

Creating Member Benefit Groups and Adding Member Benefits

Member Benefit Groups

In Agile, a membership program allows organizations to create specific permissions and benefit groups that are associated with a specific membership level. **NOTE:** Benefit groups need to be created prior to building the Membership pricing levels, as they will need to be associated with the price type and level.

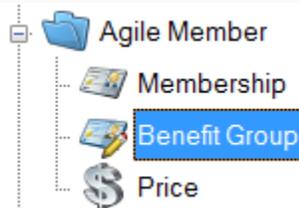
1. Login to **Administration**.
2. Select the **House** icon for your organization.



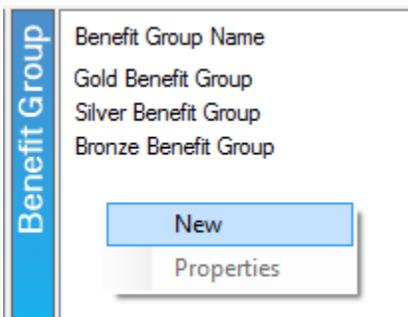
3. Open the **Blue Sales** folder that houses your **Membership** program.



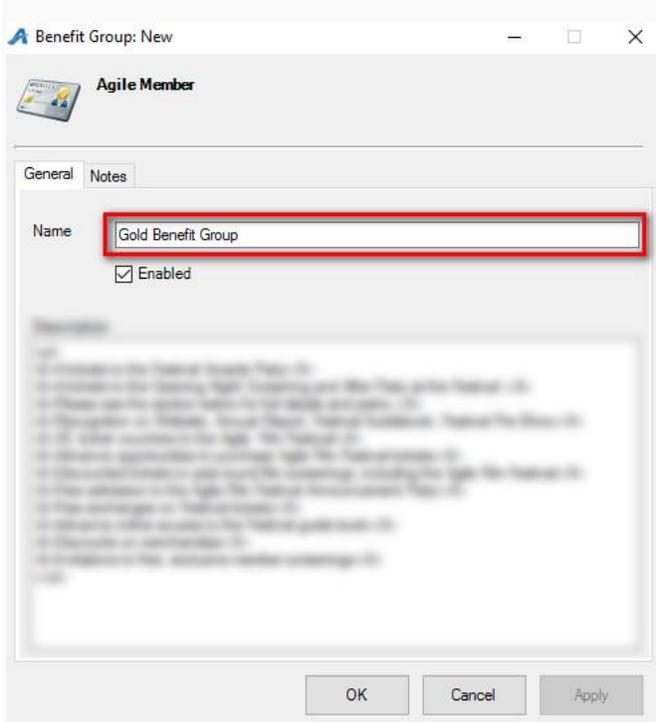
4. Click the **Benefit Group** icon.



5. Right-click in the **Benefit Group** area and select **New**.

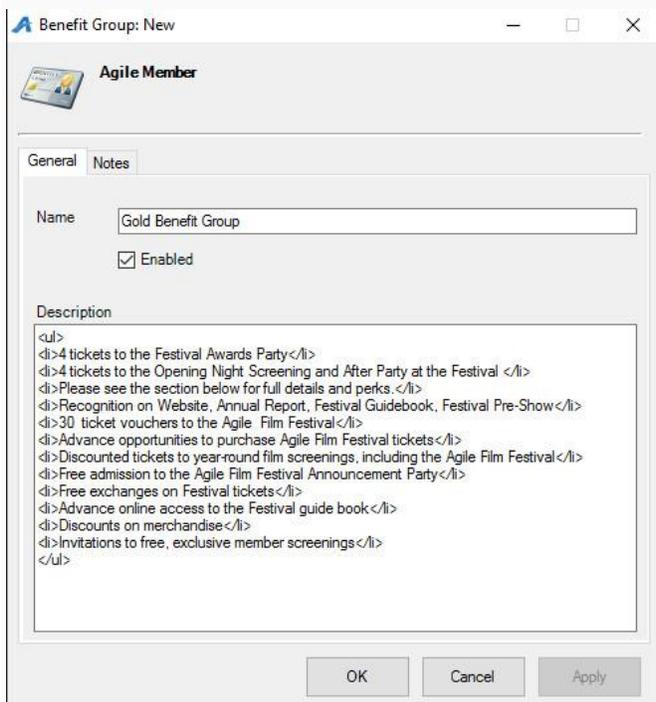


6. The **Benefit Group: New** window will open. In this window, you will need to name your Benefit Group. The benefit group should be named to match the Membership Price Level (i.e. VIP, Silver Level, Gold Level, etc.).



The screenshot shows a window titled "Benefit Group: New" with a sub-header "Agile Member". It has two tabs: "General" and "Notes". The "General" tab is active. The "Name" field contains the text "Gold Benefit Group" and is highlighted with a red border. Below the name field is a checked checkbox labeled "Enabled". The "Description" field is empty. At the bottom are buttons for "OK", "Cancel", and "Apply".

7. In the **Description** field, please enter the list of benefits that this **Membership Level** will receive. Information in this area will be merged onto the **Welcome Letters** that are sent with membership cards.



The screenshot shows the same "Benefit Group: New" window. The "Name" field still contains "Gold Benefit Group" and the "Enabled" checkbox is checked. The "Description" field is now filled with a list of benefits, each preceded by a diamond symbol (❖). The list includes: 4 tickets to the Festival Awards Party, 4 tickets to the Opening Night Screening and After Party, recognition on the website and in the Annual Report, 30 ticket vouchers, advance opportunities to purchase Agile Film Festival tickets, discounted tickets to year-round film screenings, free admission to the Agile Film Festival Announcement Party, free exchanges on Festival tickets, advance online access to the Festival guide book, discounts on merchandise, and invitations to free, exclusive member screenings. At the bottom are buttons for "OK", "Cancel", and "Apply".

8. Click **Apply** and **OK** to save this information.

9. When all Benefit Groups have been created, you will need to associate the Benefit Group Type with a corresponding **Membership Price Level**. Click **Membership** in the **Sales Organization Folder** for your membership program.



10. Highlight the **Membership** program.

| Membership Name | Sales Line Type | Expiration Type | Approval | ID Re |
|-----------------|-----------------|-----------------|----------|-------|
| AFF Membership | Membership | Sliding | False | False |

11. Right-click the **Membership Price** field. Select **New** if you are creating a new **Membership Price** or right-click and select **Properties** on an existing **Membership Price** to edit its Benefit Group. For more information on creating a new membership price, see [Adding a Membership Price](#).

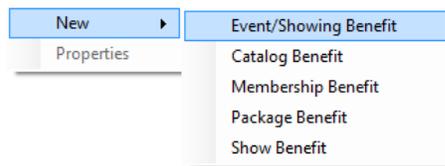
Member Benefits

Member Benefits allow an organization to set up specific permissions for a customer based on their specific membership level. These benefits can be based on Events, Shows, Catalogs, Memberships, or Packages.

1. Select the Benefit **Group** where you will be adding a benefit.

| Benefit Group Name | Enabled |
|----------------------|---------|
| Gold Benefit Group | True |
| Silver Benefit Group | True |
| Bronze Benefit Group | True |

2. In the Benefit area, right-click and select **New**. Choose the type of benefit you are creating.

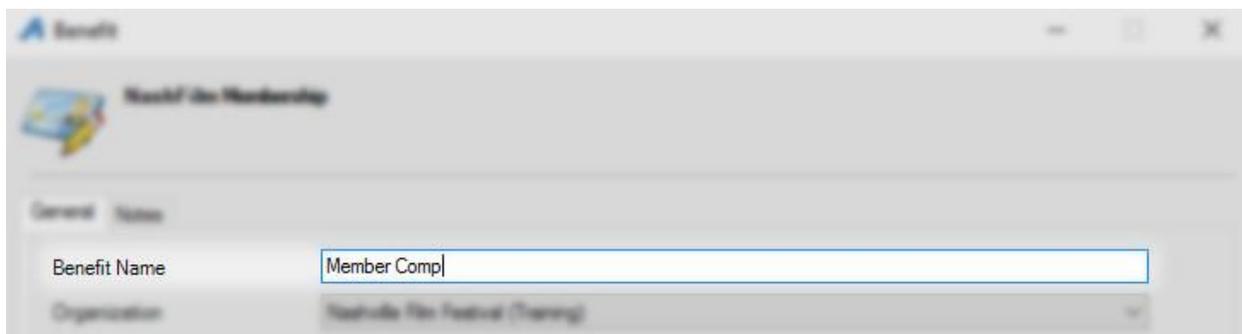


3. The following **Benefit** types can be selected:

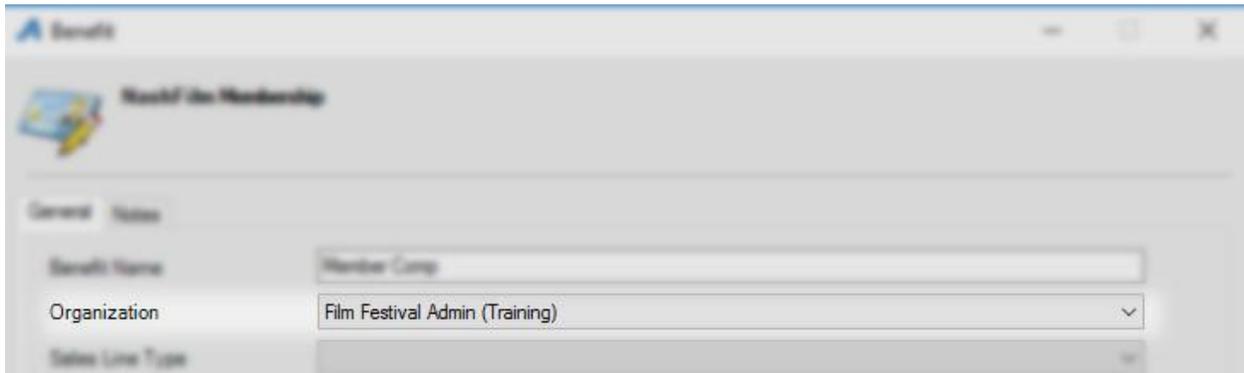
- **Event/Showing Benefit:** Allows you to choose a specific event(s) or showing(s) that the member can access with their membership level.
- **Catalog Benefit:** Allows the customer to have a specific benefit for specific items (i.e. Member T-shirts, Member Drink Discount, etc.).
- **Membership Benefit:** Generally used to access discounted memberships or passes.
- **Package Benefit:** Allows members to access specific packages, such as a Member Season Subscription package.
- **Show Benefit:** Allows the organization to restrict the member benefits to the entire run of a Show or Event (e.g. *Greatest Movie* is showing 10 times in the week, but the member can only select a single date for the entire run. Once they have selected an event in that run, they will not be able to choose another event).

For this example, we will be building an Event/Showing Benefit.

4. The **Benefit Window** will appear. In the **General Tab**, add a **Benefit Name** (i.e. Member Comp Benefit, Member Discount, etc.).

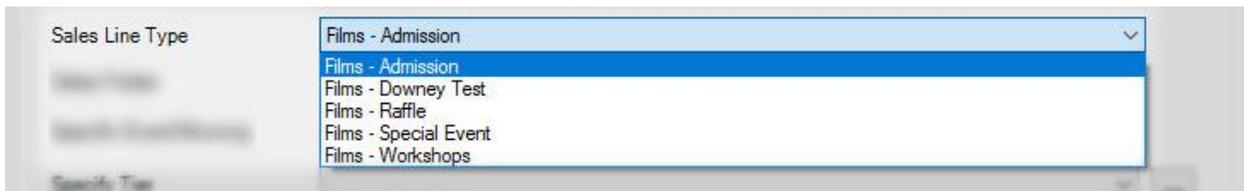


5. Next, select the **Organization**.



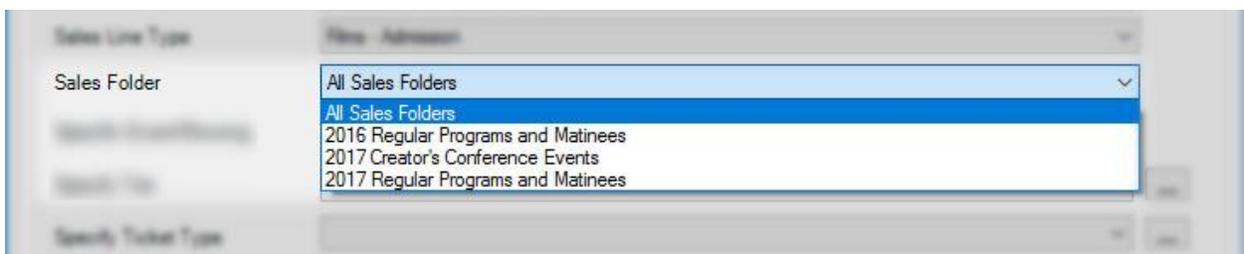
The screenshot shows a software window titled "Benefit" with a sub-header "Benefit for Membership". Below this, there are several input fields. The "Benefit Name" field contains "Member Camp". The "Organization" dropdown menu is open, showing "Film Festival Admin (Training)" as the selected option. Other fields like "Sales Line Type" are partially visible but not fully shown.

6. Select the **Sales Line Type**. **NOTE:** If you have different **Sales Line Types**, it is very important to select the correct Sales Line Type in order for the benefit to work correctly.



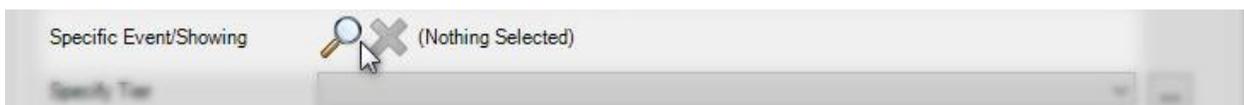
The screenshot shows a dropdown menu for "Sales Line Type". The menu is open, displaying a list of options: "Films - Admission" (highlighted), "Films - Admission", "Films - Downey Test", "Films - Raffle", "Films - Special Event", and "Films - Workshops".

7. Next, you will need to select the **Sales Folder** where events for this benefit are located. **NOTE:** If your member benefits are the same for all events, then leave the default selected as **All Sales Folders**.

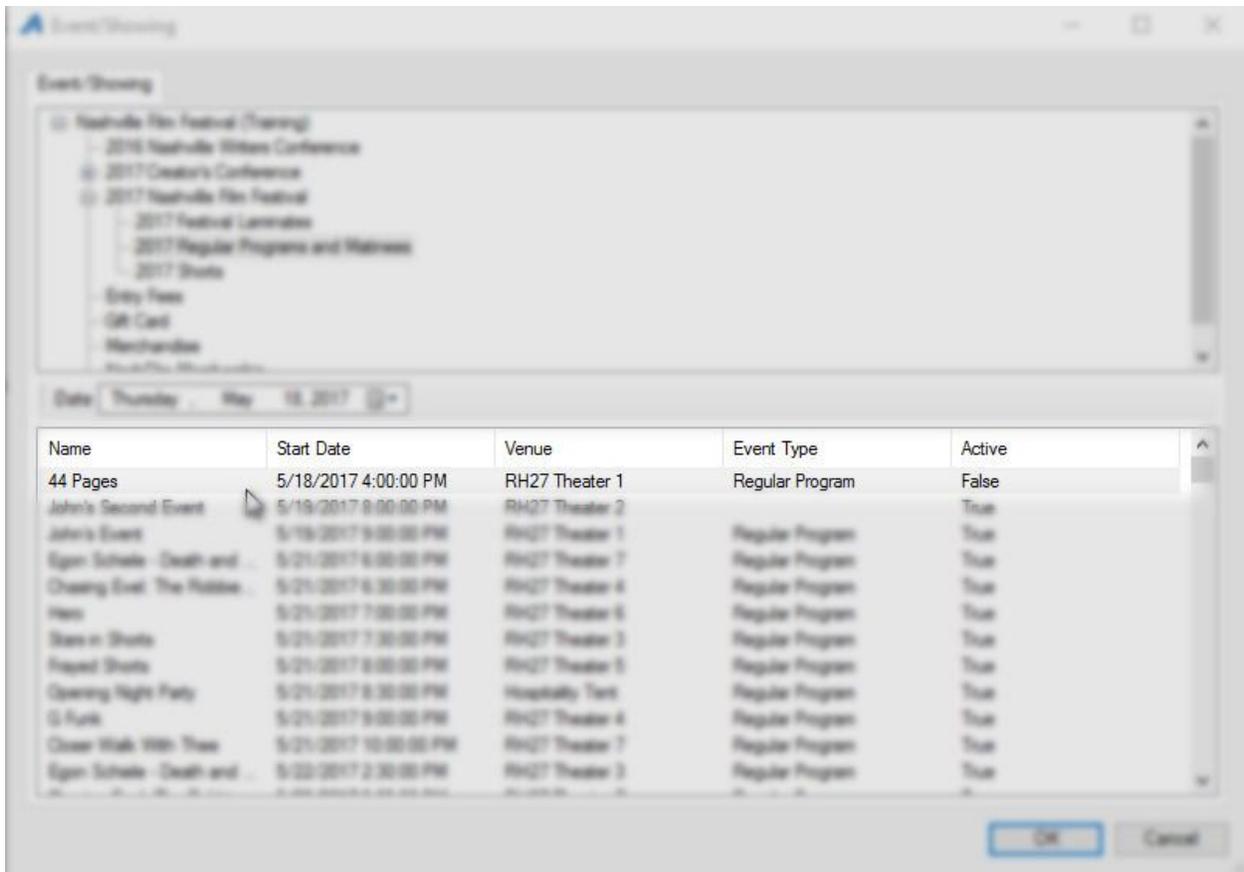


The screenshot shows a dropdown menu for "Sales Folder". The menu is open, displaying a list of options: "All Sales Folders" (highlighted), "All Sales Folders", "2016 Regular Programs and Matinees", "2017 Creator's Conference Events", and "2017 Regular Programs and Matinees".

8. If this benefit is for a **Specific Event/Showing**, click the **Magnifying Glass** icon and select the specific **Event** for this benefit. If all **Events/Showings** are available for this benefit, leave the **Nothing Selected** default.

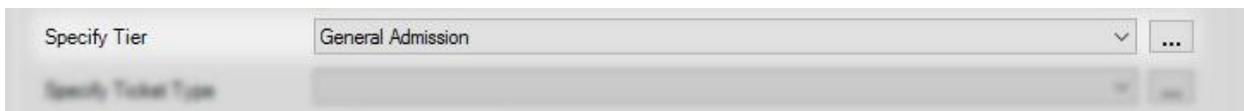


The screenshot shows a field for "Specific Event/Showing". To the left of the field is a magnifying glass icon and a close button (X). The text "(Nothing Selected)" is displayed next to the icon. Below the field is a "Specify Tier" dropdown menu.



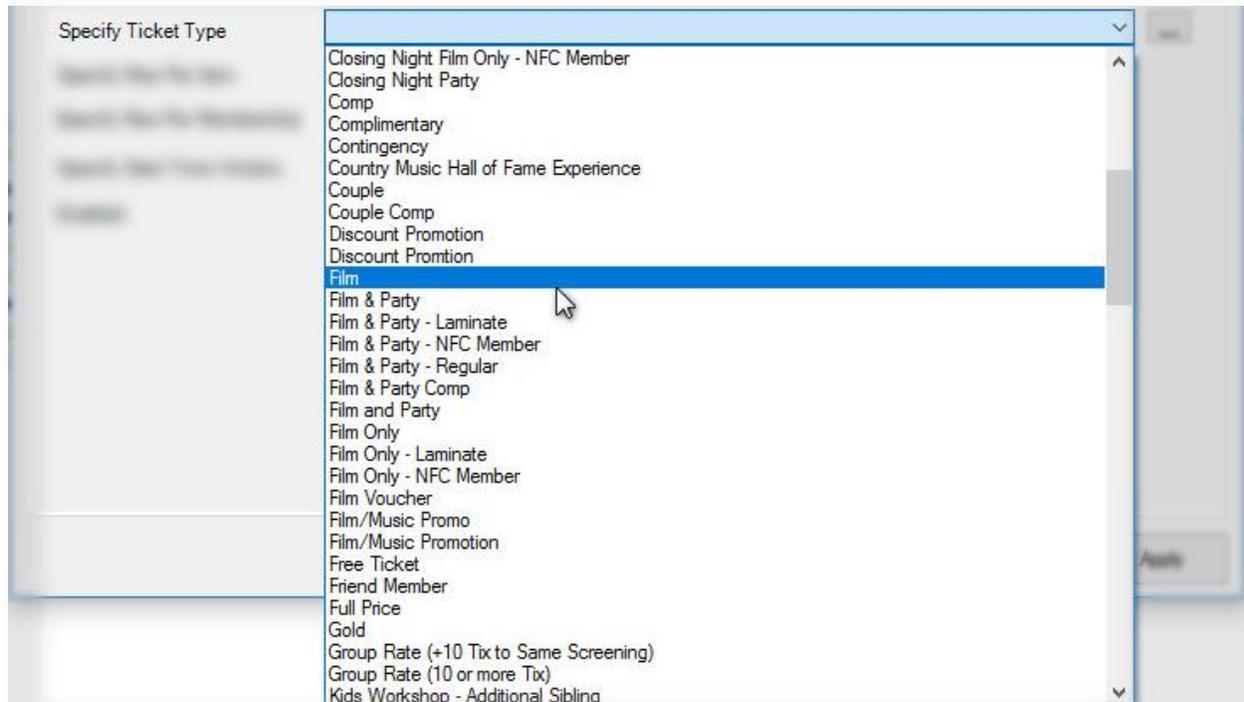
NOTE: You can remove the specific event by clicking the **Red X** icon.

9. Specify Tier from the drop-down menu.



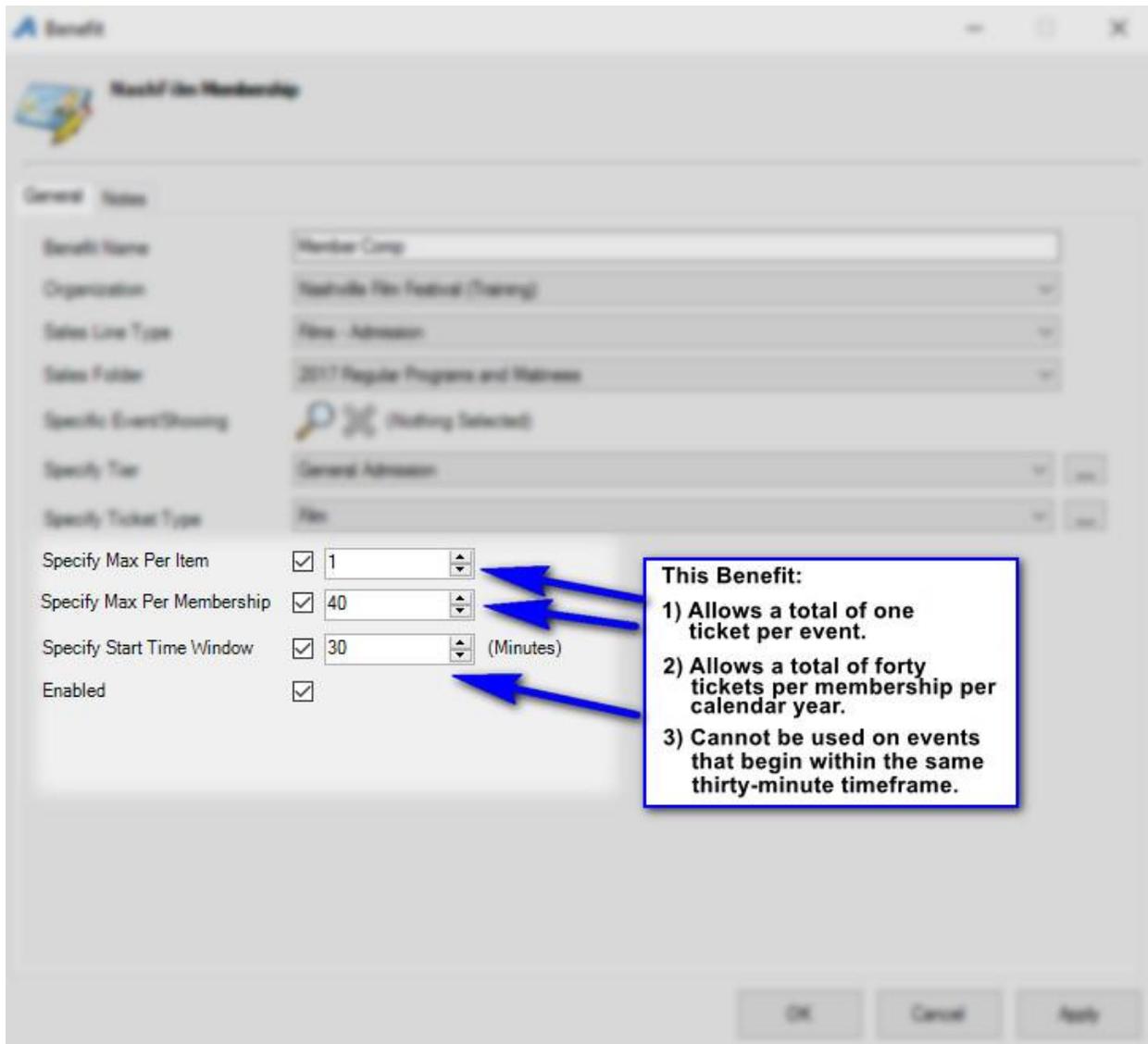
10. From the drop-down, **Specify Ticket Type**.

NOTE: If you do not select the correct ticket type for this benefit, then the benefit will be open-ended and allow anyone to access this benefit.



11. Next, you will set up your restrictions.

- **Specify Max Per Item** - This allows you to restrict the number of tickets the member can get per Event.
- **Specify Max Per Membership** - This allows you to restrict the total number of tickets a member can get in a calendar year.
- **Specify Start Time Window** - This restricts the member from using this benefit for multiple events that begin within the same 30-minute window. (e.g. If a customer uses this benefit to buy a ticket to *The Good Movie* at 11:30 AM, they will not be able to use the benefit on *The Best Movie* at 11:45 AM on the same day.)



12. In the **Brief Description**, you can describe the benefit the customer has and enable them to see how many benefits they have left in their membership. This description will appear on the customer's **My Benefits** page in their online account.

Please note that in order for this field to work properly, you must enable and specify the Max Per Item, Max Per Membership, or Start Time Window.

Benefit

Sandcastle Membership 2375

General Notes

Benefit Name: Discount Tickets

Organization: Agile Demo Sandbox

Sales Line Type: Event - Admission

Sales Folder: Films

Specific Event/Showing: (Nothing Selected)

Specify Tier: General Admission

Specify Ticket Type: Adult

Specify Max Per Item: 1 (%maxitem%)

Specify Max Per Membership: 50 (%maxtotal%, %ordered%, %remain%)

Specify Start Time Window: 30 (Minutes) (%window%)

Brief Description: Used:%ordered% Remaining: %remain%
[e.g. Up to %maxitem% per item for a total of %maxtotal%]

Enabled:

OK Cancel Apply

The text within each set of parentheses provides the phrase that, when used in the Brief Description, will display a facet of this benefit in members' account area online.

Note: All characters within percentage signs MUST be lowercase in order to display properly online.

13. Once completed, click **Apply** to save the benefit and **OK** to close the window.

OK Cancel Apply

We recommend that once you have set up the benefit(s), you go online or in AMS to test that the benefits are working properly.