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.

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

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Herman Munster	H
1313 Mockingbird Lane	15
Mockingbird Heights, CA 99999	M

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

Member # Membership Exp Date Approved Active	h Points Sales Info Customer Benefits Notes	Touch Points	Web Login	Memberships	Contacts	Classifications	Question/Answer	General
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5. Select the **Benefit Groups** tab.

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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**.

Benefit Group	Start Date	End Date
Family Membership	Add Properties Delete	10/31/2016 11:59:59 PM

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

Membership Benefit Group Properties	>
Gold Pass	~
Gold Pass Silver Pass Couple Family	
Free Tickets	
Individual Producer Screen Writer	

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.

Free Tickets			~
Start Date	Friday , A	pril 08, 2016 10	:41:28 AM 🛛 🗐 🔻
End Date	Saturday , A	pril 08, 2017 10	:41:28 AM

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.