

Memberships Guide

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Introduction to Membership Programs



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From *Memberships*, you can manage your membership programs. You can also access membership-related reports and tasks.

There are three types of membership programs.

- Annual programs are for memberships of a specific length with an expiration date.
- Recurring (or sustaining) programs are for memberships with no expiration date as long as a set amount is paid on a recurring basis.
- Lifetime programs are for memberships with no expiration date as long as a set amount is paid in full within a specific timeframe.

In addition to the membership program types, you must determine how people obtain the membership: by payment of dues, by contributions above a certain level, or a combination of both. Revenue for dues-based memberships is typically reported as membership revenue and posts to ledger accounts specifically for memberships, whereas revenue for contributions-based memberships is typically reported and posts as contributions or donations. You might also have a membership program that is a hybrid of these. Lower levels may be dues-based, while some higher levels, like giving societies, may be awarded based on cumulative contributions.

Note: Currently, recurring and lifetime membership programs can be dues-based only, not contributions-based.

When you add a membership program, you complete a series of tabs with information about the program. As you make choices and enter information about the program, the tabs and fields change to reflect the information needed for the specific type of program.

Add a membership program

General Levels Benefits Dues Renewals Review

Program name: Category: None

Description:

What kind of membership program is this?

- Annual - For memberships of a specified length of time with an expiration date, such as annual membership programs and student membership programs
- Recurring/Sustaining - For memberships with no expiration date as long as a set amount is paid on a regular, specified basis such as \$10 a month
- Lifetime - For memberships with no expiration date as long as a specified amount is paid in full within a specified timeframe

How do people obtain this membership?

- Dues based - People pay for membership levels with dues
- Reported as membership revenue
- Posts to GL accounts specifically for membership
- Contributions based - People are awarded membership levels based on their contributions
- Reported as contributions revenue
- Posts to the same GL accounts as donations
- Both ways - Some levels are purchased and some are awarded

How many membership terms does your program have?

- One term year(s)
- Multiple terms

Do we have it right so far?

Based on the options you selected, your membership program looks like this:

	AMOUNT
XXXX	\$

- Define one term (such as 1 year...)
- Define any number of levels
- Define single amount

Help Previous Next Save Cancel

How to Set Up an Annual, One-Term Membership Program

When you add an annual membership program, you determine if there is only one set term or if multiple terms exist. For example, some annual programs are valid for one year. Other programs use multiple terms to keep members engaged for longer periods of time. If a single-term, one-year annual membership costs \$100, a two-year term for the same membership program may cost only \$170. The member saves money and gets a good deal and your organization has twice as long to build a relationship and interact with the member.

When you set up an annual, one-term membership program, you complete a series of tabs with information about the program. As you indicate whether the program is dues-based, contributions-based, or both, the tabs and fields change to reflect the information needed for the specific type of program.

This workflow walks through the setup of an annual, one-term membership program, along with the different tabs and fields you encounter along the way.

- Before you begin, consider whether your membership program is going to include any benefits or add-ons, as you can set these up in advance. Benefits include items given to the member when joining at a certain level, such as a key chain or calendar. Add-ons are items members can purchase in addition to the membership, without any impact to the membership level. For example, at any level, you might allow members to purchase an additional member or "plus one" for a guest. For more information, see [Membership Benefits on page 20](#) and [Membership Add-ons on page 39](#). Also consider whether you need to create a membership promotion, such as 20% off, to offer when someone purchases the membership. For more information, see [Membership Promotions on page 40](#).
- From *Memberships*, click **Add**. The Add a membership program screen appears. The first fields on the screen are for general information about the membership program, such as its name and description. For more information, see [General Information about the Membership Program on page 18](#).
- On the General tab, make key choices about the type of membership program you want to set up. This workflow is for an annual, one-term program. However, you can still choose whether membership in the program is based on dues, contributions, or both. This workflow covers all three scenarios. For more information about dues and contributions, see [Rules for Dues and Contributions on page 24](#).
 On the General tab, you can also enable the annual dues-based programs for auto-renewal. For more information, see ***
- On the Levels tab, set up the levels for your membership program. You need to have at least one level, but you can have multiple levels. For example, you might have a standard level as well as a premium one. When you enter your levels, begin with the lowest or most basic level first.
 For dues-based programs, each of your levels has one price. You can also specify the number of members, membership cards, and children allowed for each level.
 For contributions-based programs, you set minimum and maximum amounts for each level. The lowest level might be any gift under \$50, while other levels may be between \$50 and \$99, \$100 and \$249, and so on.
 If your program includes both, you specify how people obtain each level—whether it is purchased with dues or awarded with contributions. You then specify the amounts for each level accordingly.
 For more information about levels, see [Membership Program Levels and Terms on page 18](#).
- On the Levels tab, you can also specify add-ons for dues-based programs or levels. Contributions-based programs and levels do not use add-ons. Any additional benefit is a reason for a member to upgrade to a higher level rather than remain at a lower level and purchase the add-on. For more information about add-ons, see [Membership Add-ons on page 39](#).
- On the Benefits tab, select which format to use for your membership cards, along with the name format to use for members. In addition, you can indicate whether any portion of the membership amount is tax deductible. If the membership program has any benefits, you can assign those to levels on this tab. The benefits will be awarded when memberships are added. For more information, see [Membership Benefits on page 20](#).
- For a dues-based program, the Dues tab appears. For a contributions-based program, the Contributions tab appears. And if it has both, both tabs appear.
 On the Dues tab, you set rules for any membership dues received, such as tax deductibility. In addition, you can specify which promotions, if any, can be used when memberships are purchased. For information on these options, see [Rules for Dues-Based Programs and Levels on page 24](#).

On the Contributions tab, you set rules for any membership contributions received, including the types of giving activity that count toward a membership and what happens if someone gives more than the amount specified for a level. You also specify when the contributions-based membership expires. For information on these options, see [Rules for Contributions-Based Programs and Levels on page 25](#).

- On the Renewals tab for a dues-based program, specify whether the membership term varies based on the start date of the membership or based on a fixed date such as a calendar year. You also specify when dues-based levels expire.

To expire the memberships for the program on the same day and month every year, select **Is fixed** and enter the month and day in the **Expiration date** column. In the **Push to next period after** column, enter the membership join date that extends the membership until the next expiration date. For example, you enter 12/31 in the **Expiration date** column. If you enter 09/01 in the **Push to next period after** column, the expiration date for a constituent who joins on or after September 1 is December 31 of the following year, not the current year. You can enter multiple rows of dates in this grid if you want to expire and push multiple dates throughout the year.

Then on the Renewals tab for dues- and contributions-based programs, you set up the renewal window and determine how members' statuses change based on where they are in the window. For information about renewals, see [Manage Renewal Information for Membership Programs on page 27](#).

- The final tab is the Review tab. On this tab, you can select each level on the left and view information about the level on the right. If you need to make any changes to the information, you can click back through the tabs. Otherwise, click **Save**.

How to Set Up an Annual Membership Program with Multiple Terms

When you add an annual membership program, you determine if there is only one set term or if multiple terms exist. For example, some annual programs are valid for one year. Other programs use multiple terms to keep members engaged for longer periods of time. If a single-term, one-year annual membership costs \$100, a two-year term for the same membership program may cost only \$170. The member saves money and gets a good deal and your organization has twice as long to build a relationship and interact with the member.

When you set up an annual membership program with multiple terms, you complete a series of tabs with information about the program. As you indicate whether the program is dues-based, contributions-based, or both, the tabs and fields change to reflect the information needed for the specific type of program.

This workflow walks through the setup of an annual membership program with multiple terms, along with the different tabs and fields you encounter along the way.

- Before you begin, consider whether your membership program is going to include any benefits or add-ons, as you can set these up in advance. Benefits include items given to the member when joining at a certain level, such as a key chain or calendar. Add-ons are items members can purchase in addition to the membership, without any impact to the membership level. For example, at any level, you might allow members to purchase an additional member or "plus one" for a guest. For

more information, see [Membership Benefits on page 20](#) and [Membership Add-ons on page 39](#). Also consider whether you need to create a membership promotion, such as 20% off, to offer when someone purchases the membership. For more information, see [Membership Promotions on page 40](#).

- From *Memberships*, click **Add**. The Add a membership program screen appears. The first fields on the screen are for general information about the membership program, such as its name and description. For more information, see [General Information about the Membership Program on page 18](#).
- On the General tab, make key choices about the type of membership program you want to set up. This workflow is for an annual program with multiple terms. However, you can still choose whether membership in the program is based on dues, contributions, or both. This workflow covers all three scenarios. For more information about dues and contributions, see [Rules for Dues and Contributions on page 24](#).
- On the Terms and Levels tab, enter the terms for the program. Terms can be based on a number of months or years. Then set up the levels for the program. You need to have at least one level, but you can have multiple levels. For example, you might have a standard level as well as a premium one. When you enter your levels, begin with the lowest or most basic level first.
For more information about levels, see [Membership Program Levels and Terms on page 18](#).
- For dues-based programs, the Prices tab appears. Each of your levels has one price and you can also specify the number of members, membership cards, and children allowed for each level.
For contributions-based programs, the Price Ranges tab appears. You set minimum and maximum amounts for each level. The lowest level might be any gift under \$50, while other levels may be between \$50 and \$99, \$100 and \$249, and so on.
If your program includes both, you specify how people obtain each level—whether it is purchased with dues or awarded with contributions. You then specify the amounts for each level accordingly.
- On the Prices or Price Ranges tab, you can also specify add-ons for dues-based programs or levels. Contributions-based programs and levels do not use add-ons. Any additional benefit is a reason for a member to upgrade to a higher level rather than remain at a lower level and purchase the add-on. For more information about add-ons, see [Membership Add-ons on page 39](#).
- On the Benefits tab, select which format to use for your membership cards, along with the name format to use for members. In addition, you can indicate whether any portion of the membership amount is tax deductible. If the membership program has any benefits, you can assign those to levels on this tab. The benefits will be awarded when memberships are added. For more information, see [Membership Benefits on page 20](#).
- For a dues-based program, the Dues tab appears. For a contributions-based program, the Contributions tab appears. And if it has both, both tabs appear.
On the Dues tab, you set rules for any membership dues received, such as tax deductibility. In addition, you can specify which promotions, if any, can be used when memberships are purchased. For information on these options, see [Rules for Dues-Based Programs and Levels on page 24](#).
On the Contributions tab, you set rules for any membership contributions received, including the types of giving activity that count toward a membership and what happens if someone gives more than the amount specified for a level. You also specify when the contributions-based membership expires. For information on these options, see [Rules for Contributions-Based Programs and Levels on page 25](#).

- On the Renewals tab for a dues-based program, specify whether the membership term varies based on the start date of the membership or based on a fixed date such as a calendar year. You also specify when dues-based levels expire.

To expire the memberships for the program on the same day and month every year, select **Is fixed** and enter the month and day in the **Expiration date** column. In the **Push to next period after** column, enter the membership join date that extends the membership until the next expiration date. For example, you enter 12/31 in the **Expiration date** column. If you enter 09/01 in the **Push to next period after** column, the expiration date for a constituent who joins on or after September 1 is December 31 of the following year, not the current year. You can enter multiple rows of dates in this grid if you want to expire and push multiple dates throughout the year.

Then on the Renewals tab for dues- and contributions-based programs, you set up the renewal window and determine how members' statuses change based on where they are in the window. For information about renewals, see [Manage Renewal Information for Membership Programs on page 27](#).

- The final tab is the Review tab. On this tab, you can select each level on the left and view information about the level on the right. If you need to make any changes to the information, you can click back through the tabs. Otherwise, click **Save**.

How to Set Up a Recurring or Lifetime Membership Program

Recurring (or sustaining) programs are for memberships with no expiration date as long as a set amount is paid on a recurring basis. Lifetime programs are for memberships with no expiration date as long as a set amount is paid in full within a specific timeframe.

When you set up a recurring or lifetime membership program, you complete a series of tabs with information about the program.

Note: Currently, recurring and lifetime membership programs can be dues-based only, not contributions-based.

This workflow walks through the setup of a recurring or lifetime membership program, along with the different tabs and fields you encounter along the way.

- Before you begin, consider whether your membership program is going to include any benefits or add-ons, as you can set these up in advance. Benefits include items given to the member when joining at a certain level, such as a key chain or calendar. Add-ons are items members can purchase in addition to the membership, without any impact to the membership level. For example, at any level, you might allow members to purchase an additional member or "plus one" for a guest. For more information, see [Membership Benefits on page 20](#) and [Membership Add-ons on page 39](#). Also consider whether you need to create a membership promotion, such as 20% off, to offer when someone purchases the membership. For more information, see [Membership Promotions on page 40](#).
- From *Memberships*, click **Add**. The Add a membership program screen appears. The first fields on the screen are for general information about the membership program, such as its name and description. For more information, see [General Information about the Membership Program on page 18](#).

- On the General tab, make key choices about the type of membership program you want to set up. This workflow is for a recurring or lifetime program. These programs must be dues-based only. For more information about dues, see [Rules for Dues and Contributions on page 24](#).
- On the Payment Options/Levels tab, enter the payment options for the membership program. Recurring programs can have payment options of annually, semi-annually, quarterly, and monthly. Lifetime programs must be paid in full.
Next, on the Payment Options/Levels tab, set up the levels for the program. You need to have at least one level, but you can have multiple levels. For example, you might have a standard level as well as a premium one. When you enter your levels, begin with the lowest or most basic level first.
For more information about levels, see [Membership Program Levels and Terms on page 18](#).
- For recurring and lifetime programs, the Prices tab appears. Each payment option and level has a price.
For a recurring program with two levels and payment options of annually and quarterly, you set annual and quarterly-based prices for each level. For example, you might qualify for a recurring membership if you make quarterly payments of \$150 or slightly discounted annual payments of \$500.
Lifetime programs must be paid in full.
- On the Prices tab, you can also specify add-ons. Add-ons are items members can purchase in addition to the membership, without any impact to the membership level. For more information, see [Membership Add-ons on page 39](#).
- On the Benefits tab, select which format to use for your membership cards, along with the name format to use for members. In addition, you can indicate whether any portion of the membership amount is tax deductible. If the membership program has any benefits, you can assign those to levels on this tab. The benefits will be awarded when memberships are added. For more information, see [Membership Benefits on page 20](#).
- On the Dues tab, you set rules for any membership dues received, including tax deductibility and payment options. In addition, you can specify which promotions, if any, can be used when memberships are purchased. For information on these options, see [Rules for Dues-Based Programs and Levels on page 24](#).
- The final tab is the Review tab. On this tab, you can select each level on the left and view information about the level on the right. If you need to make any changes to the information, you can click back through the tabs. Otherwise, click **Save**.

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From *Memberships*, you can manage your membership programs. You can also access membership-related reports and tasks. Once you add a membership program, you can view and edit information about the program. From *Memberships*, click a membership program. The membership program page appears.

You can run the Update Membership Status global change to go through your membership programs and update the members' statuses automatically based on the rules for the renewal window for the programs. For more information, see [Manage Renewal Information for Membership Programs on page 27](#).

After you set up membership renewal notices, you can process them to generate the renewal notices to mail or email to constituents. Before you send membership renewal notices through email, we recommend you follow the email checklist to ensure proper email configuration. For information about email setup, see [Email Setup Checklist on page 54](#).

View Membership Program Information

From *Memberships*, in the **Membership Programs** grid, click the name of a membership program.

On the Membership program tab, you can view the total active memberships and any membership alerts, such as the number of cards waiting to be printed and the results of the renewal notices process. Depending on your security rights, you can also access items such as membership and renewal letter tasks and reports. If you click the "number of" link in the **Total active memberships** widget, the Membership Status page appears. For information about this page, see [View Current Membership Statuses on page 17](#).

On the Activity tab, widgets help you see information at a glance such as the number of renewals and rejoins, new memberships, lapsed memberships, and upgrades and downgrades. When you click on the "number of" link within a widget, the Widget Details page appears. When you click on the "view all levels" link within a widget, the Widget Level Summary page appears. You can change the widgets to display based on level or tier and set the date range from the **Show information** field. For information about the Activity Widget Details page, see [View Activity Widget Details on page 17](#).

On the Revenue tab, you can view revenue trends by level, which displays a line graph over a period of time based on the different membership levels. You can also view revenue by level, which displays a bar graph of total revenue over the selected time period. For information about the Membership revenue report, see [Membership Dues Revenue Report on page 109](#).

View Current Membership Statuses

When you click the "number of" link in the **Total active memberships** widget on the Membership program tab, the Membership Statuses page appears. This page provides a list of members based on status selected in the **Status** filter. You can view the primary member, level, and expiration date. You can also view whether the membership was a gift and who gave the gift. If you click the name of a primary member, the Constituent Membership page appears. For information about the Constituent Membership page, see [Edit Membership Details on page 62](#).

Note: You can filter the items on this page by level and tier.

View Activity Widget Details

When you click the "number of" link within a widget on the Activity tab, the Widget Details page appears. This page displays information about your members such as primary member name, level, tier, and expiration date. This information is based on the selected date range. However, the **Current status** column displays a member's present status, regardless of date range. You can also view whether the membership was a gift and who gave the gift. If you click the name of a primary member, the Constituent Membership page appears. For information about the Constituent Membership page, see [Edit Membership Details on page 62](#).

Note: This page displays all membership information based on the widget and the widget displays only up to five levels of membership information.

General Information about the Membership Program

When you set up a membership program, you indicate whether it is an annual, recurring, or lifetime program. You also indicate whether it is dues-based, contributions-based, or both. Once saved, you cannot edit these settings for the program. On the General tab on the membership program view, you can edit other information about the program, such as its name and description.

For information about the different types of programs, as well as how to set them up, see [Introduction to Membership Programs on page 8](#).

Edit General Membership Program Information

After you add a membership program, you can edit the general information about program including its name, description, and category.

When you create a membership program, you indicate if it is annual, recurring, or lifetime, as well as whether the program is dues-based, contributions-based, or both. Once saved, you cannot edit this information about the membership program.

To view a membership program, from *Memberships*, click the membership program name. The membership program page appears. On the General tab, click **Edit**.

Screen Item	Description
Name	This is the name of membership program, such as "Adopt an Animal" or "Alumni Association."
Description	Enter a description for the membership program to include additional information and details about the program.
Category	Select a category for the program, such as "Museum" or "Alumni Association." This can help you analyze membership programs based on category.
Allow multiple memberships	If a constituent can join the membership program more than one time, select this checkbox.

Membership Program Levels and Terms

Membership programs have levels, such as Individual and Family or Bronze, Silver, and Gold. Membership programs must have at least one level. When you add a new program, you can add a maximum of 20 levels.

Note: When you enter your levels, you should begin with the lowest or most basic level first. As you add levels on the Add a membership program screen, you cannot reorder them. However, you can highlight a row and click **Insert** to insert a blank row above the one you highlighted. Once you save the program, on the Levels tab, you can select a dues-based level and click **Promote** or **Demote** to adjust the order. You cannot reorder contributions-based levels or levels in a contributions-based program.

Information about levels varies based on the type of membership program.

- For annual, single-term programs, a Levels tab appears. For each level, you enter a name and description. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions. With dues-based programs, you can also manage add-ons from this tab. For more information, see [Associate Add-ons with a Membership Program on page 40](#).
- For annual, multiple-term programs, a Terms and Levels tab appears. You specify the terms for the program, such as one year or three years. For each level, you enter a name and description. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions.
- For recurring and lifetime programs, a Payment Options/Levels tab appears. For each level, you enter a name, description, and price. For information about payment options, see [Payment Options for Membership Ps](#).

In all types of programs, you also specify the number of members, cards, and children for each level. If you use reporting groups to compare similar levels of different membership programs, you can select one for the level. You can also indicate whether members are downgraded automatically when the renewal amount is applicable to a lower membership level.

Membership types can be used to further classify membership levels. For more information, see [Membership Types on page 20](#).

Manage Membership Program Levels and Terms

Information about levels varies based on the type of membership program.

- For annual, single-term programs, a Levels tab appears. For each level, you enter a name and description. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions. With dues-based programs, you can also manage add-ons from this tab. For more information, see [Associate Add-ons with a Membership Program on page 40](#). To edit the levels of this type of a program, go to *Memberships* and click the membership program. On the membership program page, select the Levels tab and click **Edit**. When you edit levels, you can also mark which ones are active.
- For annual, multiple-term programs, a Terms and Levels tab appears. You specify the terms for the membership program, such as one year or three years. For each level, you enter a name and description. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions. To edit the levels of this type of a program, go to *Memberships* and click the membership program. On the membership program page, select the Terms and Levels tab and click **Edit**. When you edit terms and levels, you can also mark which ones are active.
- For recurring and lifetime programs, a Payment Options/Levels tab appears. For each level, you enter a name, description, and price. For information about payment options, see [Payment](#)

[Options for Membership Ps](#). To edit the levels of this type of a program, go to *Memberships* and click the membership program. On the membership program page, select the Terms and Levels tab and click **Edit**. When you edit levels, you can also mark which ones are active.

Note: When you enter membership levels, you should begin with the lowest or most basic level first. As you add levels on the Add a membership program screen, you cannot reorder them. However, you can highlight a row and click **Insert** to insert a blank row above the one you highlighted. Once you save the program, on the Levels tab, you can select a dues-based level and click **Promote** or **Demote** to adjust the order. You cannot reorder contributions-based levels or levels in a contributions-based program.

Warning: Before marking a membership level inactive, you will need to commit all Membership Dues batches containing the level you are inactivating. If you do not commit Membership Dues batches before you mark the level inactive, you will need to select a valid level in the batch before committing.

To edit pricing information, see [Manage Prices or Price Ranges on page 23](#).

Membership types can be used to further classify membership levels. For more information, see [Membership Types on page 20](#).

Membership Types

Levels in a membership program can be further classified by type. You can use types to group constituents in a level. For example, the various levels of membership in the Adopt an Animal program might have the memberships types of Bear, Zebra, and Lion.

On the Levels tab, when you add the program or edit its levels, you can select **This membership program uses types to further classify levels**. After you add or save the program, on the Levels tab, you can click **Edit types**. On the Edit membership types screen, you can select which types are available for the levels in the membership program. After types are associated with a membership program, you can select the type when you add the membership transaction.

You can manage the values in this field from **Code tables** in *Administration*.

Membership Benefits

With some membership programs, you might offer special benefits to members at a certain level, such as a key chain or calendar. You can associate benefits with benefit levels so that higher levels have higher-value benefits. You can also make benefits cumulative. If the "Standard" level has a key chain, the "Premium" level can have the key chain plus a coffee mug. The Benefits Catalog is located in *Fundraising*, but you can add benefits from a membership program if needed.

Note: To set up benefits before you add a membership program, go to *Fundraising* and click **Benefits Catalog** under **Configuration**.

The monetary value of a benefit reduces the tax deductible amount of the membership. For example, if a benefit is worth \$5, the tax deductible amount of the membership, if applicable, would be reduced by that amount.

When you set up a membership program, you can associate benefits with its levels on the Benefits tab. After the program is set up, you can manage benefits on the Benefits tab of the program. The Benefits tab displays only active membership levels.

On the Benefits tab, you can select which card format to use for membership cards for the program. You can also select which name format to use for the membership cards. In addition, you specify whether all of the amount, part of the amount, or none of the amount of membership dues is tax-deductible.

Note: Add-ons and benefits are similar. Benefits are things like items members automatically receive with their memberships or membership levels. Add-ons are optional offerings members can "add on" to their membership, for an additional cost or not depending on the item.

Manage Benefits for Membership Programs

When you set up a membership program, you can associate benefits with membership program levels on the Benefits tab. After the program is set up, you can manage benefits on the Benefits tab of the program.

The options on the Benefits tab on the Add a membership program screen are the same as the options on the Edit benefits screen on the membership program.

To manage benefits for a membership program, select the Benefits tab on the Add a membership program screen. Or from *Memberships*, click a membership program to go to the program page and select the Benefits tab. Then click **Edit**.

Screen Item	Description
Card format	Select the card format to use for membership cards for the program. The card format determines which card template to use when you print membership cards. To edit the format for a membership card, you must use the report model for the card in <i>Analysis</i> . Under Reporting services , click Report explorer . Under System Reports, Membership, Card Formats , open the card format. For information about the card formats, see Membership Card Formats on page 97 .
Name format	Select the name format option to use to determine how names appear on membership cards. Name format options are configured in <i>Marketing and Communications</i> .
Is a portion of the membership dues considered tax deductible?	Select which portion (all, some, or none) of the membership dues is considered tax-deductible.

Screen Item	Description
Benefits grid	<p>Your membership levels appear in the order you added them. We recommend you add your levels beginning with lowest or most basic level first. You can assign benefits to each level of the program.</p> <p>For the first level, click under Benefit in the grid and select a benefit.</p> <p>Under Quantity, select whether to base the quantity of the benefit on the number of members or a specific number. For example, if a level allows two members, each member may get a key chain; however, only one magazine subscription is allowed.</p> <p>If the quantity is set to a specific number, enter the number under Number to offer. If the quantity is based on the number of members, the number defaults to the number of members allowed for the level and cannot be changed.</p> <p>Under Frequency, select whether the benefit should be issued with every renewal or just the first time the member joins. For example, some benefits, such as a welcome kit, may be issued only once.</p> <p>If your benefits accumulate, you can click Include the benefits from the previous level. This automatically copies the benefits from the previous level to the current level. You can then edit them as needed. To remove a benefit, select its row and press DELETE on your keyboard.</p>

Guest Pass Benefits

If your system is configured in *Tickets* to allow guest passes, you can assign guest pass benefits to membership levels. For example, you can give your highest level members four guest passes they can use for select ticketing programs. Like other benefits, you can choose the quantity, number to offer, and frequency of eligibility. You can also choose when passes expire.

Guest passes are issued automatically when a patron purchases a new membership or renews a qualifying membership. Issued passes appear in the **Benefits and sent items** section of the member's record and on the Guest Passes tab of their constituent record.

- From the membership record, you can edit the expiration date for the passes. You can also delete the guest pass benefit if no passes have been redeemed yet. To edit the quantity of passes issued, use the Benefits tab on the sales order or payment.
- If the purchased membership level allows multiple members, such as a Family level, each person listed as a member on the membership record is entitled to the guest pass benefit. For example, if a membership level awards two guest passes, two passes appear on the primary constituent's record as well as each family members' records. There are two passes available for the family — not two per member.
- If a member upgrades their membership at mid-term or end of term, and the upgrade qualifies them for additional passes, the new passes are added to any remaining passes from their previous membership level.
- Guest passes are redeemed in *Daily Sales*. Printed passes aren't necessary— you simply need some mechanism to verify the pass owner's identity. For example, a member can present their

membership card or driver's license. . **Note:** If you need to provide printed passes, you can use query fields to export guest pass information to a merge tool outside of **Altru**.

Note: Guest passes can also be issued to constituents (non-members). For example, if an exhibit is unavailable when a patron visits, you can give them a guest pass to return on a different day. For more information, see [Manage Constituent Guest Passes](#).

Membership Program Prices or Price Ranges

Some membership programs use prices or price ranges instead of a set amount per level.

Information about prices varies based on the type of membership program.

- For annual, single-term programs, you set a price for each membership level. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions. These programs do not have a separate Prices or Price Ranges tabs.
- For annual, dues-based multiple-term programs and for recurring or lifetime giving programs, a Prices tab appears. Each level is listed in the prices grid, along with columns for each term. You enter the price for each level and term. For these programs, you can also manage add-ons from this tab. For more information, see [Associate Add-ons with a Membership Program on page 40](#).
- For annual, multiple-term programs that are contributions-based or both dues- and contributions-based, a Price Ranges tab appears. Each level is listed in the grid, along with two columns for each term—one column for the smallest gift amount and one for the largest gift amount. These are the gift amount ranges to qualify for each level and term. Contributions-based programs do not use add-ons, but if the program is both dues- and contributions-based, you can manage add-ons from this tab as well. For more information, see [Associate Add-ons with a Membership Program on page 40](#).

Note: When you have multiple terms, you must set up each term for each level. If you have term and level combinations that aren't used, once you save the program, you can go the Prices tab and click **Edit**. When you price information, you can mark the term and level combinations inactive.

Manage Prices or Price Ranges

To manage prices or price ranges for membership programs that use them, select the Prices tab or Price Ranges tab on the Add a membership program screen. Or from *Memberships*, click a membership program to go to the program page and select the Prices tab or Price Ranges tab.

- Annual, single-term programs do not have a Prices tab or a Price Ranges tab. For these types of programs, prices are set up on the Levels tab.
- For annual, dues-based multiple-term programs and for recurring or lifetime giving programs, a Prices tab appears. Each level is listed in the prices grid, along with columns for each term. You enter the price for each level and term. For these programs, you can also manage add-ons from this tab. For more information, see [Associate Add-ons with a Membership Program on page 40](#).

- For annual, multiple-term programs that are contributions-based or both dues- and contributions-based, a Price Ranges tab appears. Each level is listed in the grid, along with two columns for each term—one column for the smallest gift amount and one for the largest gift amount. These are the gift amount ranges to qualify for each level and term. Contributions-based programs do not use add-ons, but if the program is both dues- and contributions-based, you can manage add-ons from this tab as well. For more information, see [Associate Add-ons with a Membership Program on page 40](#).

Note: When you have multiple terms, you must set up each term for each level. If you have term and level combinations that aren't used, once you save the program, you can go the Prices tab and click **Edit**. When you edit the pricing information, you can mark the unneeded term and level combinations inactive.

To edit level or term information, see [Manage Membership Program Levels and Terms on page 19](#).

Rules for Dues and Contributions

Membership programs can be dues-based, contributions-based, or both. Programs that are both base some levels on dues and others on contributions. For example, a museum might have an annual membership program with Individual, Couple, and Family as dues-based levels. In addition, the program might have higher levels for Friends of the Museum and other giving societies.

You must set up rules for how to handle dues-based programs and levels, in addition to rules for contributions-based programs and levels.

Rules for Dues-Based Programs and Levels

When you set up dues-based programs or levels, you have a Dues tab on the Add a membership program screen. On the Dues tab, you can set up basic rules for the dues, in addition to discounts that could apply to the membership program. After you create the program, the rules about dues appear on the Rules tab of the membership program page.

Note: Programs that have some dues-based levels and some contributions-based levels have both the Dues tab and Contributions tab on the Add a membership program screen. After you create the program, both sets of rules appear on the Rules tab of the membership program page.

When a membership level is purchased with dues, you indicate if any portion of the dues amount is treated as a contribution. If you select **Yes, the tax deductible portion from benefits is contributed membership revenue**, the tax-deductible portion of the dues is considered to be a donation. Any payment over the dues amount is automatically treated as a donation. If there is a donation portion, you specify on the membership program which designations to use. You can specify multiple designations and assign each a percent value. Donations over the dues amount will be split across the designations as you specify.

For dues-based programs, you can also select which promotions can be used. Promotions are discounts that can be applied against a membership purchase or payment to reduce the total amount owed. For example, a membership program might have a student discount, as well as a \$5 off promotion. Available promotions can be applied when the membership is sold or entered. For more information about promotions, see [Membership Promotions on page 40](#).

- For annual, dues-based programs, you can also establish payment options.
- Recurring and lifetime programs have payment options on the Payment Options/Levels tab.

For information about payment options, see [Payment Options for Membership Ps.](#)

To manage rules for dues for membership programs that use them, select the Dues tab on the Add a membership program screen. Or from *Memberships*, click a membership program to go to the program page and select the Rules tab.

Rules for Contributions-Based Programs and Levels

When you set up contributions-based programs or levels, a Contributions tab appears on the Add a membership program screen. On the Contributions tab, you can set up basic rules for the contributions. After you create the program, the rules about contributions appear on the Rules tab of the membership program page.

Note: Programs that have some dues-based levels and some contributions-based levels have both the Dues tab and the Contributions tab on the Add a membership program screen. After you create the program, both sets of rules appear on the Rules tab of the membership program page.

To manage rules for contributions for membership programs that use them, select the Contributions tab on the Add a membership program screen. Or, from *Memberships*, click a membership program to go to the program page and select the Rules tab.

Screen Item	Description
What types of giving activity are counted toward a membership?	<p>Select what types of revenue transactions count toward a membership.</p> <p>Payments for donations, pledges, recurring, and planned gifts: Select this to include activity for any designation, specific designations, or one specific designation.</p> <p>Pledges: Select this if pledges (not pledge payments) count.</p> <p>Recurring gifts: Select this if recurring gift payments count.</p> <p>Event registration payments: Select this if paid event registrations count. You can include registration payments for any events or for events in a specified category.</p> <p>Membership dues payments: Select this if membership dues payments count. You can include dues payments in any membership program or in a specified program.</p> <p>In order to build more specific qualification rule sets for what types of revenue transactions count toward a membership, you can use a revenue application selection instead.</p>

Screen Item	Description
Can multiple revenue transactions count toward a membership?	<p>If a single transaction on its own is the only way to qualify for a contributions-based level, select No, only a single revenue transaction counts. If you have a contributions-based level in a program for giving between \$1000 and \$5000, a donor with five \$500 transactions (even within a single term of the program) does not qualify.</p> <p>If the five \$500 transactions given within the term of the program would qualify, select Yes, the combined amounts of multiple revenue transactions count.</p>
What happens if they give more?	<p>Money given during the renewal window automatically counts toward a renewal. If a gift large enough for an upgrade is given before the renewal window, you specify how to count it.</p> <p>You can count the money as additional revenue, toward an upgrade, or toward a renewal.</p> <p>Gifts not large enough for an upgrade that are given before the renewal window are treated as additional revenue.</p>
When does the membership expire?	<p>For contributions-based memberships, define the date(s) used to determine when the memberships expire.</p> <p>Select The transaction date of the gift to set the membership to expire after the gift date plus the length of the term. A one-year term membership awarded based on a gift date of the first of March would expire one year later.</p> <p>Select The last day of the month the gift was received to set the membership to expire on the last day of the month after the gift date plus the length of the term. A one-year term membership awarded based on a gift date of the first of March would expire at the end of March one year later.</p>

Membership Program Renewals

For dues-based and contributions-based programs and levels, you set rules for renewals and the renewal window. You set rules about the membership term and when dues-based levels expire.

For dues-based programs, when a membership is in the renewal window, the membership page for the constituent has a **Renew now** button. Prior to the renewal window, this button is **Upgrade now** and is used for a mid-term upgrade to the membership. For contributions-based programs, the Membership contribution process uses the renewal window to determine when existing members are eligible for a renewal.

To expire the memberships for the program on the same day and month every year, select **Is fixed** and enter the month and day in the **Expiration date** column. In the **Push to next period after** column, enter the membership join date that extends the membership until the next expiration date. For example, you enter 12/31 in the **Expiration date** column. If you enter 09/01 in the **Push to next period after** column, the expiration date for a constituent who joins on or after September 1 is December 31 of the following year, not the current year. You can enter multiple rows of dates in this grid if you want to expire and push multiple dates throughout the year.

You then define the renewal window and what happens before and after the expiration date. You also specify what happens after the renewal window closes.

You can run the Update Membership Status global change to go through your membership programs and update the members' statuses automatically based on the rules for the renewal window for the programs. For more information, see [Manage Renewal Information for Membership Programs on page 27](#).

New and existing members can sign up for auto-renewal which allows you to charge their credit card automatically when their membership is set to expire. For more information, see [Automatic Membership Renewals on page 1](#).

Manage Renewal Information for Membership Programs

To manage rules for renewals for membership programs, select the Renewals tab on the Add a membership program screen. Or, from *Memberships*, click a membership program to go to the program page and select the Renewals tab.

When you set up membership programs, you determine how and when the membership status of a member should change once the membership has expired, based on the rules for the membership renewal window. For example, a member's status might change to lapsed once the membership expires. You can run the Update Membership Status global change to go through your membership programs and update the members' statuses automatically based on the rules for the renewal window for the programs.

To update membership statuses, go to *Administration* and click **Global changes**. On the Global Changes page, click **Add** and select the Update Membership Status global change definition. You can use a selection to specify the membership programs to include.

Screen Item	Description
Membership term	Select how the membership term is calculated for dues-based memberships. The term is either fixed (such as based on a calendar year) or can vary according to the membership start date (such as based on a rolling year).

Screen Item	Description
<p>When a member joins a dues-based level, set the expiration date to</p>	<p>Select Same day as transaction date if the membership should expire on the same date as the transaction, according to however the membership term is defined. For example, if a constituent buys a membership with a one-year term on the first of December, the membership expires on the first of December the following year.</p> <p>Select End of month to give members a little extra time before their memberships expire. For the same example, if a constituent buys a membership with a one-year term on the first of December, the membership expires at the end of December the following year.</p> <p>When you select End of month, you can also indicate the membership should expire at the end of the prior month. When you select this, you set the day of the month to use. For example, you could set the membership to expire at the end of the prior month when starting before day 2 of the month. If a member joins on the first of December, rather than giving the member 13 months for a one-year term, you might set the membership to expire at the end of the following November instead, which would be exactly 12 months. If the member joined on the second (or later) of December, the membership expires at the end of December the following year.</p> <p>You can also select Is fixed and set a date when all dues-based memberships for the program expire. If selected, you must enter a date.</p> <p>To expire the memberships for the program on the same day and month every year, select Is fixed and enter the month and day in the Expiration date column. In the Push to next period after column, enter the membership join date that extends the membership until the next expiration date. For example, you enter 12/31 in the Expiration date column. If you enter 09/01 in the Push to next period after column, the expiration date for a constituent who joins on or after September 1 is December 31 of the following year, not the current year. You can enter multiple rows of dates in this grid if you want to expire and push multiple dates throughout the year.</p>
<p>Before the expiration date</p>	<p>Set rules for when the renewal begins and whether memberships can be set up to renew automatically.</p> <p>For dues-based programs, when a membership is in the renewal window, the membership page for the constituent has a Renew now button. Prior to the renewal window, this button is Upgrade now and is used for a mid-term upgrade of the membership. For contributions-based programs, the Membership contribution process uses the renewal window to determine when existing members are eligible for a renewal.</p> <p>In Renewal window starts, select how many months before the expiration date (0 to 12) or select "at start of membership." The renewal window options are the same regardless of the length of the terms.</p> <p>For members who are set to renew automatically, you can set the renewal process to take place 1-31 days or 1-12 months before the expiration date. Or you can set the renewal process to take place on a specific day of the month the membership expires. You can also specify whether members can renew automatically.</p>

Screen Item	Description
After the expiration date	<p>Define when the renewal window for the membership program ends. You can set it to end 0-12 months after the membership expires. If this is set to zero months after expiration, the renewal window ends when the membership expires.</p> <p>If the renewal windows ends 1-12 months after expiration (as opposed to zero months), revenue received during that window counts toward a renewal of the membership.</p> <p>You can then set rules for when membership statuses should change for members whose memberships have expired, but are still within the renewal window. You can set status changes for each month until the renewal window is closed. For example, if the renewal window ends three months after the membership is expired, you might keep a member "Active" during the first month, "Grace" during the second month, and "Lapsed" during the third month after expiration.</p>
After the renewal window	<p>Specify how to count revenue from a member after the renewal window closes. It can count toward a rejoin of the previous membership or toward a new membership.</p> <p>You must also specify the status for members after the renewal window closes. For example, after the renewal window closes and a member does not renew, you might consider those members "Expired."</p>

Automatic Renewals for Memberships

New and existing members can sign up for auto-renewal which allows you to charge their credit card automatically when their membership is set to expire.

To enable automatic membership renewals, you'll need to complete these configuration steps:

1. Configure membership programs to allow auto-renewal.
2. Configure membership promotions for auto-renewing memberships.
3. Configure web forms to allow auto-renewal.
4. Configure membership renewal notices for auto-renewals and review and update the default content for the associated packages.
5. Sign up to be alerted by email when credit cards are rejected.

Once enabled, this is the workflow for managing automatic renewals:

1. Enroll new and existing members in auto-renewals from *Sales* and the back office.
2. Members can enroll in auto-renewals when they purchase or renew memberships online using membership forms.
3. Renewal notices are sent to members to tell them their membership is about to expire and that their credit card will be charged automatically.
4. Payments from auto-renewals are automatically processed through a credit card batch at time of renewal.

- You can query to find which membership programs allow auto-renewal and which members are enrolled.

Configure Membership Programs for Auto-Renewal

You can configure new and existing membership programs to make them available for automatic renewals.

Note: Only dues-based annual programs can be auto-renewed.

➤ Configure new membership programs for automatic renewals

Under **General**, select **Annual** and **Dues based**. Then select **Allow auto-renewal for memberships**.

Add a membership program

General Levels Benefits Dues Renewals Review

Program name: Category: None

Description:

What kind of membership program is this?

Annual - For memberships of a specified length of time with an expiration date, such as annual membership programs and student membership programs

Allow auto-renewal for memberships
Include the 'Renew this membership automatically when it expires' option when adding new memberships for this program.

Recurring/Sustaining - For memberships with no expiration date as long as a set amount is paid on a regular, specified basis such as \$10 a month

Lifetime - For memberships with no expiration date as long as a specified amount is paid in full within a specified timeframe

How do people obtain this membership?

Dues based - People pay for membership levels with dues
- Reported as membership revenue
- Posts to GL accounts specifically for membership

Do we have it right so far?

Based on the options you selected, your membership program looks like this:

	AMOUNT
XXXX	\$

- Define one term (such as 1 year...)
- Define any number of levels
- Define single amount

➤ Configure existing membership programs for automatic renewals

From the Membership programs page, select the annual dues-based program to make available for auto-renewal. Select the General tab and then click **Edit**. On the Edit general information screen, select **Allow automatic renewal**.

Edit general information

Name:

Description:

Category:

Allow automatic renewal

Allow multiple memberships

Term length:

[Help](#)

You can verify whether a membership program is enabled for auto-renewals on the General tab.

Membership Programs
President's Club

Membership program | Activity | Revenue | **General** | Levels | Benefits | Rules | Renewals

This is an annual program that is dues based. [Edit](#)

Program name: President's Club

Description:

Approved for website: Yes

Allow automatic renewal: Yes

Term(s): 1 year(s) Allow multiple memberships: No

Category: None

Configure Membership Promotions for Auto-Renewal

To encourage members to enroll in automatic renewals, you can provide special discounts and term extensions as an incentive, such as a free 3 month extension or 10% off the membership price.

➤ Configure auto-renewal promotions

To restrict a promotion to only membership programs enabled for auto-renewals, from the Add/Edit membership promotion screen, select **Restrict this promotion to automatically renewing membership programs (Applies to first payment only, not future renewal payments)**. These types

of promotions apply to the current membership payment and will not discount or add a term extension when the membership is automatically renewed.

➤ Add auto-renewal promotions to membership programs

From a membership program configured to allow automatic renewals, on the Rules tab, click **Edit**. Under **Do any of these promotions apply to levels in this program?** select which promotions you want to offer.

Set Up Renewal Notices for Auto-renewals

You'll need to set up renewal notice processes for each membership program you enable for auto-renewals. The default packages are set to pull members whose renewal window begins next month.

These default packages are provided for auto-renewals:

- 1 month before auto-renewal (mail)
- 1 month before auto-renewal (email)

➤ Review and update content for auto-renewal packages

1. From the membership program record, select **View packages** under **Renewal Notices**.
2. On the Packages page, select **1 month before auto-renewal (mail)** or **1 month before auto-renewal (email)** and click **Edit**.
3. On the Edit package screen, you can edit the details of the package.

Edit mail package

Package details

Name:

Description:

Category:

Costs

Base cost: Distribution:

Primary content

Letter:  

Export definition:  

 Help

- To update the content of the package's letter or message, click the pencil next to **Letter** or **Message**. On the Edit membership renewal letter or Edit email screen, you can open the *Word* template or message template and make any changes.

➤ Set up membership renewal notices

- From a membership program record, select **Set up membership renewal notices** under **Renewal Notices**.
- Select **1 month before auto-renewal** for the **Time to expiration**.
- In the **Mail package** and **Email package** columns choose which packages to send for the notice. You can use the default packages provided for auto-renewals or select custom packages you created.

Renewal notices

Select the points in time you want to contact your members about membership renewal, then select a mail package, email package, or both for each renewal notice. Each patron's communication preference will be observed if both are selected.

	Time to expiration	Mail package	Email package
<input type="checkbox"/>	2 months before		
<input type="checkbox"/>	1 month before	1-month renewal notice (...)	1-month renewal notice (...)
<input checked="" type="checkbox"/>	1 month before auto-renewal	1 month before auto-renewal...	1-month before auto-renewal...
<input type="checkbox"/>	Month of expiration	Month of expiration notice...	Month of expiration notice...
<input type="checkbox"/>	1 month after	Membership expired notice...	Membership expired notice...
<input type="checkbox"/>	2 months after		
<input type="checkbox"/>	3 months after		

Enable Auto-Renewal for Membership Forms

Website users can enroll in automatic renewals when they purchase or renew memberships online using membership forms.

After a membership program has been configured to allow automatic renewals, you can enable the auto-renewal option for online sales. From the Manage Membership Forms page in *Web*, select the membership program and then click **Options**. Under **Automatically renew**, select **Automatically renew membership**.

Design Language

Fields to include
Select the fields to include on the membership form. Then select whether to require users to complete these fields before they submit the form.

Automatically renew

Include	Field	Require
<input checked="" type="checkbox"/>	Automatically renew membership	<input type="checkbox"/>

On the Language tab, you can update the text for the auto-renewal option, if needed.

Design Language

Specify any part text to be replaced with alternate text for a specific language.

Category: Automatically renew Language: English (United States)

Item name	Item type	Default text	Text
Automatically renew	Field label	Renew this membership automatically when it expires.	Renew this membership automati
Automatically renew details	Field label	By enrolling in auto-renewal you are authorizing us to automatically charge your card for your next memberships without any additional action by you.	By enrolling in auto-renewal you a

Once enabled for auto-renewals, the **Renew this membership automatically when it expires** option appears on the membership web form.

Berry Membership

Select your membership options.

1 year
\$100.00

Renew this membership automatically when it expires.

By enrolling in auto-renewal you are authorizing us to automatically charge your card for your next memberships without any additional action by you.

When a user selects this option and goes to check out, the shopping cart displays "Auto-renewal: Yes" for the membership.

Barry Membership
Level: Level1
Term: 1 year
Number of children: 0
For: Gaurav Kaushal
Auto-renewal: Yes
1 at \$10.00

Tip: If a website user purchases the membership as a gift and chooses to automatically renew, all renewal notices are sent to the giver.

Enroll Members in Auto-Renewals from Sales

A patron can enroll in auto-renewals when they purchase a membership.

From an order in Daily or Advance Sales, select a membership with auto-renewals enabled. On the Sell a membership screen, select **Renew this membership automatically when it expires. (Credit card required)**.

The screenshot shows a web form titled "Sell a membership" for a "President's Club - Platinum (1 year(s))" membership. The price is listed as \$100.00. The form includes several input fields: "Level" (set to Platinum), "Term" (set to 1 year(s)), and "Expiration" (set to 6/4/2019). There are also fields for "Total members allowed" (4), "No. of children" (0), and "Comments". A checkbox labeled "Renew this membership automatically when it expires. (Credit card required)" is checked and highlighted with an orange circle. At the bottom, there are buttons for "Members" and "Membership".

Notes:

- Memberships set to auto-renew must be paid with a credit card. That number is held on file and charged automatically the day before the current membership's expiration date.
- If a patron purchases a membership as a gift and chooses to auto-renew, the **Send renewal notice to** option is set to send notices to the giver by default. However, you can choose to send renewal notices to the primary member (or both) instead.
- If a lapsed member wants to enroll in auto-renewals when they rejoin, click **Rejoin**. Select the membership in the cart and click **Edit**. On the Edit membership screen, select **Renew this membership automatically when it expires. (Credit card required)**.

Enroll Members in Auto-Renewals from the Back Office

When you add membership transactions in the back office — from the Add a membership screen or a membership dues batch — you can enroll new and existing members in auto-renewals

➤ Enroll a new member in auto-renewals

From the Add a membership or Enter membership dues screen, under **What are they paying for?**, select **Renew this membership automatically when it expires. (Credit card required)**.

Under **How are they paying?** enter the credit card number to pay for this membership and for the renewal.

Add a membership

Ashley Atkins

What are they paying for?

Ashley Atkins's memberships: Rejoin the President's Club - Platinum

Program: President's Club Benefits: Edit

Level: Platinum

Term: 1 year(s)

Expires on: 6/4/2019

Pay in full
 Pay first installment
 Create installment plan

Membership amount: \$100.00

Renew this membership automatically when it expires. (Credit card required)

Is there a discount or promotion?

Tax deductible amount: \$100.00 Total amount: \$100.00

Help Save Cancel

➤ Enroll an existing member in auto-renewals

From a member's record, under **Recent membership transactions**, select their most recent membership transaction. and click **Edit**.

On the Edit a membership transaction screen, select **Renew automatically by credit card** and enter the credit card number.

Edit a membership transaction

Level: Platinum

Term: 1 year(s)

Transaction date: 2/10/2017

Expiration date: 2/10/2018

Comments:

Renew automatically by credit card

Name on card:

Card type:

Card number:

Expires on: mm/dd/yyyy

Help Save Cancel

You can verify whether a member is enrolled in automatic renewals on their membership record.

Ashley Atkins
President's Club - 8-1000007

<p>Individual</p> <p>1 year(s)</p> <p>\$10.00</p> <p>Auto-renewal</p> <p>Active</p>	Members	Lookup ID	12 months until expiration
	Ashley Atkins	8-1000003	Expiration: 6/30/2019
			Member since: 6/4/2018
			Auto-renewal

Upgrade now

Edit members

Process Payments for Auto-Renewals

A new credit card process runs automatically at night (sometime between 3 and 5 a.m.) to process each online and offline membership auto-renewal payment. From **Revenue**, click **EFT**, and then **Credit card processing**. On the Credit Card Processing page, the new process is called "Nightly Credit Card Process for Automatic Membership Renewals."

With this new payment process, everything needed to run the credit card process for auto-renewal payments is configured for you. The process runs automatically so you don't need to worry about starting the process or creating a job schedule for it to run at a certain time.

The Payment batch template is set to "Membership Dues Batch for Scheduled Credit Card Processing". This is a new batch template created specifically for the nightly process. We recommend that you do not edit the selected fields on this batch template or you may have issues processing payments.

The Rejection handling tab on the nightly process is set to generate an exception batch for all payments with permanent or provisional rejections. When there are rejections, the program sends an email alert to assigned users to let them know that payments failed to process. For more information about email alerts, see [Configure Credit Card Rejection Alerts](#).

Query on Auto-Renewals

Queries include these fields for auto-renewal:

- Member queries include **Is auto-renewing**
- Membership program queries include **Allows automatic renewal**
- Membership promotion queries include **For auto-renewing**

Membership Add-ons

Membership programs can have add-ons, which are additional offerings to be sold or included with memberships. Add-ons can include items such as parking passes or guest memberships. When constituents join a membership program that has add-ons, they can include or purchase the additional offerings or services.

Note: Add-ons and benefits are similar. Benefits are things like items members automatically receive with their memberships or membership levels. Add-ons are optional offerings members can "add on" to their membership, for an additional cost or not depending on the item.

To manage add-ons from *Memberships*, click **Add-ons** under **Configuration**. The Add-ons page appears. From this page, you can add, edit, and delete add-ons. After you create add-ons, you can associate them with membership programs.

➤ Add a membership program add-on

1. From *Memberships*, click **Add-ons** under **Configuration**. The Add-ons page appears.
2. On the Add-ons page, click **Add**. The Add an add-on screen appears.
3. Enter the name of the add-on, such as "Parking pass" or "Additional member."
4. In **Add-on type**, select whether the add-on is a benefit or an additional member. If you use the type "Additional member," when you add a membership for a constituent and select that add-on, you can select an additional constituent to add to the membership.

Note: An add-on used as an additional member does not change the number of cards allowed for the membership.

5. Click **Save**. You return to the Add-ons page. The new add-on is available to associate with a membership program.

➤ Edit an add-on

After you create an add-on, you can edit its name. If the add-on has not yet been associated with a membership program, the add-on type is also editable. After the add-on is associated with a program, the add-on type is not editable. From *Memberships*, click **Add-ons** under **Configuration**. The Add-ons page appears. Select the add-on and click **Edit**.

➤ Delete an add-on

After you create an add-on, you can delete it only if it has not been associated with a membership program. If the add-on is associated with a membership program, you cannot delete the add-on. From *Memberships*, click **Add-ons** under **Configuration**. The Add-ons page appears. Select the add-on and click **Delete**. If the add-on is not associated with a membership program, it is deleted.

Associate Add-ons with a Membership Program

When you add or edit a membership program, you can associate add-ons with the program. When constituents join a membership program that has add-ons, they can include or purchase the additional offering or service. Add-ons do not apply to contributions-based programs.

Access to add-ons varies based on the type of membership program.

- For annual, dues-based programs with one term, add-ons appear on the Levels tab.
- For multi-term, annual programs and for recurring and lifetime programs, add-ons appear on the Prices or Price Ranges tab.

Under **Add-ons**, click **Add**. You can select the add-on and assign a price. Select **Can purchase multiple** if a constituent can have more than one of the add-on. For example, you may allow members to purchase one additional guest member pass, but not more than one. You can also edit and delete add-ons from a membership program.

Note: An add-on used as an additional member does not change the number of cards allowed for the membership.

Tip: If you plan to discount tickets for the membership program or level, make sure to set the ticket limit on the discount high enough to include both members and potential add-on members. If the combined number of members and add-on members exceeds the ticket limit, not all members will receive their ticket discounts. For more information about discounts, see the *Tickets Guide*.

Membership Promotions

To encourage people to join membership programs, or to encourage current members to renew or upgrade their memberships, you can configure membership promotions. Membership promotions are discounts on the cost of memberships or term extensions on memberships. For example, you can create a membership promotion that provides a 20% price reduction in the cost of membership renewal when members renew before the end of the year.

Note: The value of a membership promotion cannot exceed \$999.

From the Membership Promotions page you can add, edit and delete promotions. You can also mark membership promotions as inactive if necessary. You can access the Membership Promotions page from the *Tickets* or *Memberships* areas.

Configure Membership Promotions

To encourage constituents to join membership programs, or to encourage current members to renew or upgrade their memberships, you can configure membership promotions. You can configure membership promotions that provide a discount on the cost of memberships or term extensions for current members.

Membership promotions that provide discounts can be calculated as a specific amount or percentage off of the purchase. For promotions that provide a term extension, you can specify the number of months by which to extend the term of a membership.

You can apply membership promotions to Daily sales and Advance sales. You can also apply membership promotions to Online sales if you use the **With code** application type.

From the Membership Promotions page you can add, edit, and delete promotions. You can also mark membership promotions as inactive if necessary. You can access the Membership Promotions page from the *Tickets* or *Memberships* areas.

➤ Add membership promotions

1. From the Membership Promotions page, click **Add**. The Add a membership promotion screen appears.
2. Enter a name and description for the membership promotion such as to explain what the promotion offers.
The name you enter here will display at the point of sale when processing orders, on receipts and other order documentation, and on reports.
3. In the **Application type** field, select whether the discount should be applied manually or with the entry of a promotional code.
 - If you select **With code**, a grid appears to enter the promotion code and the dates the code is valid. If you do not select any dates, the code is always valid.
4. In the **Promotion type** field, select whether the promotion will provide a discount on the price of the membership or a term extension for the membership.
5. If you select **Discount**, select whether the discount should be calculated as a dollar amount off of the price of the membership, or a percentage. Then enter the dollar amount or percentage.
If you select **Term extension**, enter the number of months by which to extend the membership term.
6. To restrict a promotion to only membership programs enabled for auto-renewals, select **Restrict this promotion to automatically renewing membership programs (Applies to first payment only, not future renewal payments)**. These types of promotions apply to the current membership payment and will not discount or add a term extension when the membership is automatically renewed.
7. Click **Save**. You return to the Membership Promotions page.

➤ Edit membership promotions

1. From the Membership Promotions page, select a promotion to edit and click **Edit**. The Edit membership promotion screen appears.
2. If needed, edit the name and description for the membership promotion to explain what the promotion offers.
The name you enter here will display at the point of sale when processing orders, on receipts and other order documentation, and on reports.
3. In the **Application type** field, select whether the discount should be applied manually, or with the entry of a promotional code.
If you select **With code**, a grid appears to enter the promotion code and the dates the code is valid. If you do not select any dates, the code is always valid.
4. In the **Promotion type** field, select whether the promotion will provide a discount on the price of the membership or a term extension for the membership.
5. If you select **Discount**, select whether the discount should be calculated as a dollar amount off of the price of the membership, or as a percentage. Then enter the dollar amount or percentage.
If you select **Term extension**, enter the number of months by which to extend the membership term.
6. To restrict a promotion to only membership programs enabled for auto-renewals, select **Restrict this promotion to automatically renewing membership programs (Applies to first payment only, not future renewal payments)**. These types of promotions apply to the current membership payment and will not discount or add a term extension when the membership is automatically renewed.
7. Click **Save**. You return to the Membership Promotions page.

➤ Delete membership promotions

If necessary, you can delete a membership promotion. On the Membership Promotions page, select the membership promotion to delete and click **Delete**. You cannot delete membership promotions currently in use. Instead, mark the membership promotion as inactive.

Edit Membership Promotion Codes

If you configured a membership promotion to be applied with a promotion code, you can add or edit promotion codes at any time. This is helpful as it allows you to continually extend a discount by adding more codes or editing the existing codes.

➤ Edit membership promotion codes

1. From the Membership Promotions page, select a promotion configured to be applied with promotion codes and click **Edit**. The Edit membership promotion screen appears.
2. In the **Code** column of the grid, you can enter a new promotional code or edit an existing code. These are the actual codes that will need to be entered to apply the discounts.

3. In the **Valid from** and **Valid to** fields, enter dates in which the promotion code is valid for use.

Note: If you do not enter any dates, the promotion code is always valid.

4. Click **Save**. You return to the membership promotion record.

Mark Membership Promotions as Inactive

If a membership promotion is no longer in use, you can mark it as inactive from the Membership Promotions page. From the Membership Promotions page, in the grid, select an active membership promotion and click **Mark inactive**. If you need to use the membership promotion again, you can mark it as active.

You can access the Membership Promotions page from the *Tickets* or *Memberships* areas.

Manage Membership Promotions

After you create a membership promotion, from the membership promotion record you can manage availability criteria and GL mapping, as well as patron address restrictions, programs, memberships, and constituencies that are associated with the discount. Each individual discount record displays configuration details at the top of the screen. These details include the name and description, discount application, use, calculation type, and value.

To view a promotion record, from the Membership Promotions page, click the name of the membership promotion in the grid. The promotion record appears.

Membership Contribution Processes

Contributions-based membership programs need to determine if a donor's cumulative contributions qualify that donor for a membership or for an upgrade. You can add a Membership contribution process to run to make those determinations for all contributions-based programs and levels or for one specific program.

To access membership contribution processes, from *Memberships*, click **Membership contribution process** under **Tasks**. The Membership Contribution Processes page appears. From this page, you can add, edit, and delete processes. You can click on the name of a process to access the process page. You can also select a process and click **Start process**.

Note: This process is set up to run automatically every night.

Manage Membership Contribution Processes

When you add a membership contribution process, you give it a name and description. You can then specify whether the process should check revenue for all membership programs or for one specific program. This process checks only programs that are contributions-based or have contributions-based levels.

➤ Add a membership contribution process

1. From *Memberships*, click **Membership contribution process** under **Tasks**. The Membership Contribution Processes page appears.
2. Click **Add** or, to edit an existing process, select the process and click **Edit**. The Add (or Edit) a membership contribution process screen appears.
3. Enter a name and description for the process.
4. Under **This process will find revenue for**, select **All programs** to search for revenue associated with only programs that are contributions-based or have contributions-based levels. You can also select a single, specific membership program to use.
5. Click **Save**. You return to the Membership Contribution Processes page.

➤ Edit a membership contribution process

Once you create a contribution process, you can edit it from the Membership Contribution Processes page or from the process itself. On the Membership Contribution Processes page, select an existing process and click **Edit**. If you click on the name of a contribution on the Membership Contribution Processes page, you go to the process page and can click **Edit process** under **Tasks**.

➤ Delete a membership contribution process

When you no longer need a contribution process, you can delete it from the Membership Contribution Processes page or from the process itself. On the Membership Contribution Processes page, select an existing process and click **Delete**. If you click on the name of a contribution on the Membership Contribution Processes page, you go to the process page and can click **Delete process** under **Tasks**.

Warning: If you delete a contribution process, it will no longer determine if a donor's cumulative contributions qualify that donor for a membership or for an upgrade.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number

of records processed; and how many of those records processed successfully and how many were exceptions.

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of "Did not finish." To filter the records that appear in the grid, click **Filters**. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh**.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history. To delete a status record, select it and click **Delete**.

➤ Delete a status record from the History tab

1. On the History tab of the process status page, click the double arrows beside a status record and click **Delete**. A confirmation message appears.

Note: You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create Job Screen

Screen Item Description

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date .

> Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.

Create job

Details

Job name:

Schedule type:

Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

Occurs once at:

Occurs every: Starting at:

Ending at:

Duration

Starting at: End date:

No end date

Help Save Cancel

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
 - a. For a process that runs once, select the date and time to run it.
 - b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single

time or at regular intervals on the days when it runs.

- c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package to create the job schedule. To edit a job, select it and click **Edit**.

> Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to [Create Job Screen on page 46](#).
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as changes made to it outside the program. To delete a job schedule, select it and click **Delete**.

> Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Start Process

This task allows you to start the selected business process from the process page.

Membership Renewal Notices

For constituents with memberships near expiration, or past expiration, set up membership renewal notices to contact members and encourage them to renew on a regular basis. You can configure and specify membership renewal notices to be sent out at preferred time intervals to constituents, such as one month before expiration, again in the month of expiration, and one month after expiration. You can create a membership renewal notice for each membership program your organization offers.

Included in the membership renewal notice are packages that contain different letters or documents that encourage renewal. You can send mail packages or email packages. By default, three packages have been created and contain three export definitions for use in the packages you send to your constituents. For information about how to edit packages or export definitions, see the *Marketing and Communications Guide*.

You'll need to set up renewal notice processes for each membership program you enable for auto-renewals. The default packages — 1 month before auto-renewal (mail) and 1 month before auto-renewal (email) — are set to pull members whose renewal window begins next month. For more information about auto-renewal notices, see [Set Up Renewal Notices for Auto-renewals on page 32](#).

You set up membership renewal notices from the membership program record.

➤ Set up membership renewal notices

1. From a membership program record, click **Set up membership renewal notices** under **Renewal Notices**. The Set up membership renewal notices screen appears.

Set up membership renewal notices for Aquarium membership

Name:

Description:

Membership levels to include

Level
<input checked="" type="checkbox"/> Dual
<input checked="" type="checkbox"/> Single
<input checked="" type="checkbox"/> Family

Renewal notices

Select the points in time you want to contact your members about membership renewal, then select a mail package, email package, or both for each renewal notice. Each patron's communication preference will be observed if both are selected.

	Time to expiration	Mail package	Email package
<input type="checkbox"/>	3 months before		
<input type="checkbox"/>	2 months before		
<input checked="" type="checkbox"/>	1 month before	1-month renewal notice (...)	1-month renewal notice (...)
<input checked="" type="checkbox"/>	Month of expiration	Month of expiration notic...	Month of expiration notic...
<input checked="" type="checkbox"/>	1 month after	Membership expired noti...	Membership expired noti...
<input type="checkbox"/>	2 months after		
<input type="checkbox"/>	3 months after		

For patrons with no mail or email package preference, use when both are selected.

Help Save Cancel

2. Enter a description for the renewal notices.
3. Under **Renewal notices**, select when to send membership renewal notices to constituents. By default, **1 month before**, **Month of expiration**, and **1 month after** are automatically selected, along with their corresponding mail and email packages. To remove these defaults, clear the checkboxes.
4. To select a different mail or email package, select the row to edit and click the magnifying glass in the **Mail package** or **Email package** column. The Package Search screen appears. Search for a package to use in your membership renewal notice. For information about how to search for packages, see the *Marketing and Communications Guide*.
5. After you select mail and email packages for a time interval, select whether to use **Mail** or **Email** packages when the recipient does not have a specified preference.
6. Select the membership levels to include when renewal notices are processed.

7. Click **Save**. You return to the membership program record.

View Packages

Before you process membership renewals notices, you may want to view the mail or email packages you have selected for use in your notices. To view packages, on the membership program record, click **View packages** under **Renewal Notices**. The Packages page appears. From the Packages page, you can add, edit, or delete packages if necessary. For more information about the items on this page, see the *Communications Guide*.

View Letters

Before you process membership renewal notices, you may want to view the letters associated with your mail packages. To view letters, on the membership program record, click **View letters** under **Renewal Notices**. The Letters and Documents page appears. From the Letters and Documents page, you can add, edit, or delete letters if necessary. For more information about the items on this page, see the *Communications Guide*.

Process Membership Renewal Notices

After you have set up membership renewal notices, run the membership renewal notices process to generate the renewal notices. When you run the membership renewal notices process, the program prepares renewal notices for constituents whose memberships will expire in the time intervals specified when you set up the membership renewal notices. For information about how to set up membership renewal notices, see [Membership Renewal Notices on page 48](#).

When you start a membership renewal notice process, the program creates a status page of the process. On the Membership Renewal Notices status page, you can view the most recent run of the process, as well as access the Renewal Notices Status tab to see a history of all the instances the process was run.

After you generate membership renewal notices, you can merge the notices to *Microsoft Word* to print and then mail to constituents. You can also download the renewal notices as a .csv file to send to a third party to be printed and mailed, or emailed. You can also email the renewal notices directly to constituents.

Start a Membership Renewal Notice Process

When you run the membership renewal notices process, the program prepares membership renewal notices for constituents whose memberships will expire in the time intervals specified when you set up the membership renewal notices. For information about how to set up membership renewal notices, see [Membership Renewal Notices on page 48](#).

After the process completes, you can merge the renewal notices to *Microsoft Word* or download them as a .csv file to be sent to a third party and printed and sent to constituents, or emailed.

➤ Process membership renewal notices

1. From a membership program record, click **Process membership renewal notices** under **Renewal Notices**. The Process membership renewal notices screen appears.
2. By default, membership renewal notices are associated with the current membership program. To select a different appeal, click the magnifying glass.
 - To create an appeal to associate with membership renewal notices, select **Add a new appeal** and enter an appeal name and description.
 - Click **Start**. The membership renewal process begins, and the Membership Renewal Notices Status page appears. For information about the Membership Renewal Notices Status page, see [Membership Renewal Notices Process Status on page 51](#).

Note: This process may take some time to complete. You can access other areas of the program while the process runs.

Membership Renewal Notices Process Status

When you start a membership renewal notice process, the program creates a status page of the process. While you run the membership renewal notices process, you can monitor it on the Membership Renewal Notices Status page. This page automatically appears after you start the membership renewal notices process. For information about how to start the membership renewal notices process, see [Process Membership Renewal Notices on page 50](#).

On the Membership Renewal Notices Status page, you can view the most recent run of the process, as well as access the History tab to see a history of each instance when the process was run.

While the membership renewal notices process runs, you can access other areas of the program. After the process completes, you can return to the status page if necessary. To return to the Membership Renewal Notices Status page, access the membership program record that the process was run for, and click **Membership renewal notices status** under **Renewal Notices**.

Note: On the membership program record, you can also select the Renewal Notices Status tab to view a history of each instance when the process was run.

Merge, Download, or Email Membership Renewal Notices

After the membership renewal notices process completes successfully, access the Membership Renewal Notices Status page to merge, download, or email membership renewal notices.

Note: You can also access the Membership Renewal Notices Status tab on the membership record to merge, download, or email membership renewal notices.

Each time you run a membership renewal notices process, the program prepares a renewal notice for constituents who meet the membership expiration criteria selected when renewal notices were set up. For information about how to set up membership renewal notices, see [Membership Renewal Notices on page 48](#).

You can merge renewal notices to *Microsoft Word* to be printed and mailed, download a .csv file of the renewal notices to be sent to a third party to be printed and sent to constituents, or email the renewal notices to constituents with email addresses.

On the Membership Renewal Notices Status page, you can merge, download, or email renewal notices for the most recent instance of the process or for a previous instance.

Note: Before you can successfully run an email job to send membership renewal notices through email, from *Marketing and Communications* you must edit the email message to include a From address and From name.

➤ Merge membership renewal notices

1. From the membership record, click **Membership renewal notices status** under **Renewal Notices**. The Membership Renewal Notices Status page appears.

You can also select the Renewal Notices Status tab and select an instance of the process to use to merge membership renewal notices. You can merge membership renewal notices for the most recent instance or previous instances.

Note: On the Renewal Notices Status tab, you can filter the status records that appear in the grid by the process status. If you filter the records in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that completed its operation, you can select to view only status records with a **Status** of Completed. To filter the records that appear in the grid, click the filter button. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid.

2. Click **Merge**. If there are multiple letters, the Merge multiple letters screen appears. Otherwise, a download screen appears so you can make any necessary changes before you send them to constituents.
3. By default, all of the letters are selected. If you do not want to merge one of the letters, clear its checkbox.
4. Click **Merge**. A download screen appears so you can make any necessary changes before you send them to constituents.

➤ Download membership renewal notices

1. From the membership record, click **Membership renewal notices status** under **Renewal Notices**. The Membership Renewal Notices Status page appears.

You can also select the Renewal Notices Status tab and select an instance of the process to use to download a .csv file of the membership renewal notices. You can download membership renewal notices for the most recent instance or previous instances.

Note: On the Renewal Notices Status tab, you can filter the status records that appear in the grid by the process status. If you filter the records in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that completed its operation, you can select to view only status records with a **Status** of Completed. To filter the records that appear in the grid, click the filter button. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid.

2. Click **Download output**. Select Mail or Email to specify the packages to download renewal notices for. The Save As screen appears.
3. Browse to the location on the workstation or network to save the membership renewal notices .csv file.
4. In the **File name** field, enter the name of the membership renewal notices .csv file to create.
5. Click **Save**. The program generates the membership renewal notices in a .csv file. A confirmation message displays the location of the .csv file and asks whether to display the file. You can send the file to a third party to print and send membership renewal notices to constituents.

➤ Email membership renewal notices

1. From the membership record, click **Membership renewal notices status** under **Renewal Notices**. The Membership Renewal Notices Status page appears.

You can also select the Renewal Notices Status tab and select an instance of the process to use to email membership renewal notices. You can email membership renewal notices for the most recent instance or previous instances.

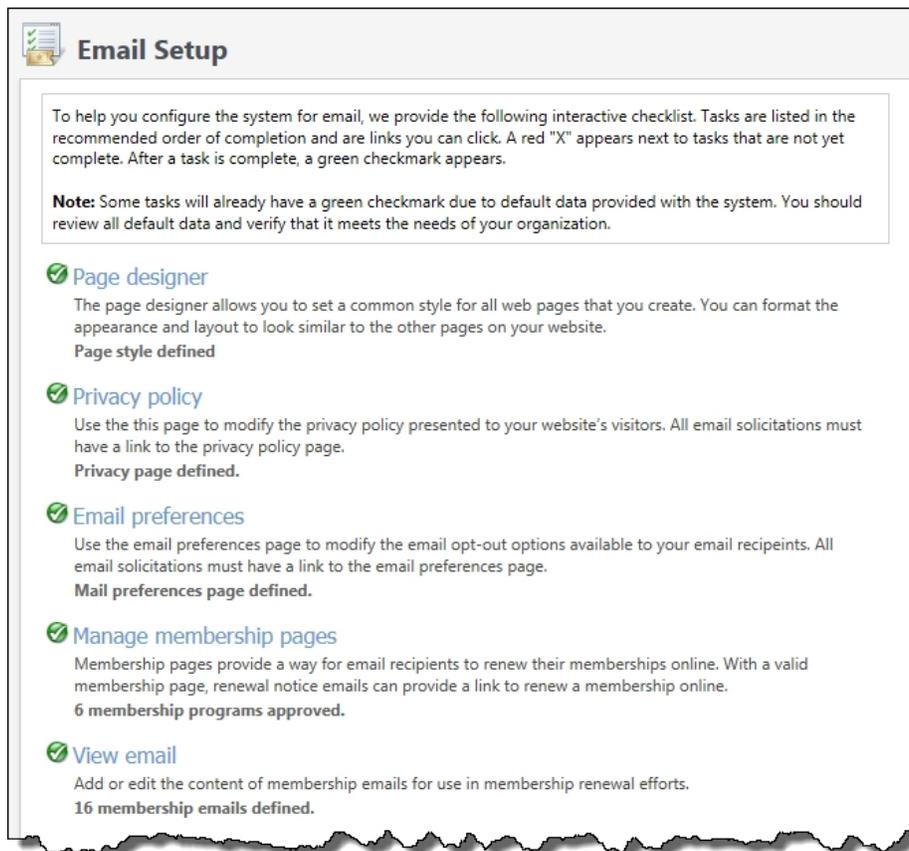
Note: On the Renewal Notices Status tab, you can filter the status records that appear in the grid by the process status. If you filter the records in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that completed its operation, you can select to view only status records with a **Status** of Completed. To filter the records that appear in the grid, click the filter button. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid.

2. Click **Start email job**. The Start email job screen appears.
3. The current date and time of day automatically appear in the **Start date** and **Time** fields. To set a specific time for your email job to start, select a different start date and time.
4. In the grid, the email packages that will be sent to constituents appear. To exclude an email package, clear the corresponding checkbox.
5. Click **Start**. You return to the Membership Renewal Notices Status page.

Note: To track your email job's status, from the Membership Renewal Notices Status page, select the renewal notice instance to view and click **View email job status detail**. The Email job status screen appears. On this screen you can view the packages that have been sent, as well as their current status and the date and time the email was sent. To refresh the email job status, from the Membership Renewal Notices Status page, select the renewal notice instance to refresh and click **Refresh email job status**.

Email Setup

To help you accurately configure the system to send membership renewal notices through email, use the Email Setup to guide you through the necessary steps. The Email Setup provides an interactive list of the tasks necessary to successfully complete initial configuration. To access the Email Setup, from *Fundraising*, click **Membership program**. The membership program record appears. Under **Renewal Notices**, click **Email setup**.



Email Setup

To help you configure the system for email, we provide the following interactive checklist. Tasks are listed in the recommended order of completion and are links you can click. A red "X" appears next to tasks that are not yet complete. After a task is complete, a green checkmark appears.

Note: Some tasks will already have a green checkmark due to default data provided with the system. You should review all default data and verify that it meets the needs of your organization.

-  **Page designer**
 The page designer allows you to set a common style for all web pages that you create. You can format the appearance and layout to look similar to the other pages on your website.
Page style defined
-  **Privacy policy**
 Use the this page to modify the privacy policy presented to your website's visitors. All email solicitations must have a link to the privacy policy page.
Privacy page defined.
-  **Email preferences**
 Use the email preferences page to modify the email opt-out options available to your email recipients. All email solicitations must have a link to the email preferences page.
Mail preferences page defined.
-  **Manage membership pages**
 Membership pages provide a way for email recipients to renew their memberships online. With a valid membership page, renewal notice emails can provide a link to renew a membership online.
6 membership programs approved.
-  **View email**
 Add or edit the content of membership emails for use in membership renewal efforts.
16 membership emails defined.

The tasks on the Email Setup are presented in a specific order because some build on others. Each task is linked to the corresponding area of the program where you complete the selected task. For example, when you select **Page designer** from the Email Setup, the Page designer screen appears so you can determine the layout and style of the web pages your organization uses.

Next to each task on the Email Setup a red "X" appears to indicate that configuration is incomplete. After each task is fully complete, a green checkmark appears. When you first access the Email Setup, some tasks will already have a green checkmark due to default data provided in the system. You should review all default data to determine how it should be edited or what needs to be added.

Provided under each task is a brief description, as well as a count of how many active individual records have been configured in each feature area. For example, if you have approved three membership pages for your web site, "3 membership pages approved" appears under **Manage membership pages** on the Email Setup.

After you complete a task, you can navigate back to the Email Setup by clicking the direct link provided in each feature area. This allows you to easily continue to the next task. To return to Email Setup from a feature area, click **Email setup** under **Setup**.

Email Setup Checklist

The following checklist is a suggested workflow for initial configuration. The tasks are presented in a specific order because some tasks may build on others. The tasks your organization needs to complete is

directly related to your business processes.

- Design your web pages. Use the page designer to configure the appearance of the pages, and you create a shopping cart to process transactions. Your design settings determine the appearance and format for all the web pages you create in *Web*, and the program routes all transactions from these pages to the shopping cart. For more information about the page designer, see the *Web Forms Guide*.
- Edit privacy policy. A default privacy policy is automatically created when you create web pages. As a requirement for complete configuration, you must review this default policy to ensure that it is right for your organization. If the generic policy does not match your organization's privacy policy, you can edit it as necessary. For more information about the privacy policy, see the *Web Forms Guide*.
- Edit email preferences. The email preferences page contains an opt-out option to allow email recipients to refuse email from your organization. When an email recipient selects to opt-out, the program updates the constituent record to select the **Do not send email to this address** checkbox for the email address. For more information about email preferences, see the *Web Forms Guide*.
- Manage membership forms. Membership forms provide a way for email recipients to renew their memberships online. You can create membership forms and approve them to appear on your web site. For more information about membership forms, see the *Web Forms Guide*.
- View email. Add or edit the content of membership email messages for use in membership renewal notices. For information about how to add or edit membership email messages, see the *Marketing and Communications Guide*.

Note: Before you can successfully run an email job to send membership renewal notices through email, from *Marketing and Communications* you must edit the email message to include a From address and From name.

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When you add a membership for a constituent, you can store and view membership information, including how long the constituent has maintained a membership, who the primary member is, and the last renewal date. On the constituent record, you can access membership information on the Memberships tab.

Constituent Memberships

If a constituent is a member of a membership program, you can view those programs on the Memberships tab of the constituent record. From the Memberships tab, click on the name of a membership program and you see the membership program page. From the Memberships tab, you can also click Add to add a membership for the constituent. For more information about how to add a membership to a constituent, see [Membership Dues on page 67](#).

Memberships Page

On the Memberships tab of the constituent record, you manage memberships for the constituent. This tab displays all memberships for the constituent, along with basic membership information for each one, such as membership program name, level, status, and the names of the members. The tab also includes the membership expiration date and quick links to renew the membership, to add an interaction, and to issue a membership card.

You can click on the name of the program for each membership on the tab to access the membership page with more detailed information about the membership.

Mark D. Adamson
Adopt an animal

Standard

\$100.00

Active

Members
Mark D. Adamson

Lookup ID
3

Expiration: 4/4/2012
Member since: 4/4/2011

[Renew now](#)

[+ Add interaction](#)

[+ Issue member card](#)

Primary member

Mark D. Adamson
 125 Smokerise Way
 Charleston, SC 29401 (Home)
 (401) 848-2254 (Summer Home)
 madamson@sncn.net

[Contact information](#) | [Communication preferences](#)

Constituencies:
[Major donor](#) [Trustee](#) [Member](#)
[more...](#)

Lifetime information

Total membership amount:
\$100.00 - 1 transaction

Last renewal:
Never

Other memberships

No other memberships

Recent member activities

[View all activities](#)

Activity	Date	Description
Event	6/2/2007	Alta Tennis Tourna...
Event	4/7/2007	Spring Ball registra...
Event	12/16/2006	Volunteer Dinner r...
Event	7/29/2006	Walk-A-Thon regis...

Benefits and sent items

[View all benefits and items](#)

Item	Date	Name

Recent membership transactions

[View complete revenue history](#) [Edit](#)

Transaction...	Action	Amount	Level	Term	Expiration d...	Type	Paid by	Appeal
4/4/2011	Join	\$100.00	Standard	1 year	4/4/2012		Mark D. Ada...	
12/3/2011	Upgrade		Gold	1 year	4/4/2013			

Documentation

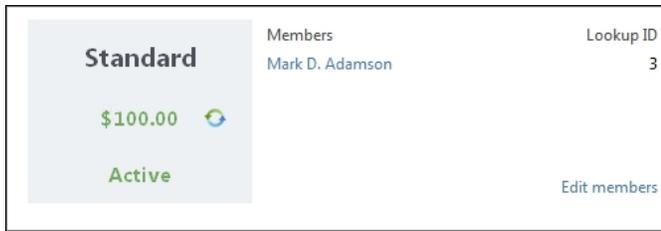
[Open file](#) [Notification](#) [Add](#) [Edit](#) [Delete](#)

On the Membership page, you view all the information about the membership for the constituent. This includes information such as the membership program and level, member ID, status and type, member since date, and the membership level terms. Depending on your security rights and system role, you perform functions to manage the membership such as add or renew a membership and cancel a membership.

Tip: Organizations, individuals, groups, and households can join memberships. When a household joins a membership, the membership information additionally appears for an individual in the household. The opposite applies. When an individual joins a membership, if the individual is a member of a household, the membership information additionally appears for the household.

The Membership page for a constituent also contains key information you need to know about the member and the membership, such as the member's primary contact information, quick links to add an interaction or renew the membership, and lists of recent member activities and membership transactions. You can also view lifetime giving information for the constituent, as well as other memberships for the constituent. You can view a list of benefits and recently sent items, which includes membership cards. You can also view documentation for the member. In addition, you can view or edit the comments or transaction notes from the membership transaction, as well as the current add-ons for the membership.

If the constituent paid with a credit or debit card and wanted the membership to automatically renew, the Flagged for auto-renew icon appears in the main summary section.



Summary Section for a Constituent Membership

On a constituent membership page, you can view a summary section of information related to the membership. You can view the membership level, the amount of dues or the lowest level of contributions for the membership, and the membership status. You can also view the members listed for the membership, along with their lookup IDs. In addition, you can view information about the expiration date or recent and upcoming payments, when applicable.

If the constituent paid with a credit or debit card and wanted the membership to automatically renew, the Flagged for auto-renew icon appears in the main summary section.

You can run the Update Membership Status global change to go through your membership programs and update the members' statuses automatically based on the rules for the renewal window for the programs. For more information, see [Manage Renewal Information for Membership Programs on page 27](#).



From this summary panel, you can click:

- **Edit members** to edit the members listed for the membership.
- **Add interaction** to add an interaction with the constituent.
- **Issue member card** to issue a membership card.

Primary Member and Constituencies

On a constituent membership page, you can view a Primary member section of information related to the primary member for the membership. You can view the member's primary address, phone number, and email address. You can hover over each piece of contact information and click **Edit** to make changes. If you click **Contact information**, you go to the Contact tab of the constituent record.

You can also view the member's constituencies in the Additional details section. If you click **Communication preferences**, you go to the Preferences tab on the constituent's Communications page.

Lifetime Information Section

On a constituent membership page, you can view a Lifetime information section which includes the total membership amount and the last renewal.

Other Memberships Section

On a constituent membership page, you can view an Other memberships section which includes other memberships for the constituent. You can click on each membership to view the membership page. Click **Add membership** to add an additional membership for the constituent.

Constituent Membership Cards

On a constituent membership page, you can view a list of membership cards issued. With membership cards, there are several tasks you can perform.

- [Issue New Membership Card on page 64](#)
- [Print Membership Cards on page 88](#)
- [Clear Membership Card Print Status on page 64](#)
- [Assign Membership Card Number on page 65](#)
- [Edit Membership Card on page 65](#)
- [Cancel Membership Card on page 65](#)
- [Delete Membership Card on page 65](#)

Membership and Transaction Comments

On a constituent membership page, you can view a summary panel of the notes associated with the transaction and with the membership details. From this panel, you can also edit the comments.

Current Add-ons

On a constituent membership page, you can view current add-ons associated with the membership. You can filter this list to include inactive or expired add-ons if needed.

Recent Member Activities Section

On a constituent membership page, you can view a list of recent member activities, which includes interactions and event registrations. You can click on the description of each item to open the interaction or event registration. Click **View all activities** to go to a list of all interactions and event registrations.

Benefits and Sent Items Section

On a constituent membership page, you can view a list of benefits and sent items, which includes recent mailings. Click **View all benefits and items** to go to a list of all benefits and items sent for this membership.

Recent Membership Transactions Section

On a constituent membership page, you can view a list of recent membership transactions. You can select a recent membership transaction and click **Edit** to manually adjust the level, term, transaction date, and expiration date. Updating details on the Edit a membership transaction screen does not change the actual revenue transaction. Click **View complete revenue history** to go to the Revenue History tab on the Revenue and Recognition page of the constituent.

Edit Recent Membership Transactions

You can edit recent membership transactions from the constituent's membership page. When you edit the transaction, you can change the level and term, as well as the transaction and expiration dates. You can also edit gift details and enroll the member in automatic renewals.

From the Membership tab of a constituent record, click a membership program name. On the membership page, under **Recent membership transactions**, select the transaction and click **Edit**.

Membership Attributes Section

On a constituent membership page, you can view a summary panel of attributes related to the membership. From this attributes panel, you can manage add, edit, and delete attributes. With membership attributes, you can store additional information about the membership.

To set up attribute categories, go to *Administration* and click **Attribute categories** under **Data**.

➤ Add a membership attribute

You can use membership attributes to track additional information about the membership. These attributes are displayed on the constituent membership page.

1. From the constituent membership page, click **Add** under **Attributes**. The Add membership attribute screen appears.

2. Select the attribute category. To set up attribute categories, go to *Administration* and click **Attribute categories** under **Data**.
3. Enter a value for the attribute.
4. Enter start and end dates for the attribute, if needed, as well as any comments.
5. Click **Save**. The attribute appears on the constituent membership page.

Documentation Section

On a constituent membership page, you can view a summary section of documentation related to the membership. From this documentation panel, you can manage notes, links, and attachments, in the same way you manage these items on the Documentation tab of a record.

Membership and Membership Card Tasks

Memberships have several tasks you can use, such as **Transfer** to transfer the membership from one constituent to another. When you view membership benefits and sent items (including membership cards), you have several actions you can perform with the membership cards.

Edit Members for a Membership

After you add a membership, you can edit the members. From the summary section on Membership tab or the membership page, click **Edit members**. On the Edit members screen, you can indicate which member is the primary member, as well as change the members. You cannot change the number of members allowed or add more members than the membership program and level allow. You cannot remove a member if the member is marked as the primary member.

Edit Membership Details

After you add a membership, you can edit details such as the level, term, expiration date. From the summary section on Membership tab or the membership page, click **Other tasks** and select **Edit membership details**. For recurring and lifetime programs, you cannot edit the term or the expiration date.

Note: Only active levels are available when you edit membership details.

Edit Membership ID

The membership ID is the primary identifier for the member used by your organization. On the constituent's membership page, the ID appears on the Memberships tab. On the membership details page, the ID appears in the profile summary at the top of the page.

When you add a membership, the membership ID is generated automatically by the program. The next available membership ID is assigned. Membership IDs are unique for each membership. If the membership is canceled or deleted, the ID is not used again by the program for another membership.

To customize a membership ID for a constituent, edit the ID assigned by the program. On the constituent's membership page, click **Edit membership ID** under **Other tasks**. The Edit membership ID screen appears. In the **Membership ID** field, edit the ID as necessary.

Edit Renewal Information for a Gift of Membership

When a gift of membership is given to a constituent, you can go to the primary member's membership record to change the renewal information.

On the constituent's membership page, click **Edit renewal information** under **Other tasks**. The Edit renewal information screen appears. In the **Send renewal notice to** field, you can select the notice should go to the constituent who made the initial gift of membership, to the primary member, or to both constituents. In the **Given by** field, you can view the constituent who made the gift.

Note: When you make a membership a gift, this screen appears as **Make membership a gift**.

Mid-term Upgrade for a Membership

You can sell an upgrade to a membership during the membership, but prior to the renewal window. In order to be eligible for an upgrades, the membership must be changing from one level to a higher level, such as from Individual to Family, or from a shorter term to a longer term. You cannot upgrade a membership from one membership program to another.

When you upgrade a membership, the membership retains the expiration date which is the furthest out from the current date. If that date is not correct, you can manually adjust it.

Only memberships that are paid in full are eligible to be upgraded.

When you upgrade a membership, the price of the membership is used to determine the balance the member owes to purchase the upgrade. If an annual, dues-based membership was purchased for \$50 and the next level is \$75, the member can pay the \$25 difference for the upgrade.

The only payment option available for an upgrade is "Pay in full."

If a membership is eligible to be upgraded, an **Upgrade now** button appears for the membership on the constituent's Memberships tab and on the constituent membership page. The only level and term options available are ones that change the membership to a higher level with same or longer term or to a longer term at the same level.

When a membership is upgraded, any add-ons restricted to one per membership are not available if one is already associated with the membership. Add-ons that weren't previously purchased or ones that can be purchased more than once per membership are available. Any benefits associated with the upgraded level are included in the upgrade transaction unless they are manually removed.

Transfer Membership

To transfer a membership and all related history from one constituent to another, go to the constituent's membership record and under **Other tasks**, click **Transfer membership**. The Transfer membership screen appears. In the **New primary member** field, click the binoculars to select the constituent who receives the transfer of membership.

Note: The primary member must be a constituent in the database and the membership program must be active. If the constituent is already a member of the program, or the member program is inactive, you cannot transfer the membership.

Click **Save**. The membership is removed from the first constituent and has been transferred to the constituent you selected.

Renew a Membership

When a membership expires, a **Renew now** button appears on the constituent's membership page. When you click **Renew now**, you can select the membership dues batch to add the renewal transaction. For more information, see [Membership Dues on page 67](#).

Rejoin a Membership

When a membership is lapsed or dropped, the **Rejoin** button appears. After you rejoin the membership, the membership status becomes active. When you click **Rejoin**, you can select the membership dues batch to add the rejoin transaction. For more information, see [Membership Dues on page 67](#).

Cancel a Membership

To cancel a membership, go to the Membership tab of constituent record. For the membership, click **Other tasks** and select **Cancel membership**. When you cancel a membership, select a reason code for the cancellation. To manage membership cancellation reason codes, from *Memberships*, click **Reason codes** under **Configuration**.

Issue New Membership Card

You can issue a new membership card for a member. On the Issue new card screen, in **Member**, the name of the primary member defaults in, but you can select a different member for the membership if there is one. In **Name on card**, you can select the name format to use for the card. In **Expires on**, the expiration date for the membership is displayed, but you can change it if necessary. You can also enter any comments.

You are allowed to issue as many cards as the membership level allows. If the membership level allows one card and a card has already been issued, you will not be able to issue another card until you cancel the first card. For information, see [Cancel Membership Card on page 65](#).

Clear Membership Card Print Status

Once you print a membership card, you can clear the print status if you need to reprint the card. When you add a membership card, the status of the card is "Issued." Once it is printed, the status is "Printed." If you need to reprint a card, you must click **Clear print status** to have the status reset to "Issued."

Assign Membership Card Number

You can associate a card number with the membership card. On the Assign card number screen, enter the card number and click **Save**.

Edit Membership Card

You can edit a membership card for a member. On the Edit membership card screen, in **Member**, the name of the primary member defaults in, but you can select a different member for the membership if there is one. In **Name on card**, you can select the name format to use for the card. In **Expires on**, the expiration date for the membership is displayed, but you can change it if necessary. You can also enter any comments.

If you edit a membership card and need to reprint it, see [Clear Membership Card Print Status on page 64](#).

Cancel Membership Card

You are allowed to issue as many cards as the membership level allows. If the membership level allows one card and a card has already been issued, you will not be able to issue another card until you cancel the first card. When you click **Cancel membership card**, the membership card status is set to "Canceled." Once canceled, you can issue another membership card.

Delete Membership Card

You are allowed to issue as many cards as the membership level allows. If the membership level allows one card and a card has already been issued, you will not be able to issue another card until you cancel or delete the first card. Only cards with a status of "Issued" can be deleted. When you click **Delete**, the membership card is removed and no record of the card being issued remains. You can also cancel a membership card. For more information, see [Cancel Membership Card on page 65](#).

Remove Gift Membership Status

To remove a gift status on a membership, go to the constituent's membership record and under **Other tasks**, click **Remove gift status**. A confirmation screen appears. If the membership was set to auto-renew, an additional confirmation screen appears to see if you want to keep the membership on auto-renewal.

Note: You can also access this feature on the membership tab of a constituent record.

Make Membership a Gift

To make a membership a gift, go to the constituent's membership record and under **Other tasks**, click **Make membership a gift**. The Make membership a gift screen appears. Select who to send the renewal notice to and who the gift was given by and click **Save**. For information about this screen, see [Edit Renewal Information for a Gift of Membership on page 63](#).

Note: You can also access this feature on the membership tab of a constituent record.

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From *Memberships and Revenue*, you can add membership dues transactions received from constituents, such as to join or renew memberships or purchase memberships as gifts for others. When you add a payment for membership dues, you enter information about the membership, its members, and any additional information such as benefits or add-ons. Additionally, if a payment applies to more than only the membership, such as a payment that includes a donation to your organization, you can enter information about how to apply the payment. You can enter a single payment or multiple payments at one time.

If you want to add multiple membership transactions at one time, you select the membership dues batch template to use with the payments. The template determines the fields available and any default values. For example, you may set up a batch template for each membership program. The template also includes the batch workflow, which determines the steps your organization requires before you commit the

payments to your database. For example, your organization may require a review and approval process for all membership dues payments.

Membership transactions are supported using the Add a membership screen, as well as the membership dues batch. Membership transactions are not supported in other revenue batches.

Warning: You cannot apply a payment toward multiple memberships. For example, you cannot apply a payment to both a gift of membership and a membership join or renewal.

Membership Dues Workflow

From *Memberships*, click **Add a membership** to add a single membership transaction. From *Memberships, Revenue, and Batch entry*, you can add multiple payments to apply toward membership dues, such as for a renewal, join, or gift of membership. When you add a membership transaction, you can answer a series of questions to add one or more payments as a membership dues batch. From *Batch entry*, you can enter one or more payments as a membership dues batch through a standard batch data entry grid. When you add payments as a batch, your organization can apply a batch workflow, such as to require a review and approval process. You can also set field defaults or hide fields as necessary to ease data entry.

To successfully enter payments for membership dues, you must perform several steps.

- From *Administration*, select **Batch** and then **Batch entry**. Under **Configuration**, click **Batch numbering schemes** to create a numbering scheme to use with membership dues batches. The batch numbering scheme determines whether you manually assign identification numbers to these batches or the program automatically assigns the batch numbers.
- From *Batch entry*, click **Batch workflows** under **Configuration** to create a workflow to use with membership dues batches. The batch workflow determines the steps required to commit batch information to the database. For example, your organization may require a review and approval process for membership dues payment information.
- From *Batch entry*, click **Batch templates** under **Configuration** to create a template to use with membership dues batches. The template includes any field defaults and determines the batch numbering scheme and workflow to use with batches created from the template. Your organization may create multiple templates for membership dues batches. For example, you may create separate templates with defaults based on membership programs or levels.
- To add a payment for membership dues, enter the dues as a batch from *Memberships, Revenue, or Batch entry*. When you start to enter membership dues payments in a batch, you select which template to use to capture the information. For information about how to enter membership dues payments, see [Enter Membership Dues Payments on page 75](#).
- From *Batch entry*, you can perform several tasks to manage aspects of membership transactions, such as members, add-ons, and donations. For information about how to manage this information within a membership dues batch, see [Membership Dues Batch Tasks on page 79](#).
- After you commit the membership dues batch, manage information about its payments as necessary from their transaction records in *Revenue*.

Add a Membership

From *Memberships*, click **Add a membership** to add a single membership transaction. You can enter and save a single membership transaction. When you save the Add a membership screen, the membership and the membership revenue transaction are immediately created.

To enter multiple memberships at one time, you can use the Enter membership dues batch. Batch entry gives you added convenience, control, and audit trail than the one-off screen. For more information, see [Add Membership Dues Batches on page 76](#).

➤ Add a membership

1. From *Memberships*, click **Add a membership** under **Tasks**. The Add a membership screen appears. For information about the items on this screen, see [Add a Membership Screen on page 71](#).

2. Select whether to create the dues for a membership for the constituent or toward a gift of membership for another constituent.

If you select **Giving a membership to someone else**, enter information about the gift of membership.

- a. In the **Name** field, search for and select the constituent to receive the membership as the primary member. You can search for the constituent by name, lookup ID number, or telephone number.
- b. In the **Send renewal to** field, select whether to send renewal notices to the giver, the primary member, or both.
- c. Select whether the constituent pays for the gift of membership anonymously.

3. Under **Who is paying for this?**, enter information about the constituent who pays the membership dues.
 - a. Search for and select the name of the constituent who pays the membership dues. Or, if you receive the payment in response to a membership renewal effort, enter the finder number from the reply form to identify the constituent.
 - b. In the **Date** field, select the date of the payment. For example, select the current date or the date you receive the payment.
 - c. If you receive the payment in response to a membership renewal effort, search for and select the effort to track its effectiveness.

Note: If you identify the constituent by finder number or source code, the **Effort** field automatically displays the membership renewal effort and appeal.

- d. Under **Transaction notes**, enter any additional information to track about the membership transaction.
4. Under **What are they paying for?**, enter information about the membership to apply the payment toward.
 - a. Select whether to use the payment to add, renew, or upgrade a membership.
 - b. Select the program, level, and term of the membership transaction.
 - c. By default, the **Expires on** field displays the expiration date of the membership, based on the transaction date and term of the program. Edit the expiration date as necessary.
 - d. By default, the **Amount** field displays the cost of the membership dues, based on the program, level, and term. Edit the membership amount as necessary. If you want to reduce the amount of the transaction, consider using promotions instead of manually changing the transaction amount.
 - e. If the membership program allows auto-renewals, you can select **Renew this membership automatically when it expires. (Credit card required)** to enroll the member.
5. Select whether to apply a membership promotion to the transaction. If you select to apply a promotion, enter the applicable promotion code.
6. If the membership program allows add-ons such as guest passes, select the add-ons to include in the transaction.
7. If the selected program level allows multiple members, under **Who should be included on this membership?**, search for and select the constituents to include as members. If the membership program allows child members, under **Number of children**, search for and select the constituents to receive child memberships.
8. Under **Which members should receive a card?**, select the members to receive membership cards. For each member selected, enter the name to appear on the card and adjust the expiration date as necessary.
9. If the payment includes a donation to your organization in addition to the membership dues, enter information about the donation.
 - a. Under **Are they also giving a donation?**, select **Add a donation of**, enter the donation amount, and select whether the constituent gives the donation anonymously.
 - b. Search for and select the designation to which to apply the donation.

- c. In the **Category** field, select the category for the donation amount, such as Membership Giving. Your system administrator configures the selections available for this field.
 - d. To credit solicitors with the donation, in the **Solicitors** field, click **Edit**. On the Solicitors screen, search for and select the solicitors to associate with the donation and how much credit each receives for the donation amount.
 - e. In the **Recognition** field, the default recognition credits for the constituent appear. To edit the recognition credit associated with the donation, click **Edit**. On the Recognition credits screen, search for and select the constituents to receive recognition credit. For each constituent, select the type, effective date, and amount of recognition credit received and the designation to which to apply the credit.
10. Under **How are they paying?**, enter information about how you receive the payment, such as by check or credit card. If this is a recurring membership and you chose to create the recurring gift, but not make the first payment, you can still enter credit or debit card information. The token will be saved to use for future recurring gift payments for the membership.
 11. Select whether to send an acknowledgement to the constituent for the payment.
To apply the revenue to a tribute, search for and select the tribute.
 12. The **Total amount** field displays the total amount of the payment. In the **Tax deductible amount** field, enter the monetary value of the payment, such as for a receipt. For example, if the constituent receives benefits for the payment, this amount is the total amount minus the total benefit amount.
 13. Select whether to send a receipt for the payment.
 14. Click **Save**. The record of the payment appears and the membership record has been created.
For information about the items on the payment record, see the *Revenue Guide*.

Add a Membership Screen

This table explains the items on the Add a membership screen. These fields also appear on the Enter membership dues batch screen. For information about how to access these screens, see [Add a Membership on page 69](#) and [Membership Dues on page 67](#).

Screen Item	Description
What are you doing with this payment?	Select whether the constituent provides the payment to pay for a personal membership or for a gift of membership for another constituent.

Screen Item	Description
Who is the membership being given to?	<p>If you select Giving a membership to someone else, this section appears.</p> <p>In the Name field, search for and select the constituent to receive the gift of membership as the primary member. You can search for the constituent by name, lookup ID, or telephone number. Select whether to send renewal notices to the giver, the primary member, or both.</p>
Who is paying for this?	<p>Specify the constituent that provides the payment. You can search for and select the constituent in the Name field or, if you receive the payment in response to an appeal mailing or membership renewal effort, enter the finder number from the reply form.</p> <p>In the Date field, select the date of the payment, such as the date you receive it or the date you add it to the database.</p> <p>If you enter the finder number to specify the constituent, its appeal mailing or membership renewal effort appears under Marketing information. To associate the payment with a mailing or effort, search for and select the communication. You can also enter a source code. The related appeal and effort appear under Marketing information.</p> <p>In the Inbound channel field, select how you receive the payment, such as by Mail, Phone, or Walk-in.</p> <p>In the Transaction notes box, enter any additional information about the membership transaction.</p>

Screen Item	Description
What are they paying for?	<p>Select how to apply the payment toward the membership dues, such as for a join or renewal, and select the applicable membership program, level, and term as necessary. If paying for a lifetime or recurring program, the term is replaced with the payment options.</p> <p>When you select the membership program, the Benefits field displays any default benefits the constituent receives for the transaction. If the selected membership program and level assign benefits based on the number of members, the quantity of benefits received matches the maximum number of members allowed for the selected level.</p> <p>In the Expires on field, the expiration date of the membership appears, based on the selected program, level, and term. Edit the expiration date as necessary.</p> <p>In the Membership amount field, the total amount of the membership dues appears, based on the selected program, level, and term. Edit the amount as necessary.</p> <p>If the membership program allows auto-renewals, you can select Renew this membership automatically when it expires. (Credit card required) to enroll the member.</p> <p>If an installment plan has been created and you are making a payment toward it, the payment options include: Pay in full, Pay next installment, and Pay other amount. When you select Pay other amount, you enter the amount of the payment.</p> <ul style="list-style-type: none"> • If the amount is less than the next installment amount, the next installment is partially paid. • If the amount is greater than the next installment, but less than the balance remaining for the installment plan, the amount is applied to the remaining installments, in order. If you want any additional amount to count as a donation instead of a payment toward the next installment amount, you can still use the "Are they also giving a donation" fields on the screen. • If the amount is greater than the balance remaining for the installment plan, the installment plan is fully paid and the user is prompted for the remaining amount to become an additional donation.
Is there a discount or promotion?	<p>Select whether to apply a discount or promotion toward the cost of the membership.</p> <p>To apply a discount or membership, select Yes, apply the following discount and select the discount or enter the applicable promotion code.</p>
Do they want any add-ons?	<p>If the selected membership program offers add-ons, select the add-ons to include with the membership. The Total add-on amount field displays the total cost of the selected add-ons.</p>
Who else should be included on this membership?	<p>If the selected membership program level allows multiple members, such as a Family level, select the constituents to include as members and enter the number of children to include.</p>

Screen Item	Description
Which members should receive a card?	<p>Select which members receive membership cards. For each selected member, enter the name to appear on the card and adjust the expiration date as necessary.</p> <p>Select Send reminders to make installment plan reminders available to be included in pledge reminder processes.</p>
Are they also giving a donation?	<p>If the payment includes a donation to your organization in addition to the membership dues, select Add a donation of and enter the amount of the payment to apply as a donation.</p> <p>Search for and select the fundraising designation to apply the donation amount toward.</p> <p>To group the donation with similar donations, select the applicable category. For example, your organization may have a Membership Donations category to easily track donations received from members.</p> <p>To credit solicitors with the donation, in the Solicitors field, click Edit, select the solicitors and enter how much credit each receives.</p> <p>In the Recognition field, the default recognition credits for the selected constituent appear. To edit the recognition credit for the donation, click Edit.</p>
How are they paying?	<p>Select the payment method used for the payment, such as Cash, Check, or Credit card, and enter details about the method.</p> <p>If this is a recurring membership and you chose to create the recurring gift, but not make the first payment, you can still enter credit or debit card information. The token will be saved to use for future recurring gift payments for the membership.</p>
Are there any special instructions?	<p>To exclude the membership dues payment when you run the process to generate acknowledgements, select Do not acknowledge.</p> <p>If the constituent requests to pay for the membership anonymously, select Is anonymous.</p> <p>To apply the revenue toward a tribute, search for and select the tribute.</p>
Total amount	This field displays the total amount of the payment, based on the membership dues amount and any add-ons and donations or other applications.
Tax deductible amount	<p>This field displays the tax-deductible portion of the total amount. For example, if the constituent receives benefits for the membership transaction, this amount is the total amount of the payment minus the benefit value.</p> <p>For a renewal transaction, the amount set for the selected level appears.</p> <p>Edit the tax-deductible portion of the payment amount as necessary.</p>
Do not receipt	Select whether to create a receipt for the payment.

Membership Dues Constituent Search

When you add a membership dues transaction, you can search for constituents, such as to identify who makes the payment, receives a gift of membership, or to include as a member. In the **Name** field, you can enter the constituent's lookup ID, phone number, or name to begin the search. For more search criteria,

such as address, alternate lookup IDs, or constituent type, you can access the Membership Dues Constituent Search screen.

Note: To help save time, all of the checkboxes on the search form, such as the ones to include inactive or deceased constituents, are sticky. Your settings carry over to the next time you use the search screen. For example, you can search for a member with the last name "Smith" and choose to include individuals (not organizations) and also to include inactive constituents. The next time you perform a member search the last name criteria is removed but the individual and inactive checkboxes remain marked.

Enter Membership Dues Payments

From *Memberships*, you can add payments toward membership dues, such as to renew or join a membership or give a gift of membership.

From *Memberships* and *Revenue*, you can add multiple payments at one time by using a membership dues batch. To enter multiple membership transactions at one time, you create a batch of the payment transactions so your organization can apply a batch workflow that requires a review and approval process as necessary. To view and manage your membership dues batches from *Memberships* or *Revenue*, click **Enter membership dues**.

The screenshot shows the 'Enter Membership Dues' interface. It has two tabs: 'Uncommitted Batches' (selected) and 'Committed Batches'. Below the tabs, there is a toolbar with icons for Add, Edit, Update status, Commit, Delete, and a printer icon. Below the toolbar is an 'Owner:' dropdown menu and 'Apply' and 'Reset' buttons. A table displays uncommitted batches with columns for Batch number, Description, Owner, Status, and Date added. The first row shows batch number 2, description 'Membership Dues Batch', owner 'Steve Stegelin', status 'Default', and date added '11/30/2011'. Below the table, there is a section for 'Batch type: Membership Dues Batch', 'Date changed: 11/30/2011', and 'Comments:'. The second row of the table shows batch number 3, owner 'Steve Stegelin', status 'Default', and date '12/1/2011'.

Batch number	Description	Owner	Status	Date added
2	Membership Dues Batch	Steve Stegelin	Default	11/30/2011
Batch type: Membership Dues Batch Date changed: 11/30/2011 Comments:				
3		Steve Stegelin	Default	12/1/2011

On the Enter Membership Dues page, you can manage your in-progress, or uncommitted, batches and your finalized, or committed, batches of membership dues payments. You can also enter data into your membership dues batches and process the batches through their workflows. To help you manage your membership dues batches, the Enter Membership Dues page contains separate tabs for uncommitted and committed batches.

Uncommitted Membership Dues Batches

On the Uncommitted batches tab of the Enter Membership Dues page, you can view and manage the membership dues batches that are available for data entry. Under **Uncommitted batches**, you can view the number, owner, and status of each uncommitted membership dues batch.

Tip: To limit the number of batches that appear in the grid, you can filter the grid to view only those assigned to a specific owner. In the **Owner** field, select the user assigned to the batches to view and click **Apply**. To remove the filter and view all membership dues batches, click **Reset**.

Depending on the workflow status of the batch and your security rights and system role, you can perform several tasks to manage uncommitted batches. For example, you can add and edit uncommitted batches to enter membership dues payments. When a batch completes its step in the workflow, you can update its status or commit the batch, based on its workflow. You can also delete uncommitted batches as necessary.

Add Membership Dues Batches

From *Memberships* and *Revenue*, you can add membership dues batches to enter payments applied toward membership dues, such as for a renewal, join, or gift of membership. When you start to add a membership dues batch, you select the template to use with the batch. The template determines the fields available and any default values. For example, you may set up a batch template for each membership program. The template also includes the batch workflow, which determines the steps your organization requires before you commit the payments to your database. For example, your organization may require a review and approval process for all membership dues payments.

When you add a payment for membership dues, you enter information about the membership, its members, and any additional information such as benefits or add-ons. Additionally, if a payment applies to more than only the membership, such as a payment that includes a donation to your organization, you can enter information about how to apply the payment.

Warning: You cannot apply a payment toward multiple memberships. For example, you cannot apply a payment to both a gift of membership and a membership join or renewal.

➤ Enter multiple membership transactions

1. From *Memberships* or *Revenue*, click **Enter membership dues** under **Tasks**. The Enter Membership Dues page appears.
2. On the Uncommitted batches tab, click **Add**. The Add a batch screen appears.
3. Select the membership dues batch template to use to create the batch.

Tip: The template determines the fields available to enter payments into the batch. To adjust the template, such as to set any field defaults or hide selected fields, click **Field options**.

4. Enter the properties of the batch, such as its batch number, description, owner, and any projected totals or amounts.

Tip: If the numbering scheme of the template assigns batch numbers, it automatically appears in the **Batch number** field. To manually enter a batch number, select **Override** and enter the number to assign the batch.

5. Click **Save**. The Enter membership dues screen appears. Most of the items on this screen are the same as the Add a membership screen. For more information, see [Add a Membership Screen on page 71](#).

What are you doing with this payment?

Paying for a membership Giving a membership to someone else

Who is the membership being given to?

Name: Betsy Abrahms Send renewal to: Giver

Who is paying for this?

Douglas Abrahms Finder number: Date: 4/5/2012

Marketing information:

Appeal: Effort: Inbound channel:

Transaction notes:

Do not receipt Tax deductible amount: \$0.00 Total amount: \$30.00

Summary - Batch # 10

Bill to	Total
Elizabeth A. Ashton	\$55.00
Julie M. Bach	\$250.00
Dorothea A. Camp...	\$10.00
Caitlin Aburrow	\$20.00
Kelly A. Vaughn	\$350.00

Projected total 1
Current total 5
Projected amount \$55.00
Current amount \$685.00
Update projected totals

Note: The batch template determines the fields available on the Enter membership dues screen. If you hide fields in the template, they may not appear on the screen.

6. For each membership dues transaction, enter information about its membership and payment.
 - a. Select whether to create the dues for a membership for the constituent or toward a gift of membership for another constituent.

If you select **Giving a membership to someone else**, search for and select the constituent to receive the membership, and select who receives renewal notices.

- b. Under **Who is paying for this?**, search for and select the name of the constituent who pays the membership dues. Or, if you received the payment in response to a membership renewal effort, enter the finder number from the reply form to identify the constituent.

In the **Date** field, select the date of the payment. For example, select the current date or the date you received the payment.

If you received the payment in response to an appeal or membership renewal effort, search for and select the appeal or effort to track its effectiveness.

Note: If you identify the constituent by finder number, the **Appeal** or **Effort** field automatically displays the communication associated with the finder number.

In the **Inbound channel** field, select the channel through which you received the payment, such as Mail, Phone, or Walk-in.

Under **Transaction notes**, enter any additional information to track about the transaction.

- c. Under **What are they paying for?**, select whether to use the payment to add, renew, or upgrade a membership.

Select the program, level, and term of the membership transaction.

By default, the **Expires on** field displays the expiration date of the membership, based on the transaction date and term of the program. Edit the expiration date as necessary.

By default, the **Amount** field displays the cost of the membership dues, based on the program, level, and term. Edit the membership amount as necessary.

- d. If the membership program allows auto-renewals, you can select **Renew this membership automatically when it expires. (Credit card required)** to enroll the member.
- e. Select whether to apply a membership promotion to the transaction. If you select to apply a promotion, enter the applicable promotion code.
- f. If the membership program allows add-ons such as guest passes, select the add-ons to include in the transaction.
- g. If the selected program level allows multiple members, under **Who else should be included on this membership?**, search for and select the constituents to include as members and enter the number of children to include.
- h. Under **Which members should receive a card?**, select the members to receive membership cards. For each member selected, enter the name to appear on the card and adjust the expiration date as necessary.
- i. If the payment includes a donation to your organization in addition to the membership dues, under **Are they also giving a donation?**, enter information about the donation.
- j. Under **How are they paying?**, enter information about how you receive the payment, such as by check or credit card. If this is a recurring membership and you chose to create the recurring gift, but not make the first payment, you can still enter credit or debit card information. The token will be saved to use for future recurring gift payments for the membership.
- k. Select whether to send an acknowledgement to the constituent for the payment.
If the constituent requests to pay for the membership anonymously, select **Is anonymous**.
To apply the revenue to a tribute, search for and select the tribute.
You can also select the post status and date.
- l. The **Total amount** field displays the total amount of the payment. In the **Tax deductible amount** field, enter the monetary value of the payment, such as for a receipt. For example, if the constituent receives benefits for the payment, this amount is the total amount minus the total benefit amount.
- m. Select whether to send a receipt for the payment.
- n. Click **Next Payment**. Under **Summary - Batch #**, the payment appears.

Tip: To quickly clear all information entered for a payment before you add it to the batch, click **Clear**.

7. To view the payments in a standard batch data entry grid, such as to verify correct data entry, click **Review**. The batch data entry screen appears and displays the membership dues batch.

Tip: To edit the number, description, owner, or projected totals of the batch, click **Edit properties**. To update the projected totals to match the current actual totals, click **Update projected totals**.

You can change the post status of a membership transaction from the batch grid, but not from the Enter membership dues screen. To return to the Enter membership dues screen, select the Main tab on the batch ribbon bar and click **Return to form** under **Processes**.

8. After you add all payments to the batch and verify correct data entry, click **Done** to save and close the batch. You return to the Enter Memberships Dues page.

Warning: If the batch contains payments by credit card or direct debit, you must process these transactions before you commit the batch. To process credit card transactions from the Enter Membership Dues page, click **Credit Card Processing** under **Tasks**. To process direct debit transactions, click **Generate direct debit file process** under **Tasks**. For information about how to process credit card or direct debit transactions, see the *Revenue Guide*.

You can manage the batch as necessary from the Enter Memberships Dues page or *Batch entry*.

Committed Membership Dues Batches

On the Committed batches tab of the Enter Membership Dues page, you can view the membership dues batches that are committed to the database. When you commit a batch to the database, the program uses its data to create records of the membership dues payments to the database. Under **Uncommitted batches**, you can view the number, owner, and status of each uncommitted membership dues batch.

To limit the batches that appear, you can filter the grid by the date the batches commit to the database and select whether to include deleted batches. To filter the grid, select the criteria of the batches to view and click **Apply**. To remove the filter and view all batches, click **Reset**.

Depending on the workflow status of the batch and your security rights and system role, you can perform several tasks to manage committed batches. For example, you can open the batch to view its data or delete a committed batch as necessary.

Membership Dues Batch Tasks

When you manage a membership dues batch from *Batch entry*, the **Membership Information** window on the batch data entry screen displays detailed information about a selected membership transaction, such as its members and any benefits or add-ons. To edit this information for a selected membership, such as to add members or add-ons, select the Dues tab. From this tab, you perform several tasks to manage this information.

Manage Members and Membership Cards in a Membership Dues Batch

If the membership program and level allow multiple members, you can manage the members and membership cards to include from a membership dues batch.

On the Additional members screen, search for and select the constituents, by name or lookup ID, to include as members. After you select the members to include, click **OK** to return to the batch data entry screen.

➤ Manage members and membership cards

1. On the batch data entry screen, select the membership with the members or membership cards to manage.

- On the Dues tab, click **Members and cards** under **Members** on the ribbon bar. The Members and cards screen appears.

Members and cards

Additional members:

Name	Relationship	Lookup ID
Anne Adamson	<None>	

Members receiving cards:

Remove card

Member	Name on card	Expiration da..
Mark D. Adamson	Mark D. Adamson	10/31/2015
Anne Adamson	Anne Adamson	10/31/2015

Help OK Cancel

- Under **Additional members**, specify the constituents to include as members. You can select constituent relationships of the primary member, or you can search for and select constituents as necessary.
- Under **Members receiving cards**, select which members receive membership cards if the membership level includes multiple cards. For each member selected, enter the name and expiration date to appear on the card.

Note: If you add the wrong constituent to the grid, you can select the row and click **Remove card**.

- Click **OK**. You return to the batch data entry screen.

Manage Benefits in a Membership Dues Batch

From a membership dues batch, you can manage the benefits the constituent receives in response to a membership transaction. For example, your organization may offer items such as t-shirts, coffee mugs, or stickers as incentives for memberships. If a membership program level has benefits associated with it, the member will receive those benefits by default.

Tip: If the selected membership program and level assign benefits based on the number of members, the default quantity of benefits received for a transaction matches the maximum number of members allowed for the selected level. For example, if you add a transaction that includes three members and select a level that allows up to four members, the transaction receives benefits for four members. You can edit the quantity of benefits associated with the transaction as necessary.

Note: Add-ons and benefits are similar. Benefits are things like items members automatically receive with their memberships or membership levels. Add-ons are optional offerings members can "add on" to their membership, for an additional cost or not depending on the item.

➤ Manage benefits for a membership in a dues batch

1. On the batch data entry screen, select the membership with the benefits to manage.
2. On the Dues tab, click **Benefits** on the ribbon bar. The Benefits screen appears.
3. In the grid, search for and select the benefits that the constituent receives for the membership transaction.
4. For each benefit, enter the quantity the constituent receives. The **Total fair market value** field displays the total value of the benefits received. The fair market value is set up when you manage benefits from the **Benefits catalog** in *Memberships*.
5. In the **Tax deductible amount** field, edit the tax-deductible value of the membership if necessary. By default, the tax deductible amount is the cost of the membership minus the monetary value of any membership-related benefits.

Tip: To quickly remove all tax-deductible benefits from the transaction, click **Remove tax deductible benefits**. To remove all benefits from the transaction, click **Remove all benefits**.

6. Click **OK**. You return to the batch data entry screen.

Manage Add-ons in a Membership Dues Batch

From a membership dues batch, you can manage the add-ons to include in membership transactions, such as guest passes. On the batch data entry screen, select the membership and then, on the Dues tab, click **Add-ons** on the ribbon bar. The Add-ons screen appears and displays the add-ons set up for the selected membership program.

Include?	Name	Price	Quantity	Total
<input type="checkbox"/>	Addtl. Member	\$20.00	0	\$0.00
<input checked="" type="checkbox"/>	Magazine Subscription	\$10.00	1	\$10.00

Total add-on amount: \$10.00

Select the add-ons to include in the transaction and enter the quantity of each to include. The **Total add-on amount** field displays the total additional cost of the selected add-ons. After you select the add-ons to include, click **OK** to return to the batch data entry screen.

Note: Add-ons and benefits are similar. Benefits are things like items members automatically receive with their memberships or membership levels. Add-ons are optional offerings members can "add on" to their membership—for an additional cost or not depending on the item.

Manage Donations in a Membership Dues Batch

From a membership dues batch, you can manage donations included in payments toward membership transactions.

➤ Add a donation to a membership transaction in a dues batch

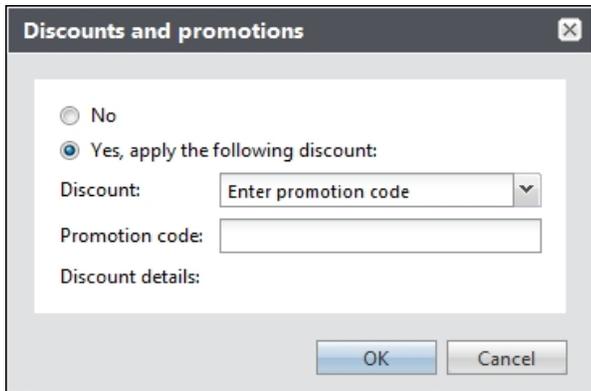
1. On the batch data entry screen, select the membership with the donation to add.
2. On the Dues tab, click **Donation** under **Options** on the ribbon bar. The Additional donation screen appears.

3. Select **Add a donation of** and enter the total monetary amount of the donation.
4. Search for and select the designation to which to apply the donation.
5. In the **Category** field, select the category for the donation amount, such as Membership Giving. Your system administrator configures the selections available for this field.
6. To credit solicitors with the donation, in the **Solicitors** field, click **Edit**. On the Solicitors screen, search for and select the solicitors to associate with the donation and how much credit each receives for the donation amount.
7. In the **Recognition** field, the default recognition credits for the constituent appear. To edit the recognition credit associated with the donation, click **Edit**. On the Recognition credits screen, search for and select the constituents to receive recognition credit. For each constituent, select the type, effective date, amount of recognition credit received, and the designation to which to apply the credit.
8. Click **OK**. Your return to the batch data entry screen.

Manage Promotions in a Membership Dues Batch

From a membership dues batch, you can manage discounts and promotions to apply toward membership transactions. For example, to increase membership enrollment, your organization may offer

reduced dues for new memberships during a specific weekend. On the batch data entry screen, select the membership and then, on the Dues tab, click **Promotion** under **Options**.



The dialog box titled "Discounts and promotions" contains the following elements:

- Radio buttons for "No" and "Yes, apply the following discount:" (selected).
- A "Discount:" label next to a dropdown menu showing "Enter promotion code".
- A "Promotion code:" label next to a text input field.
- A "Discount details:" label next to a text input field.
- "OK" and "Cancel" buttons at the bottom.

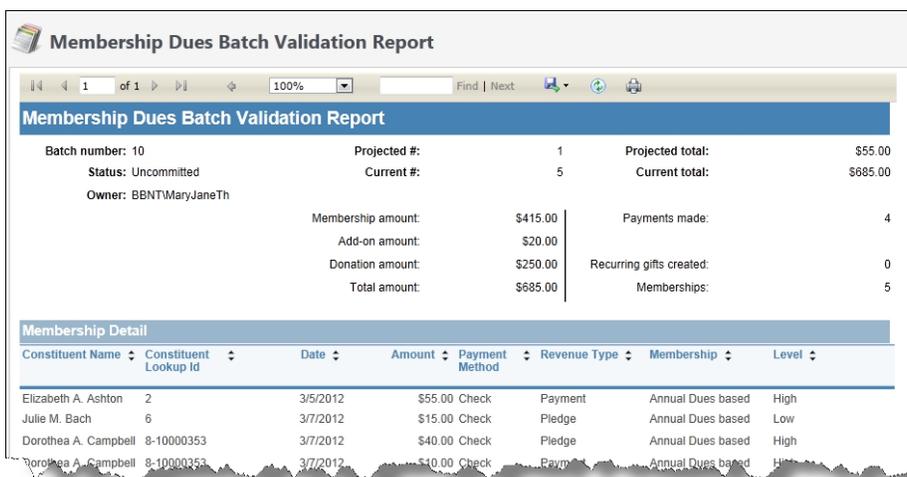
On the Membership Promotions screen, select whether to apply a discount to the membership transaction. If you select **Yes**, select the discount or enter the code of the promotion to apply. To return to the batch data entry screen, click **OK**.

Membership Dues Batch Reports

To help manage your membership dues batches, you can use reports to analyze the validation of uncommitted batches and the successful creation of membership dues transactions from committed batches.

Membership Dues Batch Validation Report

The Membership Dues Batch Validation Report displays the number and properties, including projected totals, of the batch; lists the membership dues transactions in the batch; and calculates the total count and monetary amount of the transactions.



The screenshot shows a report window titled "Membership Dues Batch Validation Report". The report includes summary statistics and a detailed table of transactions.

Membership Dues Batch Validation Report							
Batch number:	10	Projected #:	1	Projected total:	\$55.00		
Status:	Uncommitted	Current #:	5	Current total:	\$685.00		
Owner:	BBNTMaryJaneTh						
	Membership amount:	\$415.00		Payments made:	4		
	Add-on amount:	\$20.00		Recurring gifts created:	0		
	Donation amount:	\$250.00		Memberships:	5		
	Total amount:	\$685.00					
Membership Detail							
Constituent Name	Constituent Lookup Id	Date	Amount	Payment Method	Revenue Type	Membership	Level
Elizabeth A. Ashton	2	3/5/2012	\$55.00	Check	Payment	Annual Dues based	High
Julie M. Bach	6	3/7/2012	\$15.00	Check	Pledge	Annual Dues based	Low
Dorothea A. Campbell	8-10000353	3/7/2012	\$40.00	Check	Pledge	Annual Dues based	High
Dorothea A. Campbell	8-10000353	3/7/2012	\$40.00	Check	Payment	Annual Dues based	High

For each transaction, you can view its constituent, date, amount, payment method, revenue type, and membership program and level. By default, the report sorts the transactions by their order in the batch; however, you can click a column header to sort by that value.

You can view the report from the Enter Membership Dues page or Batch Entry page. On the Uncommitted batches tab, select the batch to analyze and click **Validation report** on the action bar. The Membership Dues Batch Validation Report page appears. To return to the Batch Entry page, click **Back** in your browser.

Membership Dues Batch Control Report

If you select **Create control report** when you commit a membership dues batch, you can view a control report for the committed batch. The Membership Dues Batch Control Report displays the number and properties, including projected totals, of the batch; lists the membership dues transactions in the batch that were committed to the database; and calculates the total count and monetary amount of the transactions.

Membership Dues Batch Control Report

Batch number: 6	Projected #: 1	Projected total: \$30.00
Status: Committed	Committed #: 1	Current total: \$30.00
Owner: BBNT\MaryJaneTh		
Exception batch number:	Membership amount: \$30.00	Payments made: 1
	Add-on amount: \$0.00	
	Donation amount: \$0.00	Recurring gifts created: 0
	Total amount: \$30.00	Memberships: 1

Membership Detail

Constituent Name	Constituent Lookup Id	Date	Amount	Payment Method	Revenue Type	Membership	Level
Jean H. Aertker	8-10000509	3/19/2012	\$30.00	Check	Payment	Annual Dues Based	High

For each transaction, you can view its constituent, date, amount, payment method, revenue type, and membership program and level. By default, the report sorts the transactions by their order in the batch; however, you can click a column header to sort by that value.

You can view the report from the Enter Membership Dues page or Batch Entry page. On the Committed batches tab, select the batch to analyze and click **View control report** on the action bar. The Membership Dues Batch Control Report page appears. To return to the Batch Entry page, click **Back** in your browser.

Membership Dues Batch Exception Report

When you commit a membership dues batch to the database, some transactions may not commit to the database, such as due to incorrect or insufficient data entry. Transactions that do not commit are called "exceptions." The Membership Dues Batch Exception Report displays the number and properties, including projected totals, of the batch; lists the membership dues transactions in the batch that did not commit to the database; and calculates the total count and monetary amount of the transactions that did and did not commit.

Membership Dues Batch Exception Report

Originating batch number: 7 No. of exceptions: 1 Exceptions total: \$30.00
 Exception batch number: 8
 Owner: BBNT\MaryJaneTh

Membership amount:	\$30.00	Payments made:	1
Add-on amount:	\$0.00	Recurring gifts created:	0
Donation amount:	\$0.00	Memberships:	1
Total amount:	\$30.00		

Membership Detail

Constituent Name	Constituent Lookup Id	Date	Amount	Payment Method	Revenue Type	Reason for Exception
Franklin Andrews	8-10000443	3/19/2012	\$30.00	Check	Payment	Invalid promotion code.

For each exception, you can view its constituent, date, amount, payment method, revenue type, and an explanation of why the transaction did not commit.

You can view the report from the Enter Membership Dues page or Batch Entry page. On the Committed batches tab, select the batch to analyze and click **View exception report** on the action bar. The Membership Dues Batch Exception Report page appears. To return to the Batch Entry page, click **Back** in your browser.

Import Membership Dues

From *Administration*, you can import membership dues transactions into the database. For example, after a membership drive at a community event, you can import the memberships from a comma-separated values (*.csv) file created in Microsoft *Excel*.

Warning: To successfully import membership dues transactions, constituent records must exist for all members included in the import, including any constituents giving a gift of membership to someone else. For example, if your import includes a gift of membership, both the giver and recipient must be constituents in your database, as well as any additional members associated with the membership. To import new membership joins, gifts of memberships, or renewals that include additional members, you may need to split them into multiple imports.

➤ Import membership dues transactions

Note: Constituent records must exist for all constituents included in the import, including members, additional members, and those who give a gift of membership. For example, if your import includes a gift of membership, both the giver and recipient must be constituents in your database, as well as any additional members associated with the membership.

1. From *Administration*, add an import process based on the membership dues batch template to use with your membership dues transactions.
2. To create the membership dues transactions, map the import process to your import file and run the import process. For information about the requirements of specific fields in your import file, see [Membership Dues Import Fields on page 86](#).
3. If the import process completes with exceptions, correct the information in your import file.

Note: If exceptions occur because information in your import file does not match existing constituents, you must add the constituents to your database before you attempt to import the membership dues transactions again.

- a. From the status page of the membership dues import process, download the exception file to determine which rows in your import file contain new constituents or incorrect information.
- b. If necessary, use the information in your import file to add all new constituents to your database. For example, create a new import file of the constituent information and use an import process based on a constituent batch, or create and commit a constituent batch of the new constituent information.

Warning: If you import new constituent information, you must create a new import file based on information from your original membership dues import file. You cannot use a membership dues import file with a constituent import. For example, in your membership dues transactions import file, a row may contain multiple constituents based on additional members or a gift recipient. In the new import file, each constituent must have a separate row.

- c. After you correct the import file and add any new constituents to the database, use the exception file to attempt to import the membership dues transactions again.

Warning: If the batch contains payments by credit card or direct debit, you must process these transactions before you commit the batch. To process credit card transactions from the Enter Membership Dues page, click **Credit Card Processing** under **Tasks**. To process direct debit transactions, click **Generate direct debit file process** under **Tasks**. For information about how to process credit card or direct debit transactions, see the *Revenue Guide*.

4. Manage the import batches as necessary from the Enter Memberships Dues page or *Batch entry*.

Membership Dues Import Fields

To import membership dues, your import file must be a comma-separated values (*.csv) of the membership dues information. The table below explains the requirements of specific fields in the import file. For information about additional fields used to add membership dues, see [Add a Membership Screen on page 71](#).

Template column	Description
Membership transaction type	This field determines the type of membership transaction to add, such as a join or renewal. You can enter only one of these values. To add a new membership, enter 0. To renew an existing membership, enter 1.

Template column	Description
Discount type	<p>For a transaction that includes a Manual membership promotion, enter the name of the promotion.</p> <p>For a transaction that includes a With code membership promotion, leave this field blank. Instead, enter the promotion code in the Promotion code field.</p>
Promotion code	<p>For a transaction that includes a With code membership promotion, enter the code for the promotion.</p> <p>For a transaction that includes a Manual membership promotion, leave this field blank. Instead, enter the promotion name in the Discount type field.</p>
Membership program add-ons, Add-on type	<p>When you add add-ons to a membership, the Add-on type field indicates whether the add-on is for a benefit or an additional member. You can enter only one of two values.</p> <p>To add a benefit add-on, enter 0. To add an additional member add-on, enter 1.</p>
Members receiving cards, Member	<p>When you add additional members with membership cards to a membership, enter the system record ID for the member to receive a membership card.</p> <p>To include this value in a constituent query, include the Constituent/Constituent record field.</p>

Print Membership Cards

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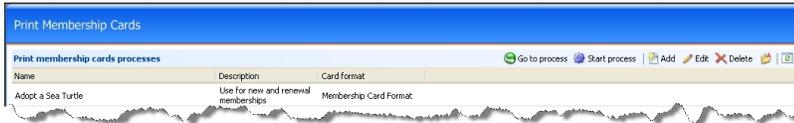
You can print an individual membership card from a constituent record. From the **Print membership cards** task, you print or download membership cards in bulk for a group of constituents.

Print Membership Card Tasks

Use **Print membership cards** to manage membership card processes in your database. To access **Print membership cards**, from *Memberships*, click **Print membership cards** under **Tasks**. The Print Membership Cards page appears.

The **Print membership cards processes** grid lists the card processes in the database and displays the **Name, Description, and Card format** of each process. You enter this information when you add the print membership card process to the database.

After you run the Print membership card process, you can go to the Print membership card process page and click **Clear results** to run the process for the cards again.



Depending on your security rights and system role, you perform functions to manage processes in the database.

Add Print Membership Card Process

You establish a process to print or download different types of membership cards for various groups of members. For example, you can create a process to print cards monthly for new members and renewal members in the Adopt a Sea Turtle program. You can create another process to print membership cards annually for members in the Gold level. You save the settings for each process, and when you want to distribute cards to the next group of members, you select the existing print membership card process to generate the cards.

Note: This process is typically completed by the system administrator at your organization.

➤ Add a print membership card process

1. On the Print Membership Cards page, click **Add**. The Add a print membership cards process screen appears.

Add a print membership cards process

Name:

Description:

Criteria

Membership program:

Limit to

Print:

All "Issued" cards

All "Issued" cards for selected membership level

Level:

All "Issued" cards for selected constituents

Selection:

Results

These options may be modified at run time.

Card format to use:

Create constituent selection from results

Selection name:

Overwrite existing selection

2. On this screen, you can enter name and description information. You can also select criteria details and results information.

For information about items on this screen, see [Add a Print Membership Cards Process Screen on page 90](#).

3. To close the screen and save the information you entered, click **Save**. The process status page appears. For information about this page, see [Go To Process Status Page for Print Membership Cards on page 93](#).

You are now ready to run the print membership cards process to prepare membership cards to be printed or downloaded as a .csv file. For information about how to run the print membership cards process, see [Run Print Membership Cards Process on page 92](#).

Add a Print Membership Cards Process Screen

The following table explains the items on this screen.

Screen Item	Description
Name	This required field has a limit of 100 characters. Enter a name for the process that is easily recognizable when you use the process again.
Description	This field has a limit of 255 characters. Enter description information that further identifies the process. For example, you can enter "Use for new and renewal memberships."
Membership program	This is a required field. Select an existing membership program for the process.
Limit to	Select the checkbox, and then use the down arrow that becomes active to limit the print membership card process to create cards for new members, renewed members, or rejoined members. If you do not select this checkbox, cards will be created for all members.
Print: All 'Issued' cards	To generate all cards with a status of "Issued," select this option. The print status for a membership card is stored in the Membership cards grid on the Summary tab on the constituent membership details page. If you select this option, all cards with "Issued" in the Status column in the grid are included in the process.
Print: All 'Issued' cards for selected membership level	To generate cards with a status of "Issued" in a specific membership level, select this option. After you select this, the Level field enables. The levels that appear in the field default for the membership program selected for the process.
Print: All 'Issued' cards for selected constituents	To generate cards for a specific group of records, select this option. The Selection field enables. To add or search for an existing Constituent query to use for the cards, click the magnifying glass. If the selection you need does not appear in search results, confirm that the Record type is Constituent.
Card format to use	The card format selected for the membership program defaults in the field. You can select another card format to use for the process. If you need to edit the format for a membership card, you must access the membership card template in the letter template library in <i>Marketing and Communications</i> .
Create constituent selection from results	To create a constituent selection for a group of members in the process, select this checkbox. The remaining field and checkbox are enabled.
Selection name	When you select Create constituent selection from results , you must enter a name for the selection that the process generates.
Overwrite existing selection	To overwrite the selection in the previous field each time you run the process, select this checkbox.

Run Print Membership Cards Process

After you add or edit the print membership cards process, you run the process to print or download the cards as a .csv file. A card generates for each member who has been issued a card. For example, if Mark Adamson and his spouse have each been issued a card for the Adopt a Sea Turtle program, a card generates for each constituent.

➤ Run print membership cards process

1. From the Print Membership Cards page, select a process and click **Start process**. The Run print membership cards process screen appears.

For information about items on this screen, see [Run Print Membership Cards Process Screen on page 92](#).

2. To run the print membership cards process, click **Start**. The process begins, and you are sent to the Recent Status tab on the Print Membership Cards page. For information about the Recent Status tab, see [Recent Status Tab on page 93](#).

After the process completes, you can print membership cards or download them as a .csv file to be sent to a third party to print. For information about how to print or download membership cards, see [Print Membership Cards on page 96](#) and [Download Membership Cards on page 96](#).

Run Print Membership Cards Process Screen

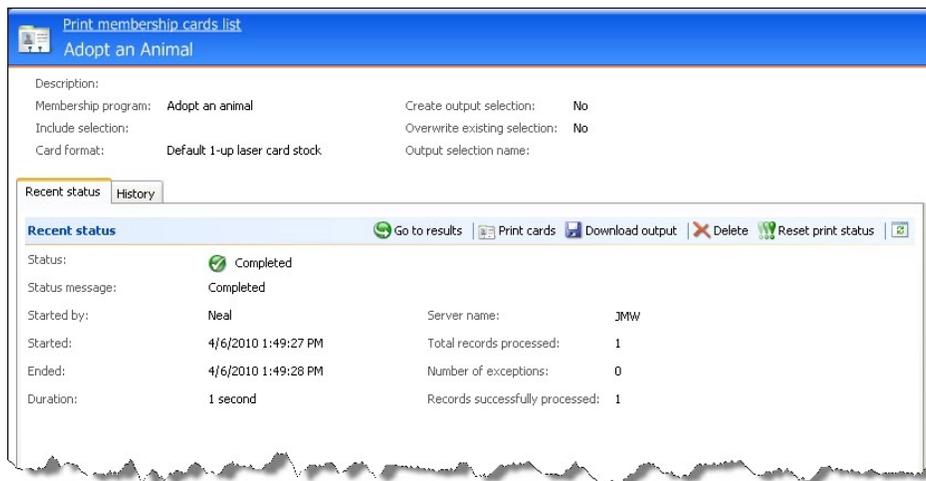
The table below explains the items on this screen.

Screen Item	Description
Process name and For membership program	This information defaults from the Name and Program name fields on the Add (or Edit) print membership cards process screen. The fields are disabled. To change the process name, access the Edit print membership cards process screen.

Screen Item	Description
Create constituent selection from results	To create a Constituent selection for a group of members in the process, select this checkbox. The remaining field and checkbox are enabled.
Selection name	When you select Create constituent selection from results , you must enter a name for the selection that the process generates.
Overwrite existing selection	To overwrite the selection in the previous field each time you run the process, select this checkbox.

Go To Process Status Page for Print Membership Cards

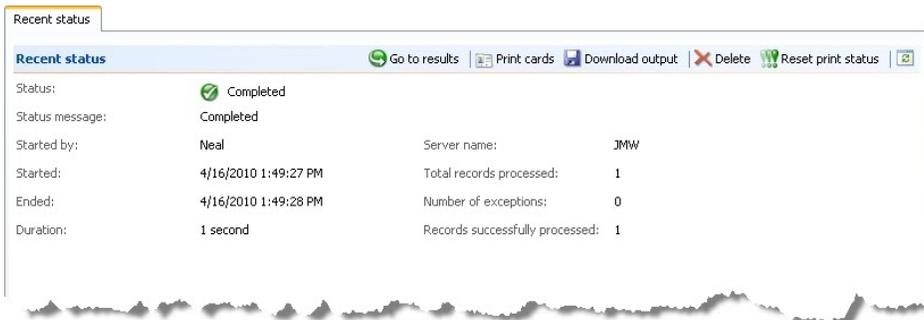
After you save a print membership cards process, the process status page appears.



From the Print Membership Cards page, you can click the process name to access this page, which contains the Recent status and History tabs. The top half of the page contains the parameters and properties for the process. To make a change to this information, edit the print membership cards process.

Recent Status Tab

On the Recent Status tab, you view the details of the most recent instance of the print membership cards process. These details include the status of the run; the start time, end time, and duration of the run; the person who last started the process; the name of the server used to process the run; the total number of cards processed; and how many cards processed successfully and how many were exceptions.

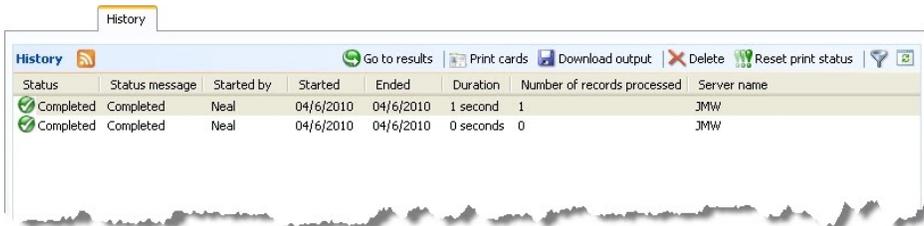


Depending on your security rights and system role, you perform functions to manage the most recent process.

- **Go to results:** To view a list of constituents included in the process, click **Go to results**. A **Printed cards** grid appears. Additional information in the grid includes data, such as the card status, card number, name on card, and expires on date. You can also assign a different membership card number if necessary, clear the results of the process, and delete the status record entirely.
- **Print cards:** To print the membership cards that were processed, click **Print cards**. The Print membership cards screen appears and allows you to select a different card format if necessary. For information, see [Print Membership Cards on page 96](#).
- **Download output:** If you would rather download a .csv file of the membership cards that were processed to be sent to a printing service, click **Download output**. The Save As screen appears for you select a location to save the membership cards. For more information, see [Download Membership Cards on page 96](#).
- **Delete:** To delete the most recent instance of the process, click **Delete**.
- **Clear results:** To run a print membership cards process again, click **Clear results**. This allows you to run the process for the cards again.

History Tab

On the History tab, you view the history for each run of the print membership cards process. The details in the **History** grid include the status of the process; the start time, end time, and duration of the process; the person who last started the process; and the name of the server most recently used to process the cards. This information generates each time you run a print membership cards process. Therefore, it is likely you have multiple rows of information in this grid.



Depending on your security rights and system role, you perform functions to manage the processes.

- **View RSS feed:** To subscribe to a Really Simple Syndication (RSS) feed, click **View RSS feed**. Use this to receive a notification when a process completes.

- **Print cards:** To print the membership cards that were processed, click **Print cards**. The Print membership cards screen appears and allows you to select a different card format if necessary. For information, see [Print Membership Cards on page 96](#).
- **Download output:** If you would rather download a .csv file of the membership cards that were processed to be sent to a printing service, click **Download output**. The Save As screen appears for you select a location to save the membership cards. For more information, see [Download Membership Cards on page 96](#).
- **Delete:** To delete a single instance of the process, select the process. Click **Delete**.
- **Reset print status:** To reset the status of the print membership card process, click **Clear results**. The status of the process changes from “Printed” to “Issued.” If you already downloaded or printed membership cards, you must reset the print status to perform the action again.
- **Filter:** As the history list grows, it may be difficult to find a particular print membership cards process. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.
- **Refresh:** To make sure you have the latest process information, click **Refresh**.

View Print Membership Card Process Results

After you run a print membership cards process, the process status page appears. To view specific results of the print process, including a list of the membership cards prepared during the selected process, click **Go to results**. The process results page appears.

Member	Status	Card number	Name on card	Date issued	Expires on	Comments	Issued by
ABC Learning Center-Downtown Branch	Issued	ABC Learning Center-Downtown Branch	ABC Learning Center-Downtown Branch	06/7/2010	06/3/2011		SED
Alex E. Andrews	Issued	Alex E. Andrews	Alex E. Andrews	06/7/2010	06/3/2011		kristin
Andrea Allenbaugh	Issued	Andrea Allenbaugh	Andrea Allenbaugh	06/6/2010	06/3/2011		Sarah
Ashley Garrett	Issued	Ashley Garrett	Ashley Garrett	06/6/2010	06/3/2011		Sarah
Clarice E. Riddle	Issued	Clarice E. Riddle	Clarice E. Riddle	06/5/2010	06/3/2011		Neal
Elohim Synagogue	Issued	Elohim Synagogue	Elohim Synagogue	06/6/2010	05/3/2011		Sarah
Eric A. Adamson	Issued	Eric A. Adamson	Eric A. Adamson	06/4/2010	06/3/2011		Sarah
Eric Aertker	Issued	Eric Aertker	Eric Aertker	06/2/2010	06/3/2011		Josh
Harry Bentley	Issued	Harry Bentley	Harry Bentley	06/7/2010	06/3/2011		Sarah
Howard Gaskins	Issued	Howard Gaskins	Howard Gaskins	06/2/2010	06/3/2011		Josh
Ira Bentley	Issued	Ira Bentley	Ira Bentley	06/6/2010	06/3/2011		Sarah
Jason D. Campbell	Issued	Jason D. Campbell	Jason D. Campbell	06/2/2010	06/3/2011		Sarah
Kenneth Ashton	Issued	Kenneth Ashton	Kenneth Ashton	06/1/2010	06/3/2011		Sarah

The **Printed cards** grid displays information about each card prepared during the process and provides specifics like the card status, card number, name on the card, and expiration date.

Depending on your security rights and system role, you can perform functions to manage the instance of the process you are viewing. For example, you can assign a different number to a card printed during this process or clear the process results.

- **Assign card number:** To associate a different card number with the selected membership card, click **Assign card number**. On the screen that appears, in the **Card number** field, enter the number for the card. **Click Save**.

- Reset print status: Click **Clear results**. This allows you to run the process for the cards again.
- **Delete**: To delete the instance of the process, click **Delete**.

Clear Print Status of Printed Membership Cards

After you run a print membership cards process, the process status page appears. To view specific results of the print process, including a list of the membership cards prepared during the selected process, click the name of the process. The process results page appears.

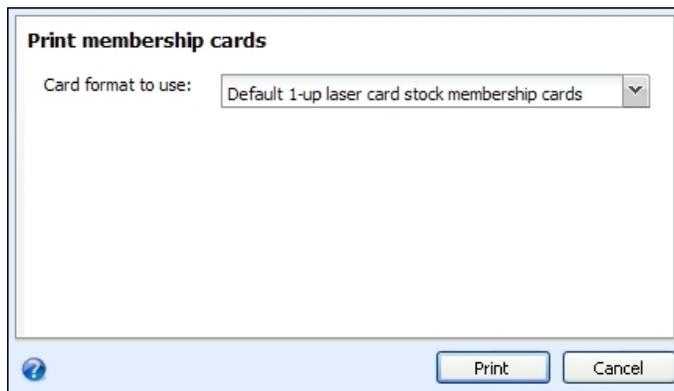
To reset the print status, on the Recent Status tab, click **Clear results**. This allows you to run the Print membership cards process for the same cards again.

Print Membership Cards

After you have successfully run a print membership cards process, you can print the membership cards.

> Print membership cards

1. From the print membership cards process status page, click **Print cards**. The Print membership cards screen appears.



2. Select a different card format if necessary.
3. Click **Save**. A download screen appears.
4. Select a location to download the file and click **Save**.
5. Open the file you just downloaded and print from your compatible document editor.

Download Membership Cards

Rather than print membership cards, you can download them as a .csv file after the print membership cards process successfully completes. You can then send the .csv file to a printing service to print membership cards.

➤ Download membership cards

1. From the print membership cards process status page, click **Download output**. In the File Download screen, choose to save the file. The Save As screen appears.
2. Browse to the location on the workstation or network to save the membership cards .csv file.
3. In the **File name** field, enter the name of the membership cards .csv file to create.
4. Click **Save**. The program generates the membership cards in a .csv file at the specified location. You can then send the file to a third party to print membership cards.

A message appears that confirms the location where the .csv file was saved, and asks whether to display the file.

- To view the membership cards .csv file, click **Yes**. The membership cards file appears.
- To not view the membership cards .csv file, click **No**. You return to the print membership cards process status page.

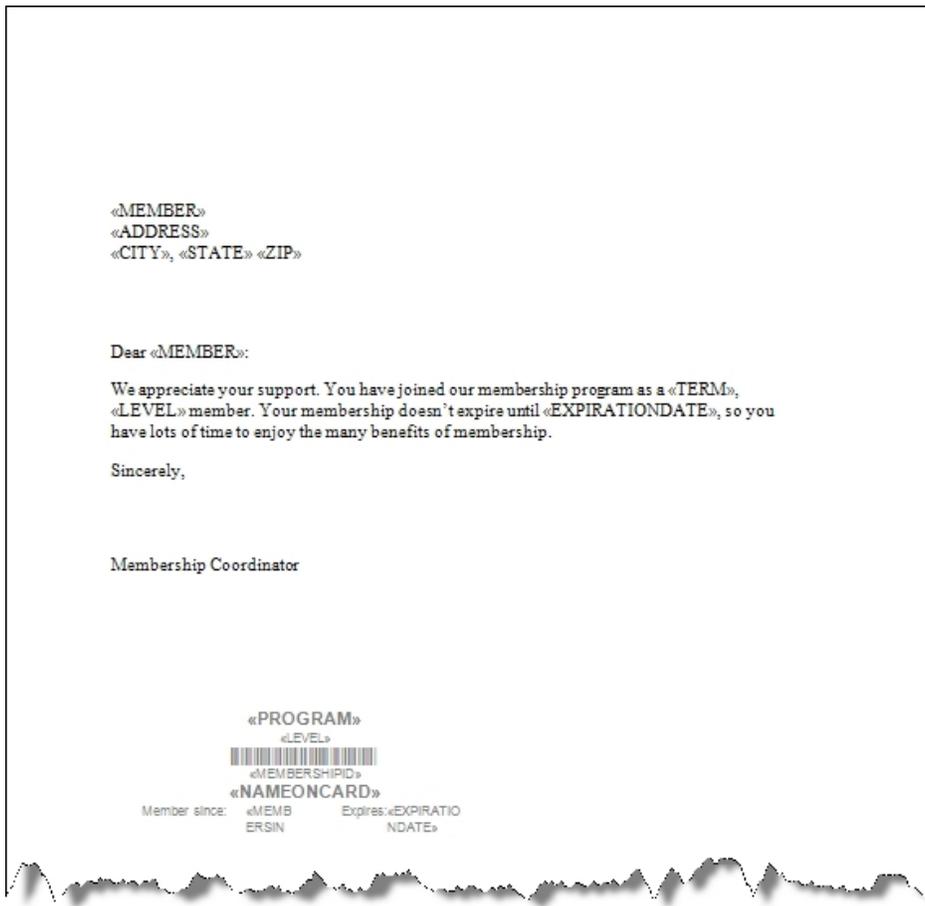
Membership Card Formats

Provided in the system are preconfigured membership card formats you can use when you print membership cards. Each card format is a mail merge document created in Microsoft *Word*. The card formats use data fields that pull specific member and membership information from your database to create the membership cards and content. For more information about the fields that can be added to a card format, see [Membership Card Format Data Fields on page 103](#).

To edit the membership card format, from *Marketing and Communications*, under **Configuration**, click **Letter template library**. On the page that appears, you can edit the necessary templates. You cannot edit preconfigured membership card formats.

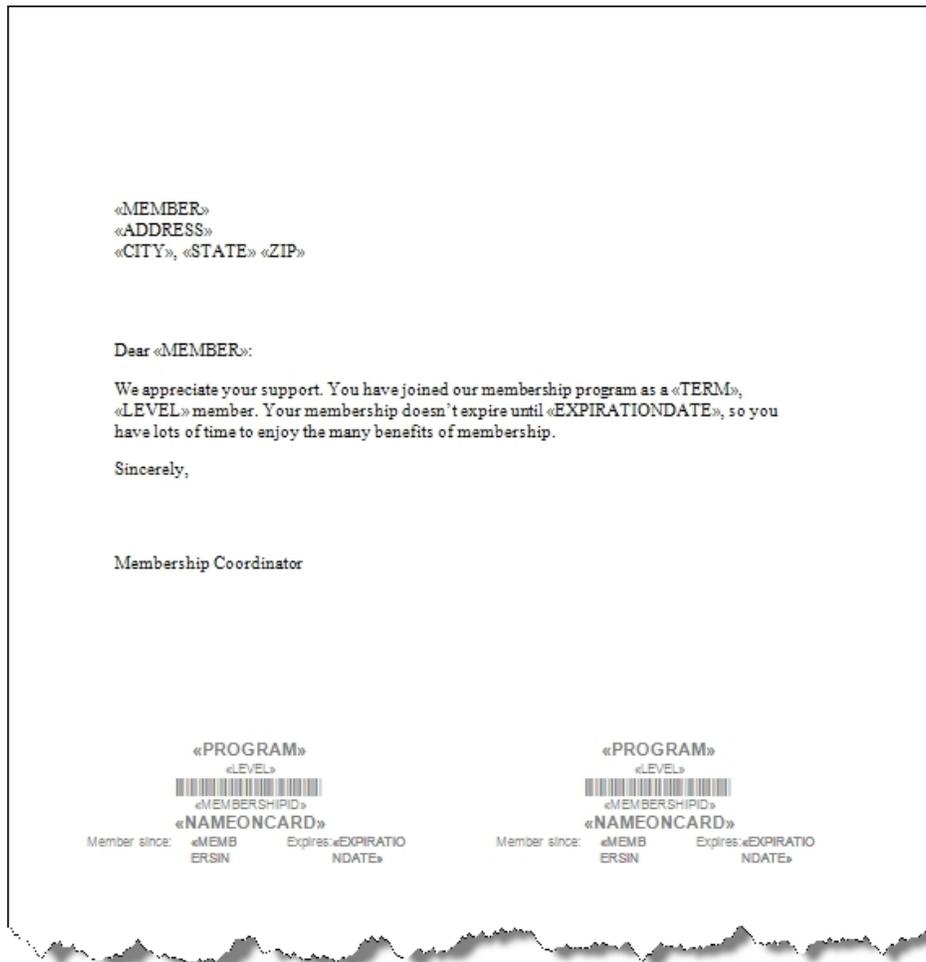
Full Sheet, Letter With One Card Format

The “Full Sheet, Letter With One Card” is a standard membership card format that includes a brief letter to the recipient of the card, details about the membership program and level, as well as one copy of the membership card.



Full Sheet, Letter With Two Cards Format

The “Full Sheet, Letter With Two Cards” is a standard membership card format that includes a brief letter to the recipient of the card, details about the membership program and level, as well as two copies of the membership card.



New Membership Card Formats

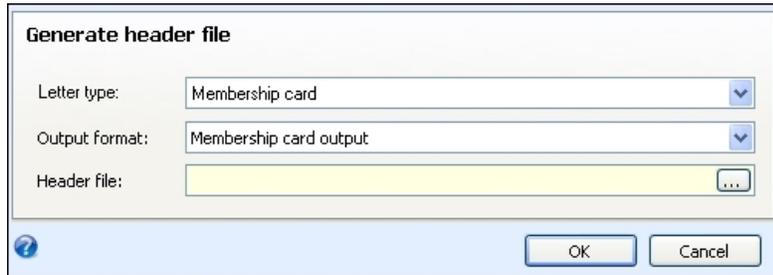
By default, the system includes a selection of preconfigured membership card formats you can use when creating card formats for membership cards. We recommend you use the pre-configured membership card formats as a starting point. For more information, see [Membership Card Formats on page 97](#). If needed, you can create your own membership card formats instead of using the preconfigured card formats.

The overall process of creating new membership card formats involves three main tasks: generate a membership card format header file, create a membership card format document in *Word*, and add the membership card format to the Letter Template Library.

Note: You must have Microsoft *Word* installed to create your own membership card formats. Previous experience creating mail merge documents in *Word* will be helpful when creating new membership card formats.

➤ Generate a membership card format header file

1. From the *Marketing and Communications*, under **Configuration**, click **Letter template library**. The Letter Template Library page appears.
2. Under **Tasks**, click **Generate header file**. The Generate header file screen appears.



3. In the **Letter type** field, select "Membership card."
4. In the **Output format** field, select "Membership card output."
5. In the **Header file** field, click the ellipsis. The Save As screen appears. Browse to the location to save the new *.csv header file and name the file.

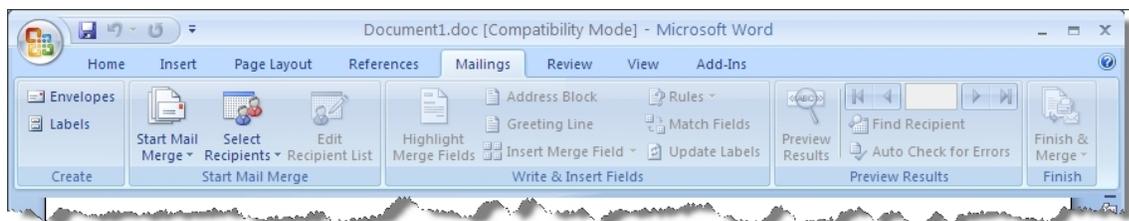
Note: Make sure you save this file in an accessible location. It will be used as the data source when you create the membership card format document in *Word*.

6. Click **Ok**. A message appears to determine if you want to open or save the *.csv file. Click Save. Now that you have a membership card format header file to use as your data source, you are ready to create a membership card format.

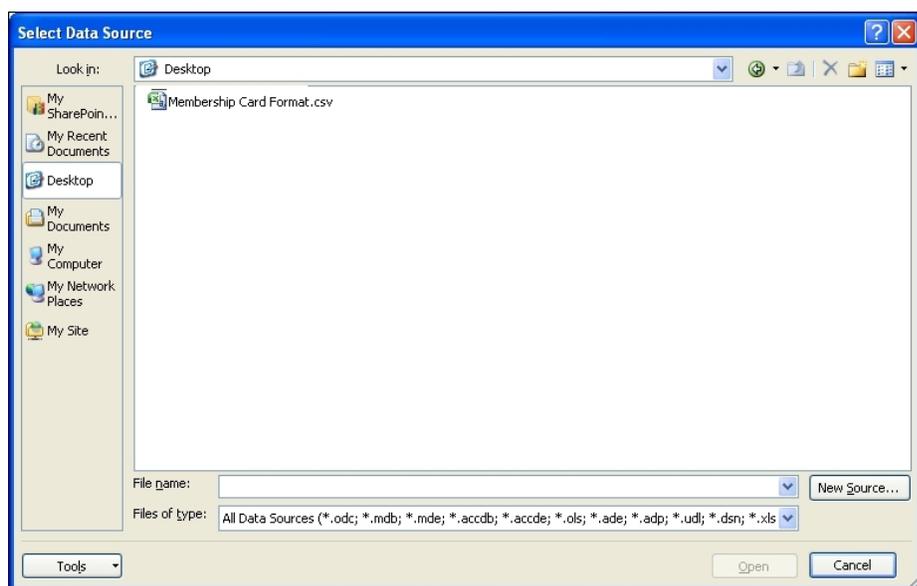
➤ Create a membership card format

You must have Microsoft *Word* installed to create your own membership card templates. This procedure guides you through the steps required to create a contact document using *Word 2007*.

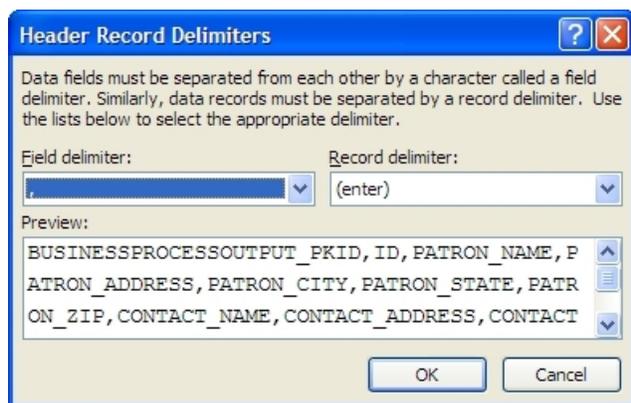
1. From *Word*, create a new blank document and write the body of the membership card format. The body of the letter should provide context for the data fields you will add to the letter during this process. For examples of how to format the letter, you can review the preconfigured templates included in the system. For more information, see [Membership Card Formats on page 97](#).
2. On the ribbon, select the Mailings tab.



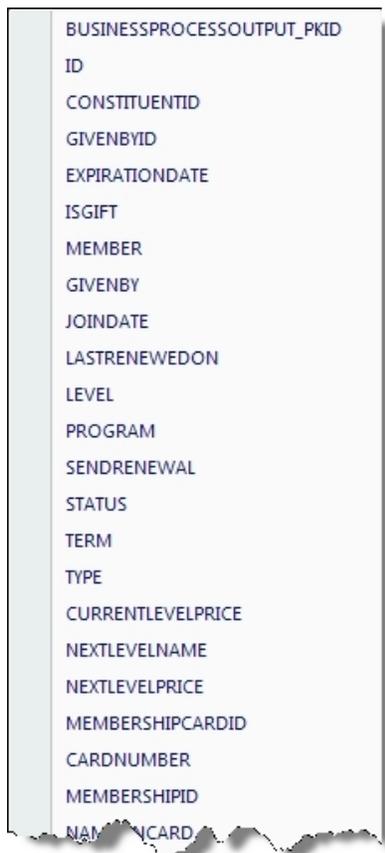
3. In the **Start Mail Merge** group, click **Select Recipients, Use Existing List**. The Select Data Source screen appears.



4. Browse to membership card format header file (*.csv) you previously created, select it and click **Open**. The Header Record Delimiters screen appears.



5. Leave the default settings as they appear on the Header Record Delimiters screen and click **OK**. You return to the *Word* document.
6. In the **Write & Insert Fields** group, click **Insert Merge Field**. A list of the membership card data fields you can add to the membership card format appears.



Note: Prior to inserting a field, you can place your cursor in the document in the location where the field should go within the body of the membership card format letter. You can also move the fields around as needed within the document after they are inserted.

7. Select the appropriate data field to add and click **Insert**. The field is added to the *Word* document. Repeat this step for each field you want to include in the membership card format.

Note: The data fields you place in the membership card format will be used to pull specific data from your database when a membership card is created for a constituent. For a list of the fields you can insert and their definitions, see [Membership Card Format Data Fields on page 103](#).

8. To return to the document, click **Close**. When you are done inserting data fields and writing the body of the membership card format, save and close the document. Now that you have created the membership card format, you are ready to add it to the Letter Template Library.

Note: Make sure you save the document in a format that is compatible with the version of *Word* installed on each workstation. For maximum compatibility, we recommend you save each template as a "Word 97-2003 Document (*.doc)" file. Also make sure you save the file in an accessible location.

➤ Add the membership card format to the Letter Template Library

1. From *Marketing and Communications*, under **Configuration**, click **Letter template library**. The Letter Template Library page appears.



2. On the action bar, click **Add**. The Add letter template screen appears.

3. Enter a name and description for the membership card format.
4. In the **Letter type** field, select "Membership card."
5. In the **Output format** field, select "Membership card output."
6. Next to **Letter**, click **Choose file**. The Open screen appears. Browse to the membership card format you previously created, select the file, and click **Open**. You return to the Add letter template screen and a link to the document is displayed.

Note: To view and edit the document, click the document link. If you have a compatible version of Microsoft *Word* installed, the membership card format opens and you can view and edit it as needed.

7. Click **Save**. You return to the Letter Template Library page and the document is listed in the **Membership card** section. The membership card format is now saved in your database and can be selected when creating personalized card formats for constituents.

Membership Card Format Data Fields

When you specify data fields in a membership card format, you can include information like the member's name and address, and membership program and level. You can also include the merge fields necessary to create the membership card.

Note: To include the barcode on the membership card, you must use the <<CARDNUMBER>> field, and use the "3 of 9" font to display the field as a barcode. The whole merge field must be set to the "3 of 9" font.

The following table includes a list of the data fields you can include in your membership card format. For examples that illustrate how these fields are typically used in a membership card letter, see [Membership Card Formats on page 97](#).

Field name	Description
BUSINESSPROCESSOUTPUT...PKID	This field is related to a system business process and should not be added to the membership card format.
ISGIFT	Gift of membership
MEMBER	Member's name
GIVENBY	If this membership was a gift of membership, this field displays which constituent gave the gift of membership.
JOINDATE	Membership join date
LASTRENEWEDON	Date the membership was last renewed
LEVEL	Membership level
PROGRAM	Membership program
STATUS	Current membership status
TERM	Membership term
TYPE	Membership type
CURRENTLEVELPRICE	Price of the current membership level
NEXTLEVELNAME	Name of the next highest membership level
NEXTLEVELPRICE	Price of the next highest membership level
MEMBERSHIPCARDID	Membership card ID
CARDNUMBER	Membership card number. This field is used to display the barcode on the membership card. The font for this field must be set to "3 of 9".
MEMBERSHIPID	Membership ID
NAMEONCARD	Name that appears on the membership card
MEMBERSINCE	Date the constituent first became a member
ADDRESS	Member address
CITY	Member city

Field name	Description
STATE	Member state
Zip code	Member Zip code
PRIMARYADDRESSEE	Primary addressee
PRIMARYSALUTATION	Primary salutation
LASTORGGROUPNAME	Last name or group name
CARDNUMBERDISPLAY	Membership card number
REVENUEAMOUNT	Amount of revenue from membership purchase
REVENUERECEIPTAMOUNT	Revenue receipt amount
REVENUEREERENCE	Revenue reference
REVENUEDATE	Date revenue was taken in

Membership Reports

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With the optional module *Membership Management*, you can generate and use reports to track the effectiveness of your membership efforts.

Membership reports help you evaluate membership activity for your organization. You can print or export reports in several different formats, such as .xls or .pdf.

Active Membership Report

This report provides a graphical view of the active membership count at your organization. It also provides a view of active memberships by level. The membership level data includes the specific number of memberships per level and the overall percentage of active memberships for each level.

To run the report, from a membership program, click **Active membership** under **Reports**. The Active Membership Report page appears.

You make a selection in the **Breakdown data** field to determine if the membership count is displayed in the graph as daily, weekly, monthly, or yearly data points. After you select the data and breakdown options, click **View Report**.

Tip: By default, the **Breakdown data** field is set to “Monthly.”

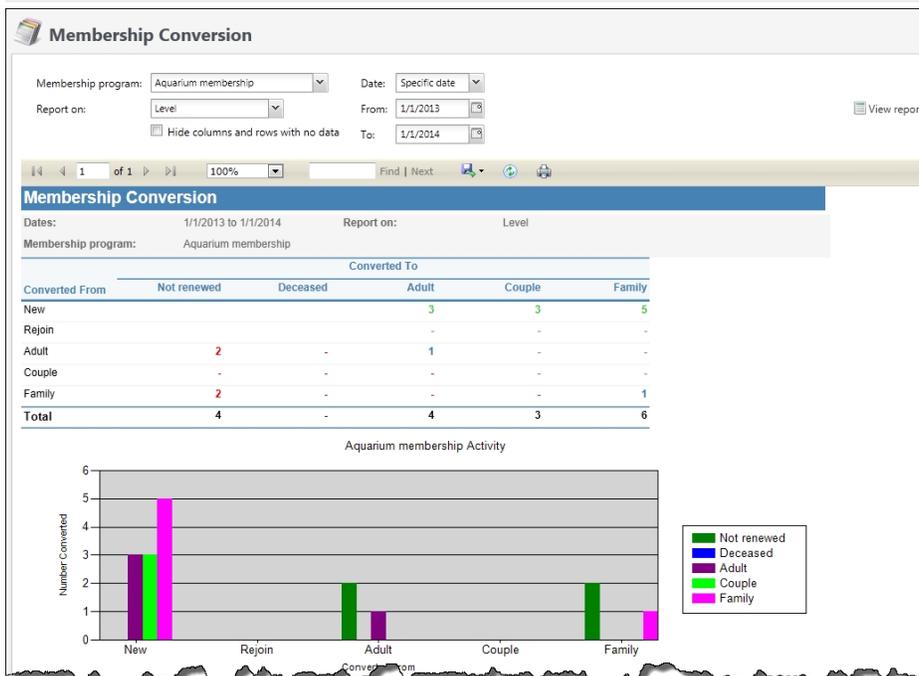
Membership Conversion Report

Run the Membership Conversion Report to determine how effectively your organization converts low level memberships to high level memberships. This report counts the number of memberships that upgrade or downgrade from one level to another, the number of memberships that remain the same, and the number of memberships that were not renewed. It also counts new members and members who rejoin, as well as the number of members who did not rejoin because they became deceased. You can also select whether to report on membership conversion between levels or tiers. If you do not want to display membership levels or tiers with no data, you can select to hide those columns and rows.

Note: A membership does not upgrade or downgrade due to a change in membership term. Therefore, memberships with only a term change are not included in the report.

To run the report, from a membership program, click **Membership conversion** under **Reports**.

Note: Report results include memberships that expire or cancel during the selected date range.

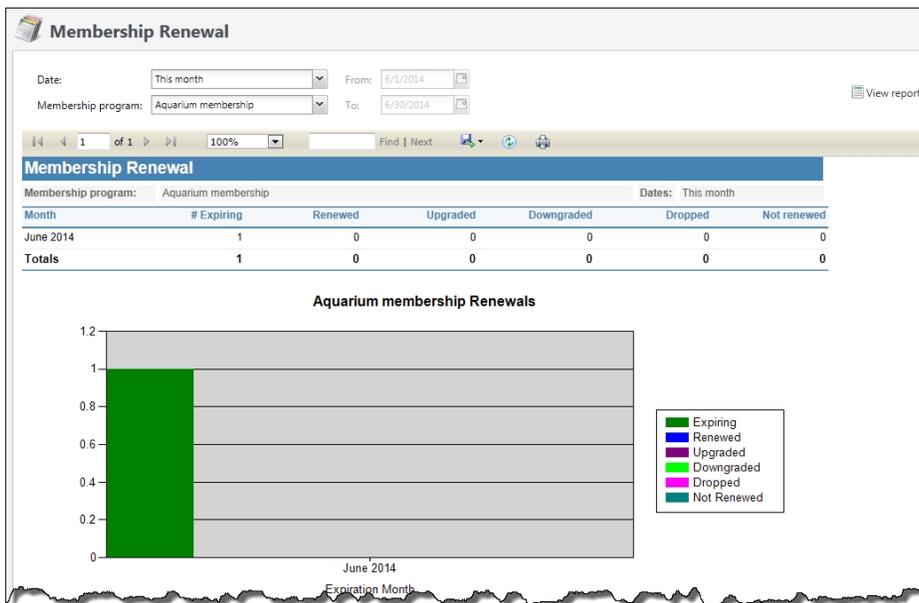


Membership Renewal Report

Run the Membership Renewal Report to display renewal details for a membership program. For a time frame that you specify, the report lists the number of memberships to expire. It also calculates the number of renewed, upgraded, downgraded, dropped, or lapsed memberships for the program.

Note: The Renewed category also includes any rejoins for the program and dates specified.

To run the report, from a membership program, click **Membership renewal** under **Reports**.

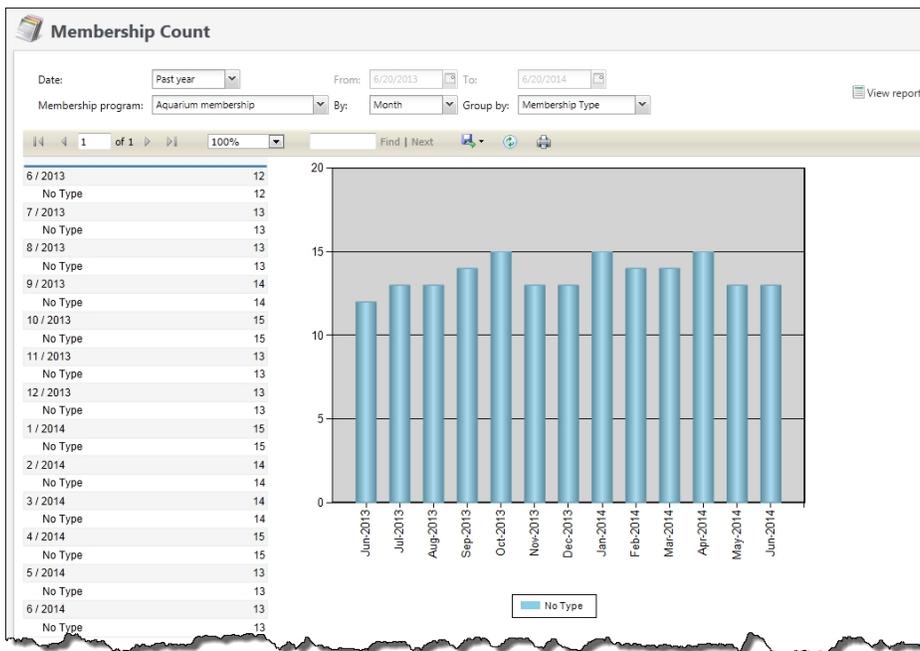


Membership Count Report

You can use this report to view the number of active memberships for a specific month, quarter, or year grouped by membership type or level. With the date filters provided, you identify the period of time that contains the months, quarters, or years to run the report for. The report also provides several quick date options you can use to view the membership count for the past three months, past six months, or past year.

Note: This report provides the number of active memberships, not members. For example, if a family membership exists with four members, that counts as one membership in this report. Additionally, the report provides the number of active memberships that exist at the end of the selected month, quarter, or year.

To run the report, from a membership program, click **Membership count** under **Reports**.



Benefits List Report

Run the Benefits List Report to create a list of constituents who have benefits from memberships, revenue, recognition programs, or events. The report lists the benefit item, along with the quantity and cost amount of the benefit.

Warning: If you edit the value of a benefit in the benefits catalog, the new value does not appear on instances of the benefit already associated with an appeal, event, membership, or revenue transaction and will not be reflected in the report. To associate the new benefit value with pre-existing transactions, events, memberships, or appeals, you must update those records. For more information about the benefits catalog, refer to the *Fundraising Guide*.

To run the report, from a membership program, click **Benefits list** under **Reports**.

Membership Dues Revenue Report

The Membership Dues Revenue Report displays revenue transaction details for a membership program in a time frame that you specify. The **Memberships** column displays the number of active memberships for the specified level, and the **Additional Gifts** column displays the amount of revenue from all gifts given by any member of the specified level.

Membership Dues Revenue

Membership program: Date:

Group by: From: To:

1 of 1 100% Find | Next

Membership Dues Revenue

Membership program: Group by:

Dates:

Reporting group	Membership level	Activity	Revenue	Add-on revenue	Memberships	Additional gifts
(no reporting group)						
	Penguin		\$200.00	\$0.00		\$4,700.00
		Renew	\$200.00	\$0.00		
	Manatee		\$0.00	\$0.00		\$500.00

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To run the report, from a membership program, click **Membership dues revenue** under **Reports**. The report appears.

Membership Projected Revenue Report

The Membership Projected Revenue Report displays projected revenue for a membership program. The projections are based on expected revenue from membership renewals that include upgrades, downgrades, and rejoins.

The report contains a total row that calculates the sum of the projected revenue for levels in each program. It also contains a total row that calculates the sum of the projected revenue for all levels and programs in a year. The report calculations are broken out by each month in the calendar year.

To run the report, from a membership program, click **Membership projected revenue** under **Reports**.

Membership Projected Revenue

Membership program: Group by:

Use data from:

1 of 1 100% Find | Next

Membership Projected Revenue

Membership program: Group by:

Use data from:

Membership program/Level	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
2013								
Aquarium membership								
Adult	\$0.00	\$0.00	\$100.00	\$300.00	\$50.00	\$50.00	\$50.00	\$50.00
Family	\$0.00	\$0.00	\$0.00	\$600.00	\$150.00	\$0.00	\$0.00	\$0.00
Couple	\$0.00	\$0.00	\$0.00	\$90.00	\$0.00	\$0.00	\$0.00	\$40.00
Aquarium membership Total	\$0.00	\$0.00	\$100.00	\$990.00	\$200.00	\$50.00	\$50.00	\$90.00
2013 Total	\$0.00	\$0.00	\$100.00	\$990.00	\$200.00	\$50.00	\$50.00	\$90.00
2014								
Aquarium membership								
Adult	\$0.00	\$0.00	\$299.97	\$900.05	\$149.99	\$149.99	\$149.99	\$149.99
Family	\$0.00	\$0.00	\$0.00	\$1,799.82	\$449.96	\$0.00	\$0.00	\$0.00

Membership Dues Statistics Comparison Report

The Membership Dues Statistics Comparison Report compares membership data for different time periods. You select the time periods to compare and the membership program to use for the report. The report compares membership dues amount and count information for the tiers and levels in the program. You can group the report by channel or by activity. Channel displays how revenue was received such as by mail or phone. Activity displays the type of transaction, such as a join or a renew.

Note: You select the channel in the **Inbound channel** field on the Add a payment screen. This field is a code table so your organization can enter the options for the field.

For reports grouped by activity, only the most recent membership transaction within the selected periods is counted in the **Totals** row. For example, if a member joins and renews within a selected period only, a single membership is counted in the total. However, a join and a renew is added to each activity sub-total for the period.

Membership Dues Statistical Comparison

This period: All dates From: To:
 Last period: All dates From: To:
 Membership program: Adopt an animal Group by: Activity

1 of 1 100% Find | Next

Membership program: Adopt an animal		Group by: Activity		All dates		All dates		Retention rate
Reporting group	Membership level	Activity	Amount	Count	Amount	Count		
(no reporting group)								
[-] Penguin			\$100.00	0	\$100.00	0		0.00 %
		Downgrade	\$0.00	1	\$0.00	1		
		Drop	(\$100.00)	4	(\$100.00)	4		
		Join	\$0.00	15	\$0.00	15		
		Rejoin	\$0.00	2	\$0.00	2		
		Renew	\$200.00	4	\$200.00	4		
[-] Manatee			\$0.00	0	\$0.00	0		0.00 %
		Drop	\$0.00	1	\$0.00	1		
		Join	\$0.00	2	\$0.00	2		
		Upgrade	\$0.00	1	\$0.00	1		
Total:			\$100.00	0	\$100.00	0		0.00 %

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Note: The retention rate is the percentage of existing memberships that opted to renew a membership during the renewal opportunity. Lifetime memberships and memberships that are not due for renewal are excluded from the calculation.

Reports grouped by channel behave similarly to reports grouped by activity. Only the most recent membership transaction within a selected period is counted in the total. However, cancellations are not included in any channel revenue sub-totals, since revenue is not generated by canceled memberships.

To run the report, from a membership program, click **Membership dues statistics comparison** under **Reports**.

Note: You can export the report using the floppy disk icon into multiple formats, including XML, PDF, Excel, and Word.