

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.

Agile Demo - Sales (DEMO) - Powered by Agile Ticketing

File View Action Ticket Printer Sales Mode Support Functions Help

Sales Maintenance Point Of Sale Clear Order Override Customer **Member** Remove Contact Item List Payment

Agile Theatre Phone: [] [] [] Email: [] [] [] Zip: [] [] []

-Select Buyer Type-

-Customer Classification N

Membership Package Catalog Donation Even

2016 Agile Features (1
2016 Agile Shorts (16A
Yearly Programing/Spe

Search

Order #:
Item Count: 0 Item(s)
Subtotal:
Ticket Fees:
Service Fees:
Order Fees:
Delivery Fees:
Donations:
Tax:
Order Total:
Balance Due:

Customer Search

Last Name: Munster City: [] [] [] Member #: 73955

First Name: [] [] [] State: [] Membership: []

Phone: [] [] [] Zip: [] [] []

Email: [] [] [] Customer #: [] [] []

Records Per Page: 20 Search

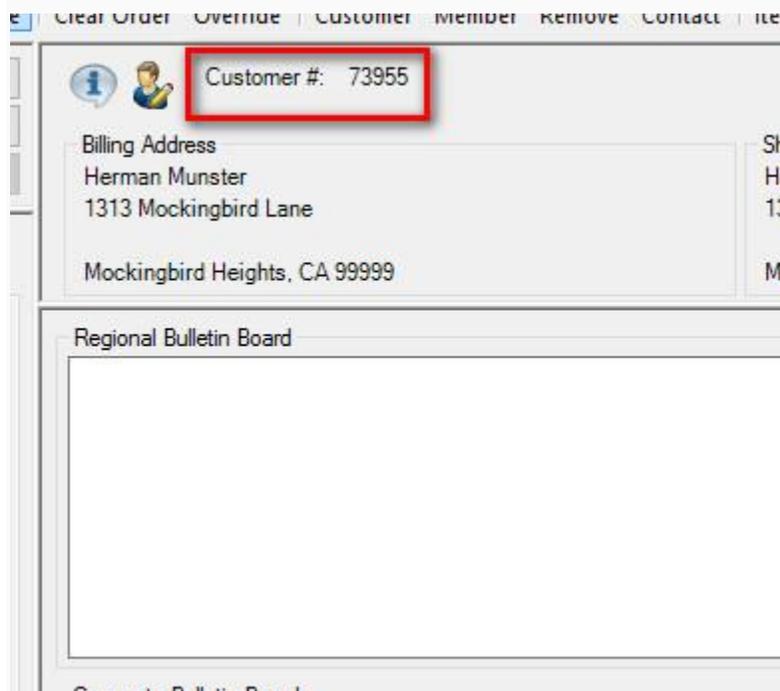
Last Name	First Name	Customer #	Street 1	City	State	Zip	Parent Name
* Munster	Herman	73955	1313 Mocki...	Mockingbird ...	CA	99999	
* Munster	Lily	73956	1313 Mocki...	Mockingbird ...	CA	99999	

* indicates customer has orders

Previous Next View Add New OK Cancel

type Due Di
none
mail Jul 17,
mail May 22
none Oct 22,
mail Sep 27,
none Jul 17,
mail
mail Dec 26
none Jun 26

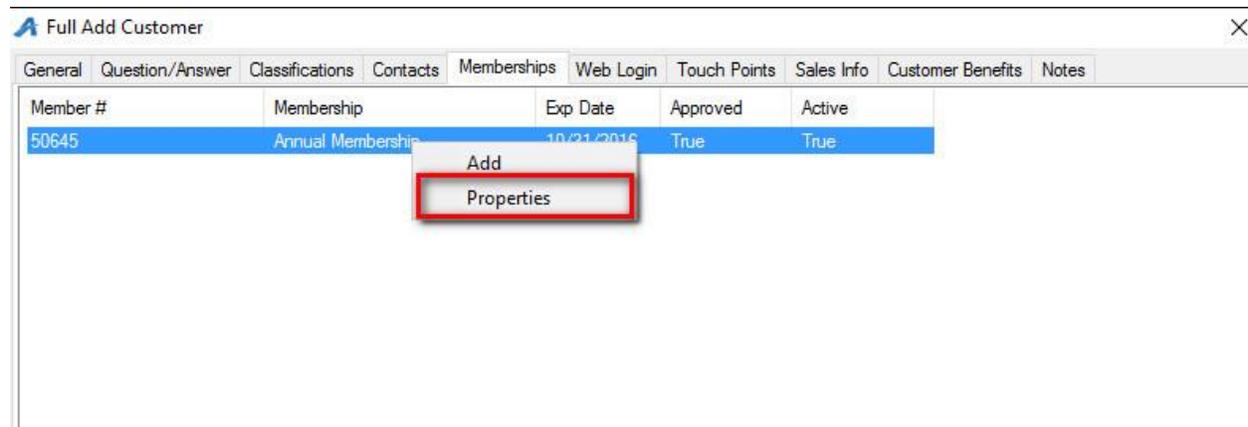
2. Click the **Customer Number** to open the **Customer Account Record**.



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



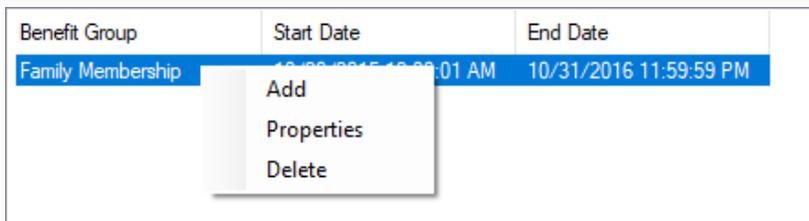
4. Right-click the **Membership** and select **Properties** to open up the **Order Member Properties** window.



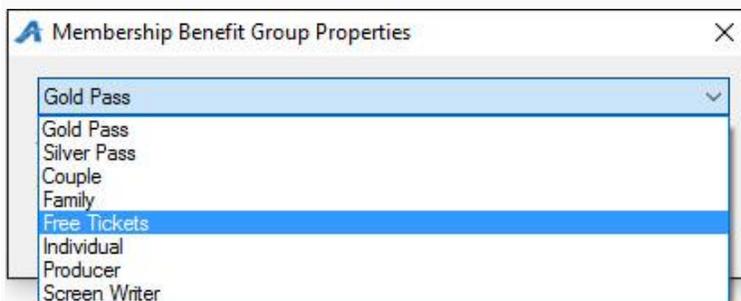
5. Select the **Benefit Groups** tab.



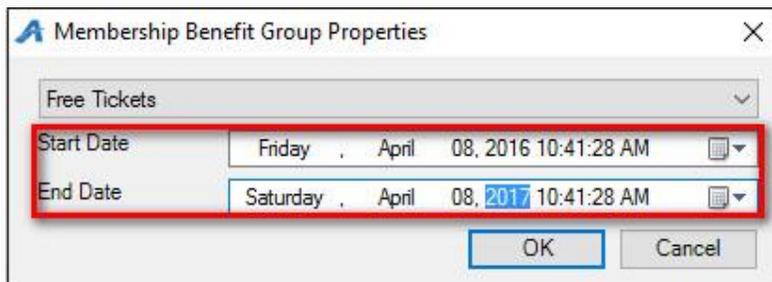
6. Right-click in the window. If you need to add a benefit, select **Add**. If you only need to edit a benefit, select **Properties**.



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.