined, move on to defining your Membership Types. The Membership Types indicate the cost and benefits associated with each level of your Membership Program.</p>	<p><i>title:</i> 2. Define Membership Types</p>
<p>Choose the Lookup List: Membership Types.</p>	<p>Choose Lookup List: Membership Types</p>
<p>Click New to add a new Membership Type.</p>	<p>Click New</p>
<p>First enter the name of this Membership Type</p>	<p>Enter Name: Adult</p>
<p>Number of Membership Cards allows you to define a limit on the number of memberships of this type you will issue in a year. If your organization does not have a limit, you can leave this at "0"</p>	<p>Point to Number of Membership Cards</p>

Number of grace days after expiry allows you to define the number of grace days you will honour the benefits of this type of membership after the membership expires. For example, you may honour this type of membership for 30 days after the expiry date.	Point to Number of grace days Enter “30”
You could also specify a date when this type of membership will no longer be available.	Point to When no longer available
You can pre-set a default start date, and expiry date for each type of membership. If a certain type of membership always expires on the same date, then this saves having to enter the expiry date into every membership record of that type. For example, perhaps this type of membership always begins on January 1, and always expires on December 31.	Point to default Start date. Point to default Expiry date. Enter Start Date: January 1 Enter Expiry Date: December 31
If there are standard templates that you use for renewal or thank you messages, you can specify those templates here. That way Sumac will remember which template you want to use in those situations.	Point to Template fields.
Enter the Annual Fee for this membership. For this example, we'll set the Annual Fee at \$50	Enter Annual Fee: 50.00
You can also specify a mandatory donation amount in addition to the fee for this membership. For example, perhaps Adult Members are required to make a \$20 donation when purchasing their membership. If you specify a mandatory donation amount here, Sumac will fill in this donation amount any time you add a membership of this type to your database.	Enter Required Donation Amount: 20.00
A membership can have up to two surcharges. You can choose the applicable surcharges from these drop-down menus.	Point to Surcharge drop-down menus.
If you want users to be able to specify surcharges when they enter the membership record, click one, or both of the “Let user choose surcharge” check boxes.	Point to Let User Choose checkboxes
If you are integrating Sumac Memberships with your website, you can also indicate that a particular membership type should <i>not</i> be displayed for purchase or renewals occurring on your website.	Point to Do not display on web
Finally, you'll notice that the Membership Benefits we defined earlier appear in the dialog window for defining the Membership Type. Put a check mark next to any benefit that applies to this Membership Type.	Check: free admission to events, Member Magazine/Newsletter, and Vote at Annual General Meeting.
Click OK to save this Membership Type.	Click OK
Continue this process until you've defined all the Membership Types your organization offers.	
<i>Check out more training videos to learn more about Sumac!</i>	