MEMBER REQUIREMENTS

Refer to the Training Manual for definitions of *Member Types.*

IMPORTANT NOTE:

Your RAMCO system is pre-loaded with the major NRDS member types. You should only create new Member Types if you have other major classes of members that do NOT go to NRDS, such as MLS-only members.

Setting up a Member Type

1. Click on **Membership** in the lower, left navigation panel.

2. Click on **Member Types** in the Membership Setup menu in the left navigation menu.

3. On the Ribbon Toolbar, select **New.**
4. Enter a **Name, Type,** and **whether to display on portal** or **require license.** If displayed on the portal, contacts can apply as this type of member using the portal.
5. Enter additional information. (If you have created an Application Form, you can add it here)
6. Click **Save.**

Establish the Dues and Fees

1. Click on **Membership** in the left navigation panel.
2. Click on **Member Type** in the Membership Setup menu in the left navigation menu.
3. Click on the **name** of your Member Type.
4. Click **Application Fees** under the Setup menu in the left navigation panel.

5. Click **Add New Membership Application Fee** in the ribbon toolbar.

6. Enter **Name, Member Type, Display Name,** and **Duration Type** at minimum.
7. Select a product with the lookup.

IMPORTANT NOTE:

If you do not have a product for this application fee, use the lookup icon, then use **New** at the bottom of the window to create one. *Every fee in RAMCO must be tied to a 'Product'.* Don't forget to add a price list item for your product.

8. Select **Dues Option.** This will determine the amount of prorated dues someone will pay when joining as this type of member.

IMPORTANT NOTE:

You may want to create an additional Dues Option for secondary members joining the association. Your primary member dues option would include local, state and national dues, but the secondary dues option likely would have different prorated dues and fees.

IMPORTANT NOTE:

If you do not have a Dues Option to add, you should finish creating your Dues Cycle and Dues Schedules and return to this step.

9. Click **Save**

Add Membership Requirements

The membership requirement types are:

- Query: Requirements will be automatically completed when the application meets the criteria defined in the query associated with the requirement.
- Manual: Requirements will require a manual completion by staff. (ie: Present driver's license). Manual requirements are completed using the "Complete" workflow on the requirement in the member application.
- Order Paid: Requirement that fee has been paid. You should only have one of these.

1. Click on **Membership** in the left navigation panel.
2. Click on **Member Type** in the Membership Setup menu in the left navigation menu.
3. Click on the **name** of your Member Type.
4. Click **Requirements** under the Setup menu in the left navigation panel.
5. Click **Add New Membership Requirement** in the ribbon toolbar.
6. At minimum, add a **name** of your requirement and select the **member type** it is associated with.
7. Click **Save.**

IMPORTANT NOTE:

When someone applies for membership, these requirements must be met before the membership goes from "Provisional" to "Active".