

# ChamberMaster/MemberZone Benefit Tracking

# Agenda

Introduction to Benefit Tracking

Setup Benefit Packages

Assign Benefit Packages

Manage Benefit Packages

# Introduction



Pro Edition of the ChamberMaster/MemberZone software provides an easy and efficient way for you to track member benefits, such as free or discounted admission to certain events or free/discounted usage of facilities or other tangible items as part of their membership.

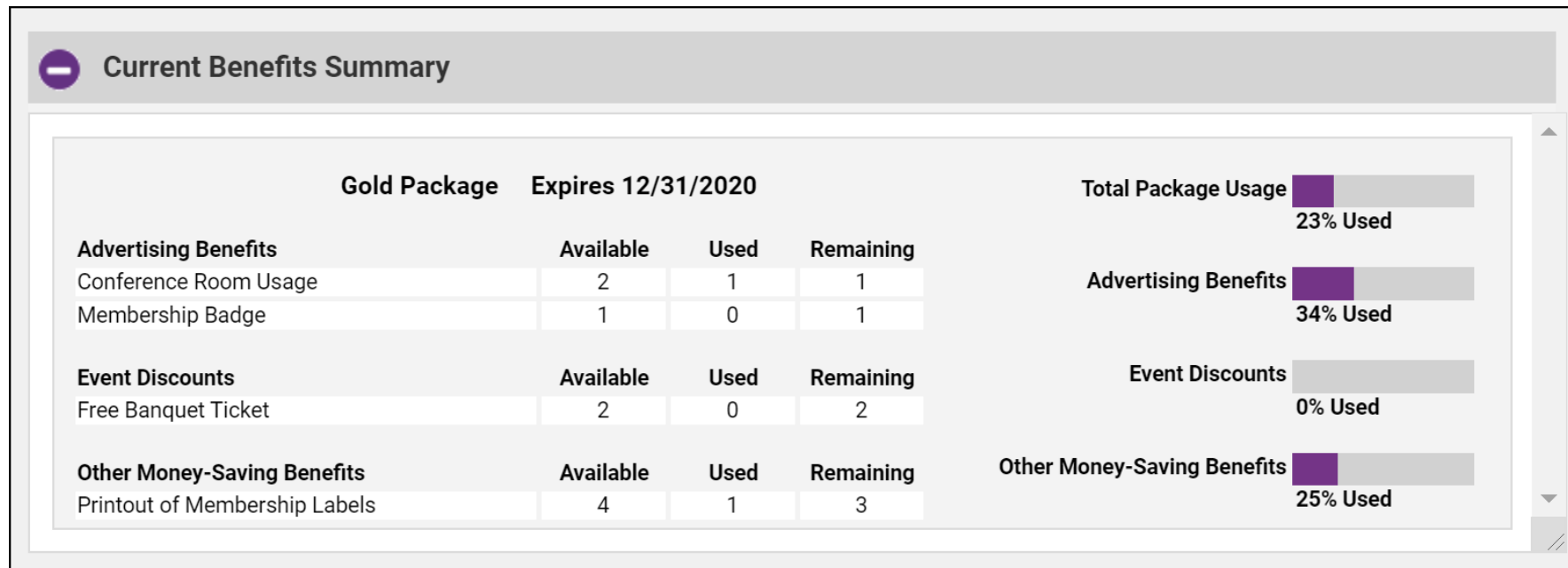
NOTE: If you have Plus or Premier Edition, the Benefit Tracking Module can be added on. Contact [engagement@growthzone.com](mailto:engagement@growthzone.com) for further information

## Why Use Benefit Tracking?

1. Allow associations to offer tailored benefits to members by type or even to each individual. i.e. tiered dues
2. Provides a way to give members exactly what they want from being a member and reinforces your value to members by offering them tailored membership benefits.
3. A natural way to put your association in front of members throughout the year through a reminder of their remaining benefits to use i.e. you have benefits to spend
4. No additional spreadsheet needed for tracking their benefits.
5. Events ticket counts automatically tracked across multiple events.
6. Members don't need to remember to use their event benefits. As long as they login, it will tell them if available. Hint: Using event invitations will automatically log them in for registration

# Setup Benefit Tracking

- Setup Benefit Packages
- Setup Benefit Items
- Setup Benefit Categories



# Define Benefit Packages

Setup > Setup Benefit Packages > New Benefit Package

WIKI: [Setup Benefit Packages](#)

Benefit Package Details

Package Name:

? Description:

Status:

Active

Show inactive benefit items

Benefit Items List

Quantity	Item Name	Description	Category	Type
<input type="checkbox"/>	<a href="#">1/2 Page Ad in Annual Directory</a>		Advertising Benefits	Standard
<input type="checkbox"/>	<a href="#">1/4 page add in the Monthly Newslett...</a>		Advertising Benefits	Event
<input type="checkbox"/>	<a href="#">Conference Room Rental</a>		Other Money-Saving Benefits	Standard
<input type="checkbox"/>	<a href="#">Free Use of Conference Room</a>		Facility Use Benefits	Standard
<input type="checkbox"/>	<a href="#">Set of Mailing Labels Annually</a>		Advertising Benefits	Standard
<input type="checkbox"/>	<a href="#">Tickets to Annual Gala</a>	2 Tickets to the Annual Gala	Event Discounts	Event

Save & Exit

New Benefit Item

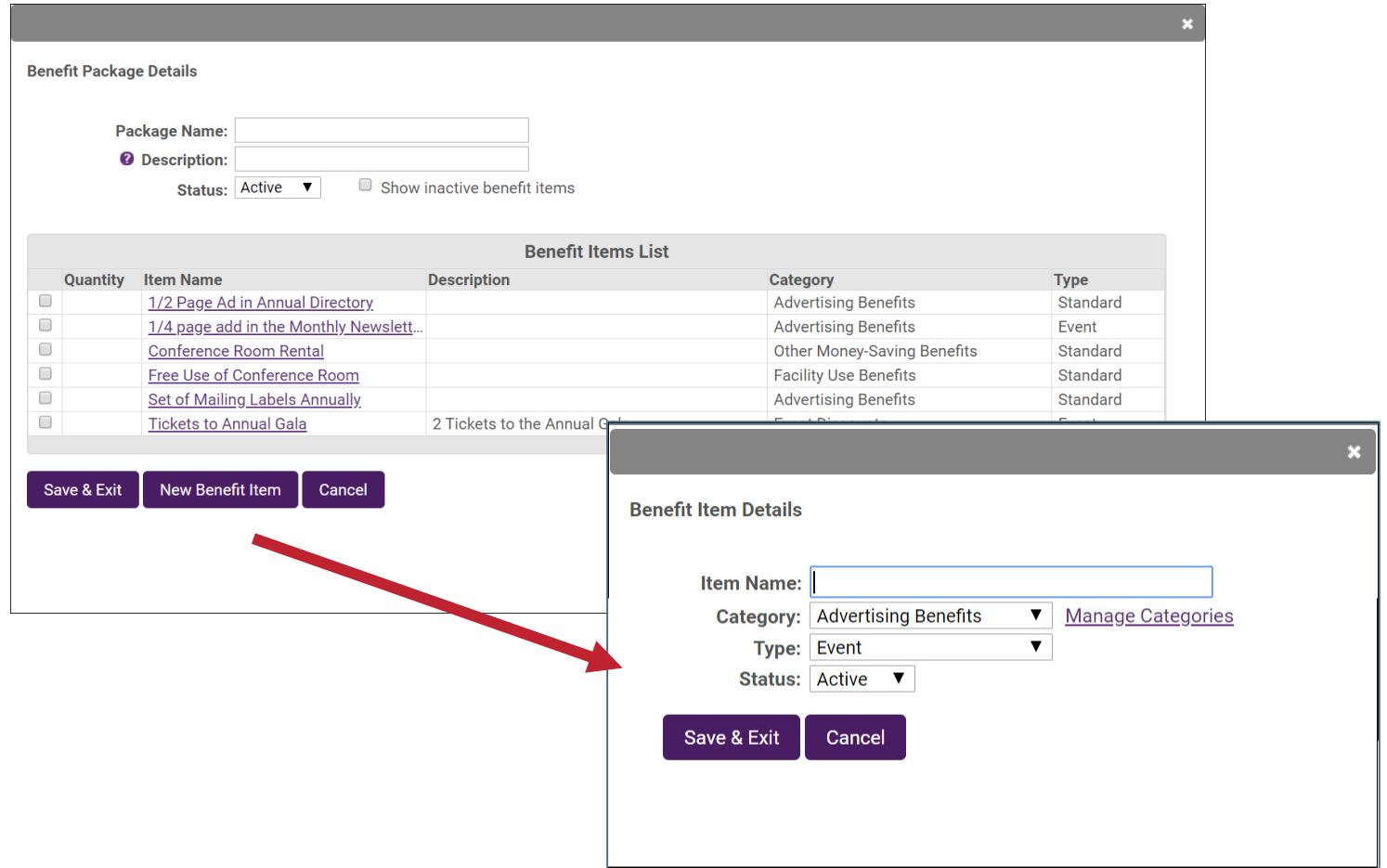
Cancel

# Define Benefit Items

Within a Benefit Package,  
click **New Benefit Item**

- Categories are a way to organize your benefits
- Type will drive whether the benefit item is used for an event or standard use

WIKI: [Add New Benefit Items](#)



**Benefit Package Details**

Package Name:   
Description:   
Status: Active ☐ Show inactive benefit items

Benefit Items List				
Quantity	Item Name	Description	Category	Type
<input type="checkbox"/>	<a href="#">1/2 Page Ad in Annual Directory</a>		Advertising Benefits	Standard
<input type="checkbox"/>	<a href="#">1/4 page add in the Monthly Newslett...</a>		Advertising Benefits	Event
<input type="checkbox"/>	<a href="#">Conference Room Rental</a>		Other Money-Saving Benefits	Standard
<input type="checkbox"/>	<a href="#">Free Use of Conference Room</a>		Facility Use Benefits	Standard
<input type="checkbox"/>	<a href="#">Set of Mailing Labels Annually</a>		Advertising Benefits	Standard
<input type="checkbox"/>	<a href="#">Tickets to Annual Gala</a>	2 Tickets to the Annual Gala	Event	Event

Save & Exit New Benefit Item Cancel

**Benefit Item Details**

Item Name:   
Category: Advertising Benefits [Manage Categories](#)  
Type: Event  
Status: Active  
Save & Exit Cancel

# Benefit Packages

## WIKI: [Copy a Benefit Package](#)

Benefit Packages List		
Package Name	Description	
<a href="#">Bronze Package</a>	Bronze Package	<a href="#">Copy</a>
<a href="#">Gold Package</a>	Benefits for Gold Members	<a href="#">Copy</a>
<a href="#">Silver Package</a>	Benefits for Silver Members	<a href="#">Copy</a>
<a href="#">New Benefit Package</a>		

**Best Practice:** The copy function will also be useful in creating different packages each year. We do not recommend that you simply adjust an existing package if you wish to introduce changes from year to year. **We recommend that you create a new package vs. editing an existing package.**

# Benefit Packages

**Add/Remove a Benefit Item to an Existing Benefit Package** (and cascade to members who have already been assigned the benefit package)

Benefit Package Details

Package Name: Gold Membership Package

Description:

Status: Active

Show inactive benefit items

Show only items selected for this package

Benefit Items List			
Quantity	Item Name	Category	Type
<input checked="" type="checkbox"/> 1	<a href="#">1/2 Page Ad in Annual Directory</a>	Advertising Benefits	Standard
<input checked="" type="checkbox"/> 1	<a href="#">1/4 page add in the Monthly Newsletter (1x)</a>	Advertising Benefits	Event
<input type="checkbox"/>	<a href="#">Conference Room Rental</a>	Other Money-Saving Benefits	Standard
<input checked="" type="checkbox"/> 1	<a href="#">Free Use of Conference Room</a>	Facility Use Benefits	Standard
<input checked="" type="checkbox"/> 1	<a href="#">Set of Mailing Labels Annually</a>	Advertising Benefits	Standard
<input checked="" type="checkbox"/> 1	<a href="#">Tickets to Annual Gala</a>	Event Discounts	Event

Save & Exit

New Benefit Item

Cancel

WIKI: [Add/Remove Benefit from Existing Package](#)

# Assign Benefit Package to Members

In Bulk: Setup > Setup Benefit Tracking > Assign Benefit Packages

WIKI: [Assign Benefit Package to Members – In Bulk](#)

Benefit Packages

Setup BenefitsAssign Benefit Packages

Assign Benefit Packages to multiple members at once.  
1. Select the members you wish to assign packages to  
2. Review the resulting list and select the desired package and other details i.e. package name, start and end date  
3. When all member assignments are set as desired in the list, then click Assign Packages

1. Select Members

Membership Type: Diamond Membership ▼  
Membership Status: Active ▼  
Renewal Month: - Any - ▼  
Join Date Start:   
Join Date End:   
Only those with no current active package ☒  
Load/Refresh

3. Assign Packages

Members Selected: 5  
Packages to be Assigned: 0  
Assign Packages Now

2. Select Package Assignments

Member Name	Membership Type	Renewal Month	Current Active Package(s)	Join Date	Set All Packages to Assign	Set All Package Names	Set All Start Dates	Set All End Dates	
					- Select a Package - ▼				
FirstPage Marketing	Diamond Membership	February		3/12/2018	- None - ▼				X
The Lobster Shack	Diamond Membership	February		4/25/2018	- None - ▼				X
DJ Entrprises	Diamond Membership	August			- None - ▼				X
Pasta's Restaurant	Diamond Membership	September		9/18/2018	- None - ▼				X
Dahlia's	Diamond Membership	July		11/26/2018	- None - ▼				X

# Assign Benefit Package to Members

Individually: From the Member's Benefit Tracking tab

WIKI: [Assign Benefit Packages to Members Individually](#)

Benefit Packages

Assigned Benefit Packages

check all  
uncheck all

Benefit Package

Status

Starts

Expires

There are no packages assigned to this member. Click "Assign Benefit Package" to add one now

Disable Selected Packages

Remove Selected Packages

Assign Benefit Package

Assign a Package

Package: Gold Membership Package

Name: Gold Membership Package

Start Date (Optional):

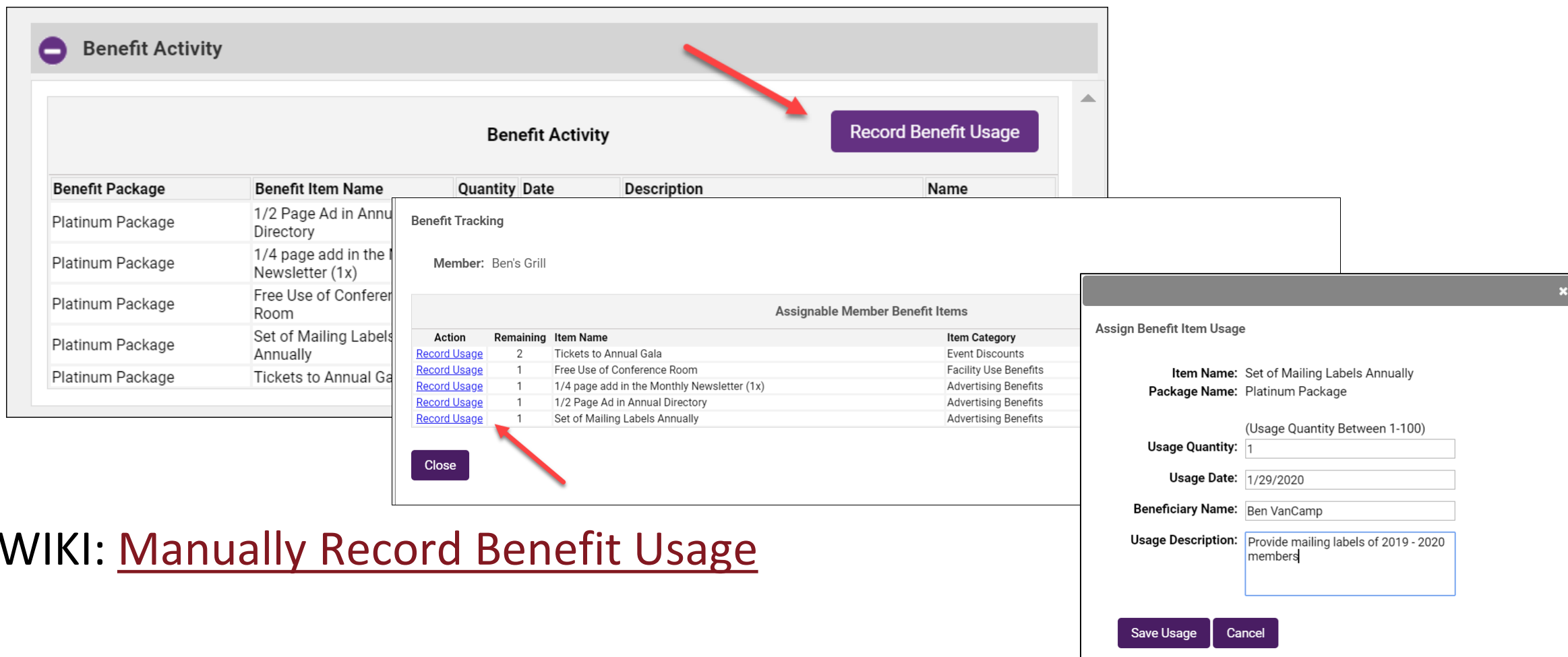
Expiration Date (Optional):

Cancel

Assign

# Track Standard Benefits

Standard Benefits are manually tracked on the member's Benefit Tracking tab



The screenshot displays the 'Benefit Activity' interface. At the top, there is a 'Benefit Activity' header with a minus icon and a 'Record Benefit Usage' button. Below this is a table with columns: Benefit Package, Benefit Item Name, Quantity, Date, Description, and Name. The table lists five entries for 'Platinum Package' with various benefit items. A red arrow points from the 'Record Benefit Usage' button to a modal window titled 'Assign Benefit Item Usage'.

The modal window contains the following information:

- Item Name:** Set of Mailing Labels Annually
- Package Name:** Platinum Package
- Usage Quantity:** 1 (Usage Quantity Between 1-100)
- Usage Date:** 1/29/2020
- Beneficiary Name:** Ben VanCamp
- Usage Description:** Provide mailing labels of 2019 - 2020 members

At the bottom of the modal are 'Save Usage' and 'Cancel' buttons.

**Benefit Activity Table:**

Benefit Package	Benefit Item Name	Quantity	Date	Description	Name
Platinum Package	1/2 Page Ad in Annual Directory				
Platinum Package	1/4 page add in the Newsletter (1x)				
Platinum Package	Free Use of Conference Room				
Platinum Package	Set of Mailing Labels Annually				
Platinum Package	Tickets to Annual Gala				

**Assign Benefit Item Usage Modal:**

**Item Name:** Set of Mailing Labels Annually  
**Package Name:** Platinum Package

**Usage Quantity:** 1 (Usage Quantity Between 1-100)  
**Usage Date:** 1/29/2020  
**Beneficiary Name:** Ben VanCamp  
**Usage Description:** Provide mailing labels of 2019 - 2020 members

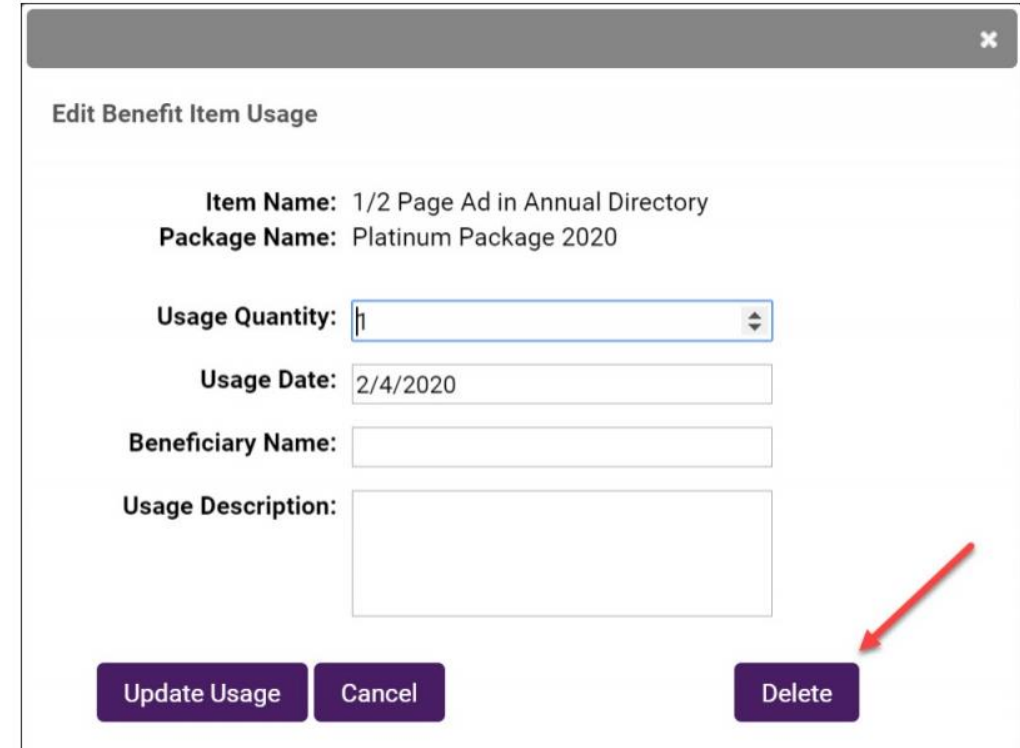
**Buttons:** Save Usage, Cancel

WIKI: [Manually Record Benefit Usage](#)

# Manage Benefit Usage

Delete a benefit usage: your staff has incorrectly recorded a benefit usage, you have the ability to delete the benefit usage item

WIKI: [Delete a Benefit Usage](#)



The screenshot shows a web form titled "Edit Benefit Item Usage" with a close button (X) in the top right corner. The form contains the following fields:

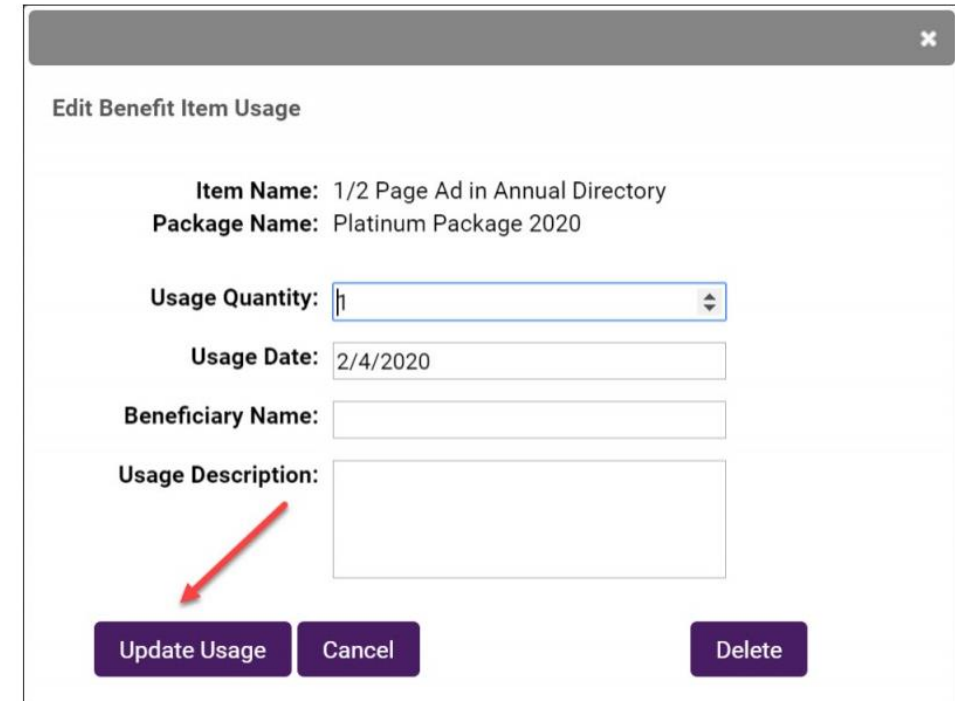
- Item Name:** 1/2 Page Ad in Annual Directory
- Package Name:** Platinum Package 2020
- Usage Quantity:** A dropdown menu with the value "1" selected.
- Usage Date:** 2/4/2020
- Beneficiary Name:** An empty text input field.
- Usage Description:** A large empty text area.

At the bottom of the form, there are three buttons: "Update Usage", "Cancel", and "Delete". A red arrow points to the "Delete" button.

# Manage Benefit Usage

Edit a Benefit Usage: your staff has incorrectly recorded a benefit usage, you have the ability to update/edit the usage

WIKI: [Edit a Benefit Usage](#)



**Edit Benefit Item Usage**

**Item Name:** 1/2 Page Ad in Annual Directory  
**Package Name:** Platinum Package 2020

**Usage Quantity:**

**Usage Date:**

**Beneficiary Name:**

**Usage Description:**

**Update Usage** **Cancel** **Delete**

# Track Event Benefits

If benefits that you provide your member include free or discounted event registrations, you can automate the tracking process by creating a **Benefit Item Discount** for your event.

Benefit Item Discount ?					
<a href="#">check all</a> <a href="#">clear all</a>		Benefit Item	Description	Applies To	Amount
<input type="checkbox"/>	<a href="#">Tickets to Annual Gala</a>		Platinum Package Benefit	Gala Registration - Members	\$75.00 off
<a href="#">Remove Selected Items</a>				<a href="#">Add Benefit Item</a>	

### Edit Event Discount

Benefit Item: Tickets to Annual Gala

Apply To: Gala Registration - Members (\$75.00)

Value/Amount: ☐ Use a Flat fee amount of \$  ☐ Reduce fee amount by \$  ☒ Reduce fee amount by  %

Description: Platinum Package Benefit

[Save](#) [Close](#)





WIKI: [Automate Event Benefit Usage Tracking](#)


## How it Works...

- When a member has the event benefit item included, during registration a Benefit Item drop-down will be displayed.
- When the benefit is used, the benefit tracking will automatically be updated on the members record.

# Track Event Benefits

Attendees

First Name	Last Name	Company	Email	Choose one	<a href="#">Pricing Details</a>	Total
<input type="text" value="Tracy"/>	<input type="text" value="Hall"/>	<input type="text" value="Ben's Brewery"/>	<input type="text" value="tracyt@mailinator.com"/>	<input type="text" value="Gala Registration - Members"/>		75.00  
<input type="text" value="Mary"/>	<input type="text" value="Hall"/>	<input type="text" value="Ben's Brewery"/>	<input type="text" value="ben@mailinator.com"/>	<input type="text" value="Gala Registration - Members"/>		75.00  

Add Attendee Add Multiple Attendees 

Sub-Total Amount:

\$150.00

Discounts:

Tickets to Annual Gala

- \$150.00

Total Discount:

\$150.00


\*Total Discount Applied:

- \$150.00

Total Amount:

\$0.00

\*All discounts will be

 Benefit Activity

Benefit Activity

Record Benefit Usage

Benefit Package	Benefit Item Name	Quantity	Date	Description	Name
Platinum Package	Tickets to Annual Gala	1	1/29/2020	Annual Gala 2020 RegID: 1330	Tracy Hall
Platinum Package	Tickets to Annual Gala	1	1/29/2020	Annual Gala 2020 RegID: 1330	Mary Hall
Platinum Package	1/2 Page Ad in Annual Directory	1	1/29/2020	Benefit Item(s) Added	
Platinum Package	1/4 page add in the Monthly Newsletter (1x)	1	1/29/2020	Benefit Item(s) Added	
Platinum Package	Free Use of Conference Room	1	1/29/2020	Benefit Item(s) Added	
Platinum Package	Set of Mailing Labels Annually	1	1/29/2020	Benefit Item(s) Added	
Platinum Package	Tickets to Annual Gala	2	1/29/2020	Benefit Item(s) Added	

# Manage Packages when Dropping Members

When a member is dropped you will have the option to disable the Benefit Package


WIKI: [Disable a Benefit Package on Member Drop](#)

Benefit Packages	
Package	Package Status
Platinum Package 2020 (Platinum Package)	Set as Disabled ▼

# Benefit Tracking Report

The **Benefit Tracking Report** can be used to review your members' current benefit packages and usage

WIKI: [Reporting Benefit Usage](#)

Member Benefits Report				
				
Package / Members	Benefit Item	Quantity Assigned	Quantity Used	Quantity Remaining
<b>Bronze Package</b>				
Lake Home Hunter Realty	Printout of Membership Labels	1	0	1
	Membership Badge	1	0	1
	Free Banquet Ticket	1	0	1
		3	0	3
<b>Gold Package</b>				
Juniper Jellybeans	Conference Room Usage	2	0	2
	Printout of Membership Labels	4	0	4
	Membership Badge	1	0	1
		7	0	7

# Benefit Tracking Report

Event Discount Usage report,  
accessed from the Guest List  
provides usage for that specific  
event

WIKI: [Event Discount Usage](#)

### Event Discount Usage - Promo Codes, Membership Type & Benefit Items


Events (Use Select All when using optional date range): Annual Gala 2020 (2020-08-15) [Select All](#) / [Unselect All](#)

(Optional) Event Start Date Between:  ☒ None  
and:  ☒ None

Discount Type: Benefit Items Only  
Attendance: Show All  
Display: Detail

1 of 1 | Save as [PDF](#) [Excel](#) [Word](#) [CSV](#)

### Benefit Item Usage

  
NOVA VALLEY  
NISSWA, MN

#### Annual Gala 2020

#### Benefit Item Discounts

Tickets to Annual Gala					
Reg ID	First Name	Last Name	Fee	Amount	Usage
1329	Anna	Lange	Gala Registration - Members	0	1
1325	Debbie	Smith	Gala Registration - Members	0	1
1327	Gary	Janeson	Gala Registration - Members	0	1
1326	Hank	Jones	Gala Registration - Members	0	1
1333	Harry	Wilson	Gala Registration - Members	0	1
1332	Joan	Jett	Gala Registration - Members	0	1

Thank You!