Manually Adding A Membership Benefit To An Existing Member

Normally when a membership program is built, a member's benefits are determined by the benefit group attached to the membership they purchased or renewed. At times, however, there may be a need to manually add a benefit to an existing member's account (i.e. adding a special comp benefit for a specific member's account as a thank you for something special that they did for your organization, customer relations issues, etc.). The steps below will show you how to add these benefits manually to a member's account.

1. Search for the **Customer's Membership** account by clicking the **Member Button** and entering their last name or membership number. Then, select the **Customer**account for this member.



2. Click the **Customer Number** to open the **Customer Account Record.**

****

3. In the **Customer Account** window, select the **Memberships** tab.



4. Right-click the **Membership** and select **Properties** to open up the **Order Member Properties** window.



5. Select the **Benefit Groups** tab.



6. Right-click in the window. If you need to add a benefit, select **Add**. If you only need to edit a benefit, select **Properties**.



7. In the **Membership Benefit Group Properties** window, select the **Benefit Group** that you are manually adding to the **Membership Record**.



8. Adjust the **Start Date** and **End Date** for when this benefit will be available. Once completed, click **OK** and then close the **Member Properties** window.



**NOTE:** If you make a mistake and select the wrong Benefit Group, you can right-click the benefit, select **Delete**, and make a new benefit with the correct Benefit Group.