

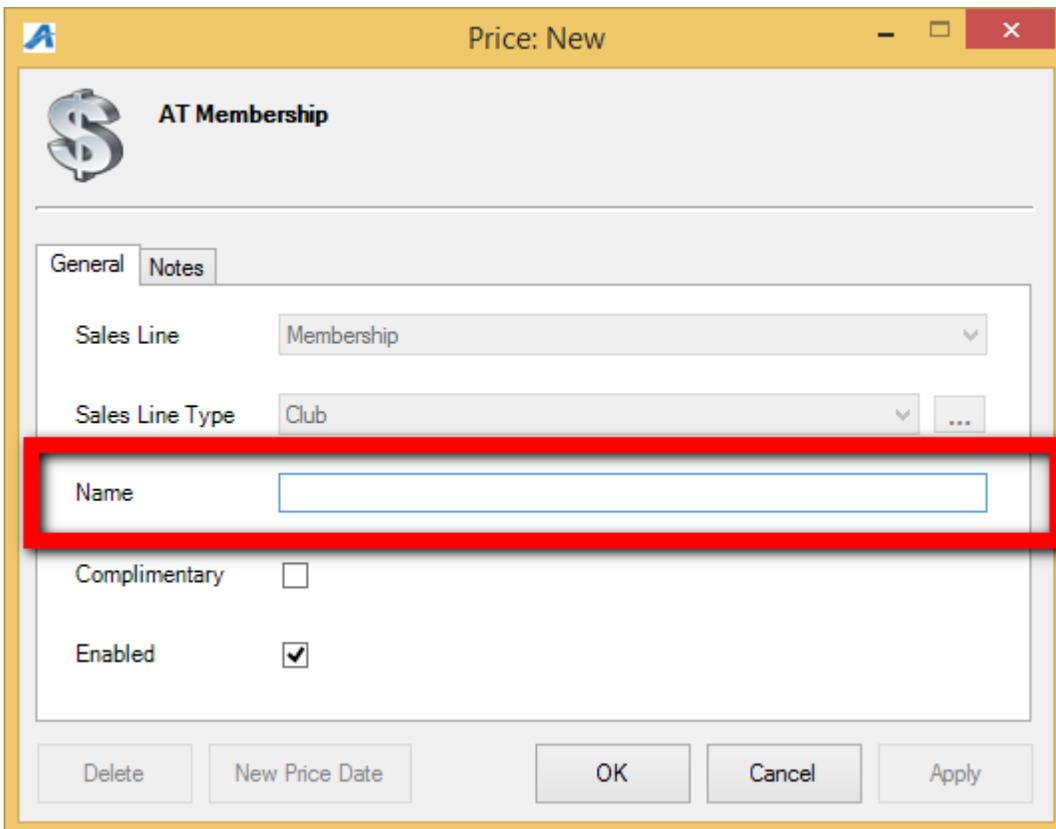
Adding a Membership Price

1. Log in to **Administration**.
2. Click on the **Corporate Organization** icon.
3. Open the **Membership** sales organization folder and click on the **Membership** icon.



Membership

4. Select the correct membership and right-click in the **Membership Price** field, then select **New**.
5. In **General** tab:
 - Select the price in the list pricing list. If a new price needs to be created, right-click in the price list field and select **New Price**. Enter in the name of the price. Click **Apply** to save the name and then **OK**.



The screenshot shows a dialog box titled "Price: New" for "AT Membership". The dialog has a "General" tab selected. The "Sales Line" is set to "Membership" and the "Sales Line Type" is set to "Club". The "Name" field is highlighted with a red box. Below the "Name" field are checkboxes for "Complimentary" (unchecked) and "Enabled" (checked). At the bottom of the dialog are buttons for "Delete", "New Price Date", "OK", "Cancel", and "Apply".

- Right-click in the **Distributions** box and click **New**.

Price Distribution: New

AT Membership
Club - Child 13 under

General

Distributions	Category	Amount	Redeemed Account	Unredeemed Account	Tax Type

Effective Sale Date: 08/31/2015 12:00:00 AM

Fair Market Value: 0.00

Enabled:

Sales Occurred:

Override Effective Event Date

Category Totals

Price	\$0.00
Total	\$0.00

Buttons: Delete, OK, Cancel, Apply

- Enter in the Price and select the correct **Unredeemed** and **Redeemed Accounts**. (Unredeemed and Redeemed Accounts are preset revenue accounts that report the monies to certain GL accounting codes) Click **Apply** and then **OK**.

Price Distribution: New

AT Membership
Child 13 under - \$0.00

General

Price Category: Price

Amount: 0.00

Tax Rate:

Unredeemed Account: Membership Rev Film Buff

Redeemed Account: Membership Rev Film Buff

Buttons: Delete, OK, Cancel, Apply

- Click **Apply** then **OK** in the **Price Distribution** window.
- Select the price from the price list.

Membership Price: New

AT Membership

General | Description | Card Image | Promotions | Questions | Member Benefits | Customer Benefits | Donor Management

Effective Sale Date: 8/31/2015

Name	Comp	Price	Total
Fim Buff Price	False	\$45.00	\$45.00
Premiere	False	\$100.00	\$100.00
Adult	False	\$25.00	\$25.00
Student	False	\$60.00	\$60.00
Child 13 & under	False	\$50.00	\$50.00

Sales Channel: AMS BoxOffice Enabled

Price Type: ... Include Service Fee

Level: ... Membership Renewal

Functional Area: Level 0 - Default Unrestricted Price Allow 12-Month Pledge

Card Format: No Ticket Print Sales Occurred

Card Per Member Single Card

Expiration: 1 Months

Display Sequence: 0

Quantity Restriction: Min Per Order 0 Max Per Order 10

Multiple Customers: Min Customers 0 Max Customers 10

Buttons: Add New, Delete, OK, Cancel, Apply

- **Sales Channel:** select a sales channel the membership will be sold through. **NOTE:** Most memberships will have the prices available through multiple sales

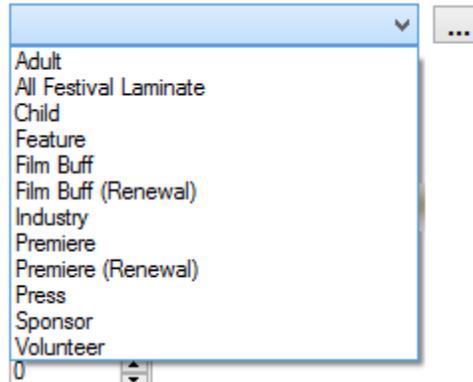
channels.

Sales Channel

- AMS BoxOffice
- AMS BoxOffice
- Web Advanced

- **Price Type:** this is the name of the membership, and will appear online. If the name of the membership price type is not listed in the drop down, click on the ellipsis button to create the new membership **Price Type** name.

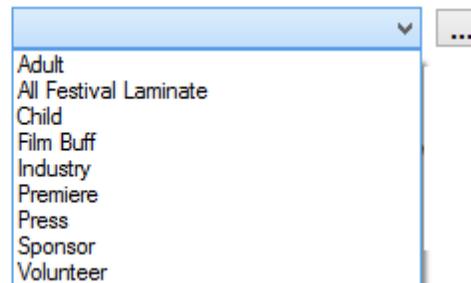
Price Type



A dropdown menu for 'Price Type' with a list of options: Adult, All Festival Laminate, Child, Feature, Film Buff, Film Buff (Renewal), Industry, Premiere, Premiere (Renewal), Press, Sponsor, and Volunteer. An ellipsis button is visible to the right of the dropdown.

- **Level:** This should be a generic name of the membership. (i.e. there may be multiple versions of the same memberships: complimentary, discounted, dual, etc. but they are all the same membership level). If the **Level** name is not listed, click on the ellipsis button to create the new **Level** name

Level



A dropdown menu for 'Level' with a list of options: Adult, All Festival Laminate, Child, Film Buff, Industry, Premiere, Press, Sponsor, and Volunteer. An ellipsis button is visible to the right of the dropdown.

- **Functional Area:** Choose the appropriate restriction level for this membership. Most membership prices are listed at a Level 0 so customers and cashiers have access to those prices both in the box office and online. Restricted prices are generally set for complimentary type of memberships that restricts access to these prices.

Functional Area



A dropdown menu for 'Functional Area' with a list of options: Level 0 - Default Unrestricted Price, Level 1 - Restricted Price(s), Level 2 - Restricted Price(s), Level 3 - Restricted Price(s), and Level 4 - Hidden Price(s). The first option is selected and highlighted in blue.

- **Card Format:** Choose the card format for the membership to print on.

Card Format



A dropdown menu for 'Card Format' with a list of options: No Ticket Print, Press Laminate, Film Buff Membership Card, Sponsor Laminate, Premiere Membership Card, Industry Laminate, Volunteer Laminate, and No Ticket Print. The first and last options are highlighted in blue.

- **Card Per Member:** Will allow for multiple cards to be printed with the same member number whereas a **Single Card** will only print one card, regardless of the number of members on the membership.

Card Per Member Single Card

- **Expiration:** Enter in the number of months the membership should be good for from the date of purchase.

Expiration Months

- **Display Sequence:** use this to select the appearance and order the memberships prices should appear, both in AMS sales screen, POS sales screen and online.

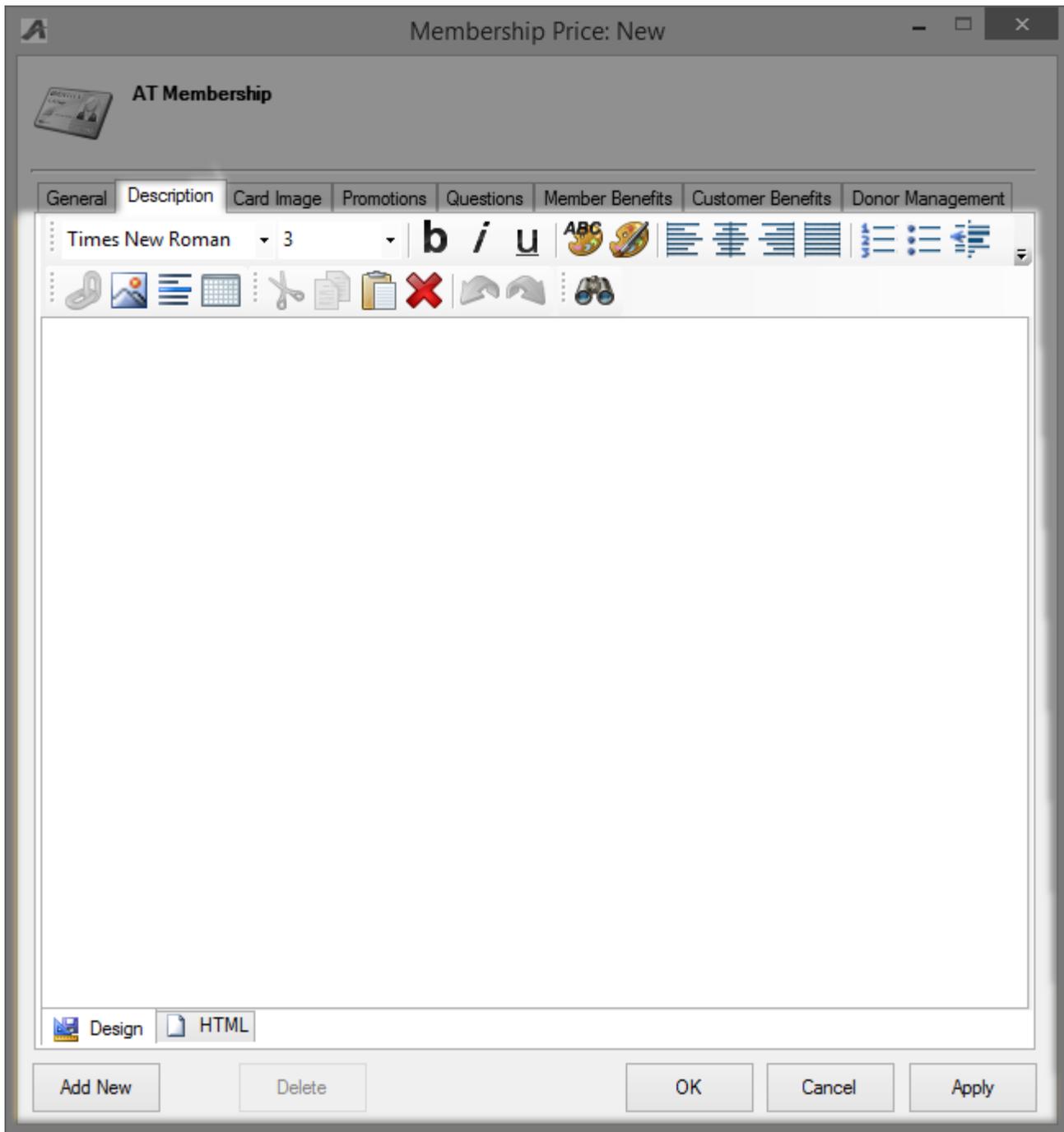
Display Sequence

- **Quantity Restriction:** enter in the numbers if there is a limit on how many memberships can be purchased.

Quantity Restriction Min Per Order Max Per Order
Multiple Customers Min Customers Max Customers

- **Multiple Customers:** enter in the number of customers that can be on the membership.
- If the membership is a Renewal, then make sure **Membership Renewal** is checked.
- If the membership can be paid for over 12-month period, check **Allow 12-Month Pledge** box. **NOTE: This is for Donor Perfect clients only.**

6. In the **Description** tab: Enter in specific information about this membership price. This will be displayed online.



8. **Promotions Tab:** add specific promotion codes to the selected promotions column if they apply to this membership.

The screenshot shows a software window titled "Membership Price: New" with a tabbed interface. The "Promotions" tab is active, showing two columns: "Available Promotions" and "Selected Promotions".

Available Promotions	Selected Promotions
bogo Discount 1	

Navigation buttons between columns: >, >>, <, <<

Bottom buttons: Add New, Delete, OK, Cancel, Apply

9. **Questions Tab:** add specific questions to the selected questions column if they apply to this membership. For more information see [Creating Order Questions](#).

Membership Price: New

AT Membership

General | Description | Card Image | Promotions | **Questions** | Member Benefits | Customer Benefits | Donor Management

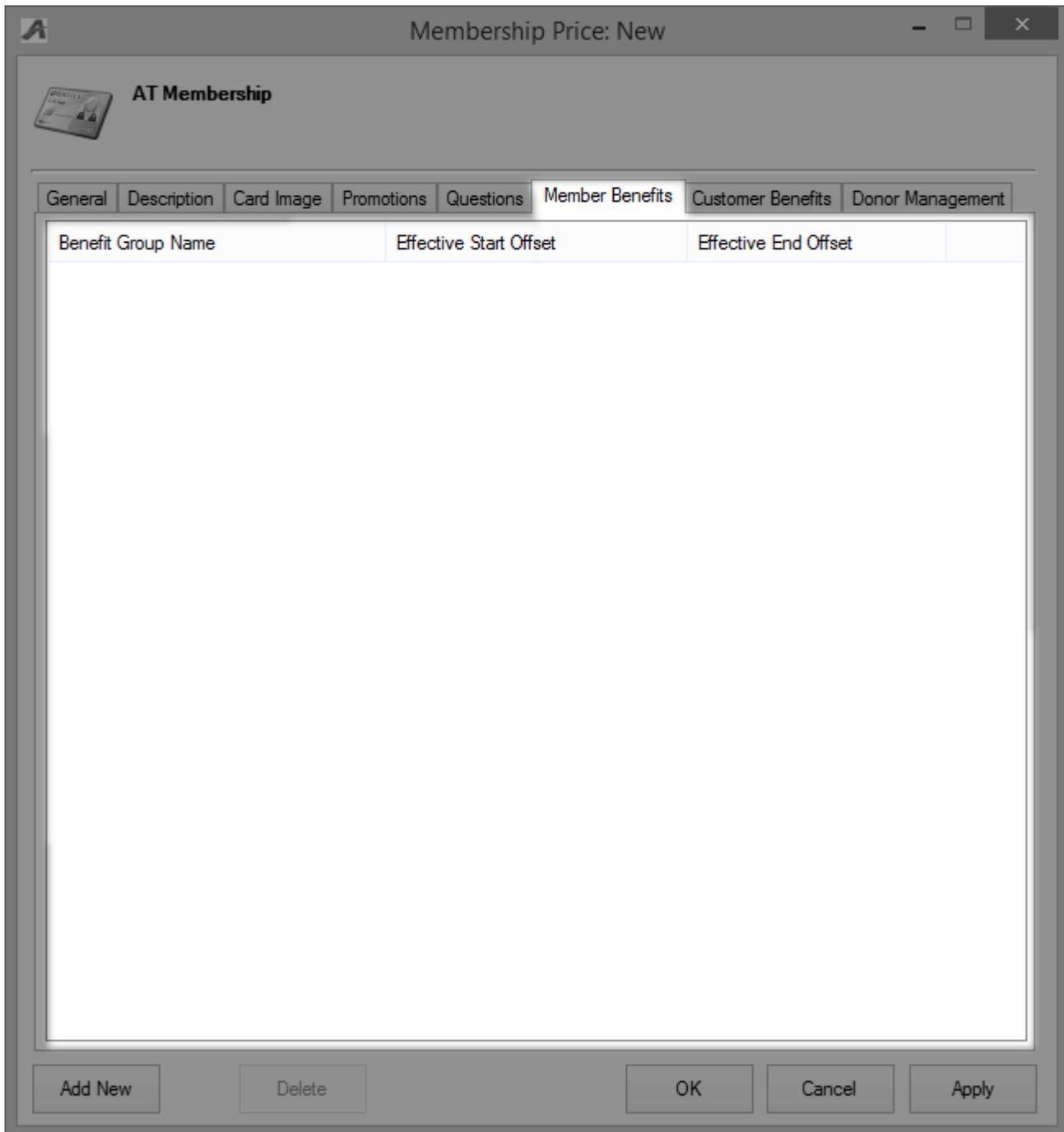
Available Questions ... Selected Questions

How did you hear about us?

>
>>
<
<<

Add New Delete OK Cancel Apply

10. **Member Benefits** tab: right-click and select **New**. Select the correct benefit group from the drop-down menu. **THIS STEP IS VERY IMPORTANT. If the Benefit Group is not added to the price, then members will not be able to access any of their benefits online.**



The screenshot shows a software window titled "Membership Price: New" with a close button (X) in the top right corner. The window content is titled "AT Membership" and includes a small card image icon. Below the title is a tabbed interface with the following tabs: "General", "Description", "Card Image", "Promotions", "Questions", "Member Benefits" (which is the active tab), "Customer Benefits", and "Donor Management". The "Member Benefits" tab contains a table with three columns: "Benefit Group Name", "Effective Start Offset", and "Effective End Offset". The table is currently empty. At the bottom of the window, there are five buttons: "Add New", "Delete", "OK", "Cancel", and "Apply".

Benefit Group Name	Effective Start Offset	Effective End Offset
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- Enter in the **Effective Start/End Offset** dates. If a membership is effective for 12 months, enter in 12 in the Months box of the **Effective End Offset**.

11. **Customer Benefits tab**: right-click and select **New**. Select the correct benefit group from the drop-down menu. Enter in the **Effective Start/End** dates. Check **Attach to Memberships**

12. **Donor Management tab:** see [Setting Up The Donor Perfect Integration](#) on donor management specifications located on the Agile knowledge base.

The screenshot shows a software window titled "Membership Price: New" with a standard Windows-style title bar (minimize, maximize, close buttons). The window content is titled "AT Membership" and features a tabbed interface. The "Donor Management" tab is selected, showing a list of properties for gift and other items. Each property has a dropdown menu and a green plus sign icon to its right, indicating a selection or addition action. The "Include In Gift Calculations" property has a checked checkbox, while "Include Item Description Details" has an unchecked checkbox. At the bottom of the window, there are five buttons: "Add New", "Delete", "OK", "Cancel", and "Apply".

Property	Value	Action
Donor Perfect Campaign	[Dropdown]	+
Donor Perfect Solicitation	[Dropdown]	+
Donor Perfect Sub Solicitation	[Dropdown]	+
Donor Perfect Thank-You Letter	[Dropdown]	+
Include In Gift Calculations	<input checked="" type="checkbox"/>	
Non-Gift Item Category	[Dropdown]	+
Include Item Description Details	<input type="checkbox"/>	

13. Click **Apply** to save and **OK** to close the screen.