

DFWTRN Bundle Administrator Guide

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- A membership bundle is a collection of members who are linked together and managed by one of their members – the bundle administrator. The bundle administrator is responsible for adding new members to the bundle.
- Bundle members share the same renewal date, status, and membership level. The entire bundle is charged a single membership fee, which is paid by the bundle administrator.
- Membership bundles are not given names but are represented by the names of their bundle administrators.

Creating a Membership Bundle

- DFWTRN or your site administrator may create a Corporate membership bundle for you.
- By default, whoever initiates the Corporate membership is the **Bundle Administrator**, but this can be changed from your profile.
- If you do not have a Corporate Account you can create your own Corporate Membership, just go to the DFWTRN membership page.

New Members - Follow the Instructions Below

Select membership level

* Mandatory fields

- * Membership level
- Corporate Member - \$250.00 (USD)**
Bundle (up to 15 members)
Subscription period: 1 year
Automatic renewal (recurring payments)
Owned by company, entitles at least 15 people from the firm to attend each meeting. Entitles Corporation to receive 15 Member Directories, ability to post jobs on DFWTRN website, member discounts on services. Membership is \$250.00. If a corporate member leaves that company, the membership is not transferable to a new company.
 - Individual Member - \$50.00 (USD)**
Subscription period: 1 year
Automatic renewal (recurring payments)
Owned by a person, transferable if you personally change companies. Entitles you to lower Monthly Luncheon price and free quarterly evening meetings as well as Member Directory, ability to post jobs on DFWTRN website, member discounts on items and services. Membership is \$40.00

Once you have the Corporate membership and are the Bundle Administrator, you can start adding bundle members to your account.

Adding Members to a Bundle

Adding members is the responsibility of the Bundle Administrator for a company

- A bundle administrator can add new members to the bundle or add existing DFWTRN contacts already in the system to their bundle.
- Click Add Member and Search to see if the contact is already in our system.
- You cannot add an existing “Paid” member to your bundle. If you need a Paid member added to your bundle, please email info@dfwtrn.org to assist in moving another “Paid” member to your corporate membership.

To add members to a bundle as the bundle administrator, follow these steps:

1. Log into the DFWTRN website.
2. Click your name or the **View profile** link to jump to your member profile.
3. Your profile, click the Membership tab in your **Profile** page, click the **Add member** button.

The screenshot shows a user profile page with several tabs: Contact details, Membership, Events, Donations, Email settings and log, Privacy, and Photos. The Membership tab is active. Below the tabs, there are two main sections: Membership and Bundle. The Membership section has buttons for Edit, Renew, and Suspend. The Bundle section has an Add member button. The Membership section displays: Membership level: Corporate Member; Membership status: Active; Member since: 15 Mar 2017; Renewal due on: 31 Dec 2020; Renewal date last: 08 Aug 2019 changed. The Bundle section displays: Role: Bundle administrator; Bundle limit: 15; Used so far: 2; Administrator: Bobby Byrd; Members: Alex Krahl.

4. Complete the membership application form on behalf of the person you want to add as a bundle member.
5. Click Save.
6. The new bundle member's record now appears. To return to your profile, click the Return to bundle list and your own profile link.

Editing Bundle Member Information

- The bundle administrator can modify a bundle member's profile from within the bundle administrator's profile. To modify a bundle member's profile, click the bundle member's name within the **Bundle summary** section of the bundle administrator's profile, then click the **Edit profile** button within the bundle member's profile.

Removing a Bundle Member

- Only a site administrator – not a bundle administrator – can remove a member from a bundle, by assigning the bundle member to a non-bundle membership level.
- But, a bundle administrator can archive a bundle member, so that the member is no longer part of the bundle, but still remains part of the site's contact database (though as an inactive contact).

Renewing a Membership Bundle

- All bundle members share the same renewal date. While bundle members may also receive renewal reminders and renewal notifications, only the bundle administrator can actually renew on behalf of the entire bundle.
- A renewal reminder will be emailed to the bundle administrator a certain number of days before the membership renewal date. The renewal reminder may include a link you can click to log into your account.
- Depending on the renewal options your site administrator chose when setting up the bundle, you may also receive an invoice for the membership fee. The invoice email may include a link you can click to view and pay the invoice without logging in.
- You can also renew your membership from your member profile.
- After you click the **Renew** button, you can review and update your membership details, then click the **Update and next** button. Then, you click the **Confirm** button to confirm the renewal request. You will be taken to the **Invoices and payments** page where you can pay for the invoice for the renewal. The membership fee is payable by the bundle administrator on behalf of the entire bundle.
- Once the bundle is renewed, renewal notifications are sent to individual bundle members.

Changing Bundle Administrators

- Only a site administrator can change the bundle administrator to another bundle member. After another member is made the bundle administrator, the previous bundle administrator becomes a regular bundle member.
- Email info@dfwtrn.org to request a change of a bundle administrator for your company.

Changing Bundle Levels

- A bundle administrator can switch their entire bundle to a different bundle level by clicking the **Change** option beside their membership level within their member profile.
- A bundle administrator can switch to an individual level only if their bundle has no members.
- Bundle members cannot switch to a different membership level as long as they are still members of a bundle. To switch a bundle member to a different level, first remove them from the bundle.