The Raiser's Edge™

Membership Data Entry Guide

Contents

What Is In This Guide?

In the *Membership Data Entry Guide*, you learn to add, edit, and delete membership records (when you have the optional module, *Membership Management*). You can also learn about the following.

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How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser's Edge* by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

Membership

Note: Optional modules such as *Event Management*, *Membership Management*, and *Alumni Tracking* enable you to customize **The Raiser's Edge** to meet the specific needs of your organization. When you purchase an optional module from Blackbaud, you are given a code. You must enter this code to "unlock" or activate the optional module. For more information, see the Program Basics chapter of the *Program Basics Guide*.

The optional module *Membership Management* enhances **The Raiser's Edge** by helping you track memberships for your organization. With *Membership Management,* you can track multiple memberships and programs, produce reports to analyze membership activity, print lists and directories of members, link gift records to membership records, and perform specific mailing tasks, such as preparing membership cards and renewal notices. In addition, you can perform membership transactions, including locating lapsed members, dropping members who have not responded to renewal notices, upgrading or downgrading memberships, and renewing memberships for members who want to remain active.

The membership record is very versatile. You can store and view membership information, including the number of years a member has maintained a membership, how many times the membership has been renewed, and the last renewal date. You can also create membership summaries using membership categories, programs, and subcategories as filters.

On the membership record, you can designate the number of membership cards each constituent should receive, the type of membership held, the solicitors involved in procuring the membership, and the type of membership benefits the member receives.

On the Membership tab of a constituent record, you can view, in summary form, all membership information for a constituent. Most of the information displayed on the Membership tab of a constituent record is only for viewing purposes, because most of the data entry occurs on the membership record. If you prefer, you can customize the tab of the constituent record or membership record by assigning special fonts and colors to the membership legend for primary, active, and lapsed/dropped memberships. This feature can help you quickly find membership information for a constituent with many memberships on his record.

You can also use the optional module *Membership Management* with other areas of **The Raiser's Edge**, like *Gifts*. When a constituent pays dues for a membership, you may want to link the membership record to the gift record. When you link a membership to a gift, you can enter the monetary value of the membership benefits on the gift record. This ensures accurate receipting. You can also apply pledge payments to membership dues.

Frequently Used Terms

To use the optional module *Membership Management* correctly, you must have a basic understanding of the different terms used to describe parts of the membership transaction process. If you come across an unfamiliar term when reading this or any other book in **The Raiser's Edge** documentation, make sure you check the online glossary in the help file.

Gift of membership. A gift of membership describes a situation in which a constituent is the primary beneficiary of membership benefits, but is not responsible for the membership dues. For example, a parent can give a gift of membership to a child. The parent pays the membership dues and the child benefits from the membership. The donor, or person paying the membership dues, and the member receiving the benefits must have a constituent record in your database.

Lifetime membership. You can establish and track lifetime memberships for your constituents. Once you set up a lifetime membership, you can always track membership information, even after the constituent is deceased. Lifetime memberships do not expire, nor do they receive membership renewals.

Membership benefit. A membership benefit is a bonus your organization gives to constituents, depending on their level of membership or the dues they pay. For example, you can determine the membership benefits associated with each membership category in advance, or you can enter this information from the membership record.

Membership category. Membership category defines the level of giving required for a constituent to gain membership into one of your membership groups or clubs. Membership categories can be linked to a specific membership program. For example, a zoo may have the categories of Junior Curator and Young Explorer under the Kid's Club membership program. While dues for a Young Explorer are $15, a member of the Junior Curator category, the next level of membership in the Kid's Club program, pays $25 in dues.

Membership program. A membership program is the overall umbrella description for a group of membership categories. For example, a museum may have an Arts Program with membership categories of Individual, Student, Family, Sustainer, and Patron.

Membership record. The membership record is the record in which constituent membership information is stored and maintained. The membership record is composed of three tabs: the Membership tab, the Membership History tab, and the Attributes/Notes tab.

Membership standing. A membership standing is used to describe the status of a specific membership. The membership standing appears in the top right-hand corner of a membership record and changes when the membership expires or a membership transaction is entered and saved. The membership standings are New, Active, Lapsed, and Dropped. In User Options, you can also change the color or style of print for the membership standing as it appears on the membership record for easy reference.

Membership subcategory. A membership subcategory defines, more specifically, the member's area of interest. For example, a zoo with a Junior Curator category in the Kid's Club program may also have the subcategories of Lion, Panda, Koala, Polar Bear, and Sea Turtle, to which each member who is most interested in that animal belongs.

Membership transaction. A membership transaction is used to describe the separate membership activities comprising a membership record. The activities can include adding, renewing, rejoining, upgrading, downgrading, and dropping a membership. For example, in February 2006, you add an individual membership for Mr. David Murphy. In January 2007, David decides to renew his membership. In this case, you made two separate transactions for David's membership record.

Navigate in Membership

The Memberships page is the place where you begin all membership data entry, such as creating a membership record or opening an existing membership record. From this page, you can also view a list of recently opened membership records and search for a membership record without accessing the Open screen for memberships.

You can add new membership transactions from the Memberships page or from the Membership tab of a constituent record. If you are adding new membership transactions for a group of records, we recommend you use the Memberships page. In this book, membership procedures are performed from the Memberships page. However, the main features of the Membership tab of a constituent record are discussed later in this book.

Parts of the Memberships Page

Note: When *MatchFinder* is installed on your computer, a **MatchFinder** button appears on the Records page. A **MatchFinder** button appears on the Org 1 tab of an organization record and on the General 2 tab of all organization relationship records. Also, if a constituent's matching gift is linked to a MatchFinder record, a **MatchFinder** button appears on the Matching Gifts screen of the Matching Gifts tab of the gift record. For more information, see the *MatchFinder Guide*.

To navigate in the optional module *Membership Management*, you must understand the parts of the Memberships page. To access the Memberships page, click **Records** on the Raiser's Edge bar, and click the **Memberships** link.
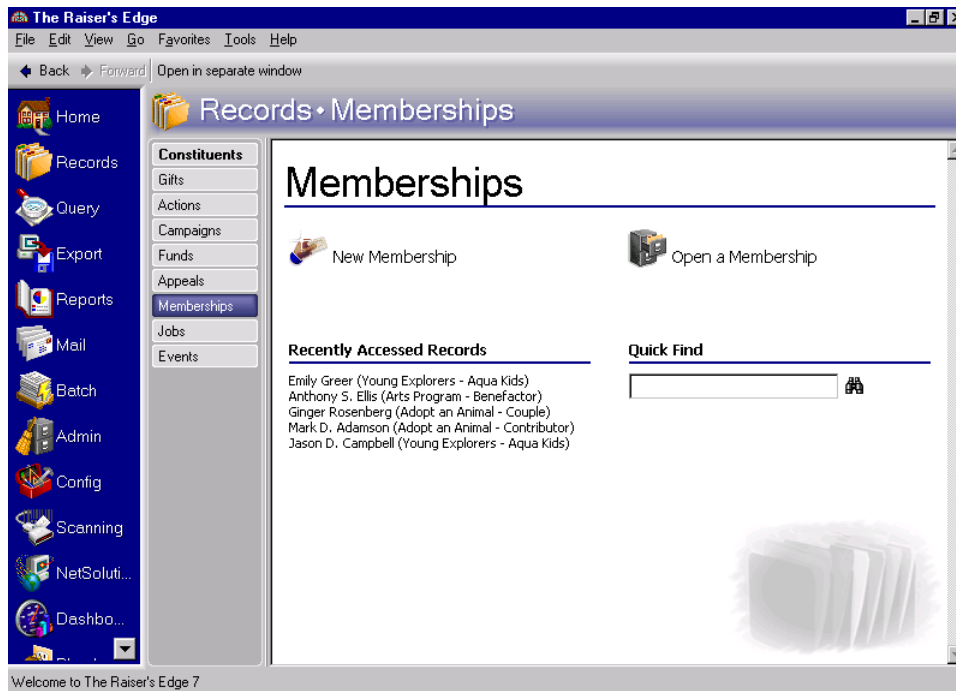
The Memberships page contains two main sections: membership links and membership locators.

Membership Links

Click the **New Membership** link to add a new membership record for a constituent. Click the **Open a Membership** link to select an existing membership record using the membership Open screen.

Membership Locators

Below the membership links are two areas you can use to search for a membership record. The **Recently Accessed Records** area displays a list of the most recently opened membership records. You can use the **Quick Find** field to enter the name of a constituent and locate his membership record without using the Open screen.
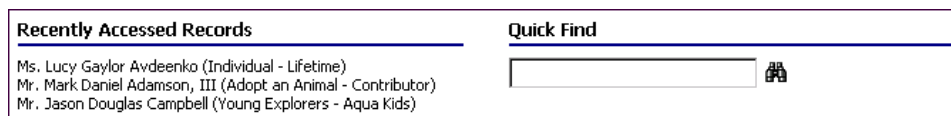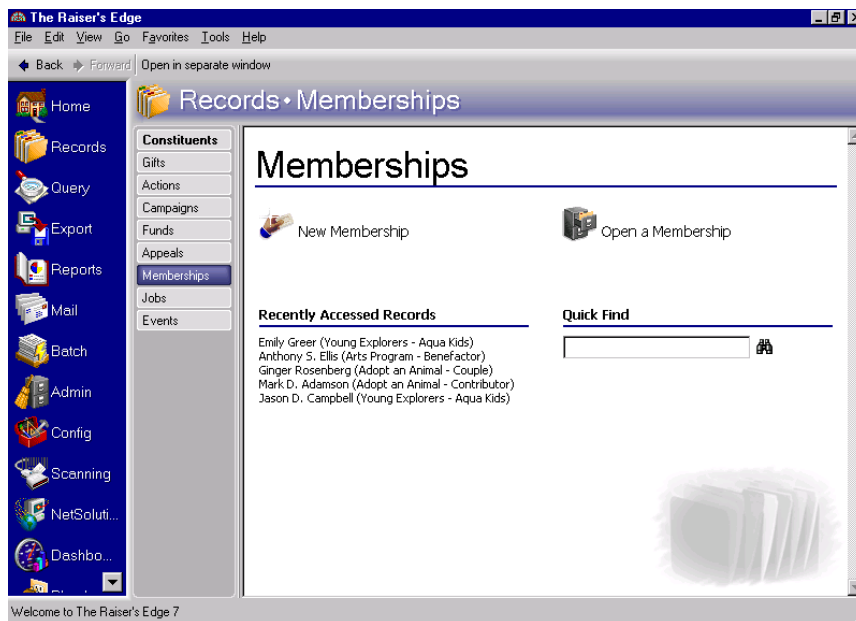
Access a Membership Record

Accessing a membership record means opening an existing record. You can open a membership record in several ways. Directly from the Memberships page by entering the constituent's name in the **Quick Find** field; by clicking the **Open a Membership** link on the action bar of the Memberships page; from the shell **File** menu; or from the **File** menu of an open record. We recommend opening membership records from the Memberships page because it is the easiest and most accessible option. You can also create a new membership record by clicking the **New Membership** link on the Memberships page.

▶ **Open a membership record**

To search for a membership record, you can use the **Open a Membership** link. The Open screen that appears serves as a search mechanism, helping you locate and open membership records. You can enter information in some or all the fields in the **Find Members that meet these criteria** frame to narrow your search for a membership record.

1. On the Raiser's Edge bar, click **Records**.

2. Click the **Memberships** link. The Memberships page appears.

3. From the Memberships page, click **Open a Membership**. The Open screen for memberships appears.

Note: We recommend using the criteria fields sparingly. Adding too much criteria can narrow your search too much, resulting in no matches.

4. In the **Find Members that meet these criteria** frame, enter the criteria you are using to search for the membership record. The criteria you can use to locate a membership record includes **Last/Org name**, **First name**, **Constituent ID**, **Account no.**, **Soc. Sec. No.**, **Membership starts, Membership ID**, **Category**, **Standing**, and **Program.** You can use any of the fields to enter member information with which to search for the record.

Note: If many membership records are listed in the grid, you can use the **Expand Results** button to make the results list area larger.

5. Once you enter all the search criteria you want to use, click **Find Now** to begin the search. The records matching the criteria you entered appear in the grid.

For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

6. Highlight the membership record you want to open and click **Open**. The selected membership record appears.

Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

7. Make the appropriate changes to the membership record. To save the information and exit the membership record, click **Save and Close** on the toolbar.

▶ **Search for a membership record using an existing query**

From the Open screen for memberships, you can also locate a membership record listed in a query group. This function is especially helpful if you know the record you are trying to locate is found in a specific query group, but you do not have enough information to locate the record using the fields in the **Find Members that meet these criteria** frame.

1. From the Memberships page, click **Open a Membership**. The Open screen for Memberships appears.

Note: You can search only for queries corresponding to the record type you want to locate. For example, if you use the Open screen for Membership, you have access only to membership queries.

2. In the **Search using query** field, enter the name of the query you want to use or click the binoculars to access the Open screen for *Query*. For more information about the query Open screen, refer to the Query chapter of the *Query & Export Guide*.

3. To access the records in the query group, click **Find Now**.

4. Highlight the record you want to open and click **Open**. The selected membership record appears.

5. Make the appropriate changes to the membership record. To save the information and exit the membership record, click **Save and Close** on the toolbar.

▸ **Search for a membership record from a new query**

If the fields in the **Find Members that meet these criteria** frame are not enough to locate the record you want, you can create a new query and use additional fields found in the membership record for a more exhaustive record search.

1. From the Memberships page, click **Open a Membership**. The Open screen for membership appears.
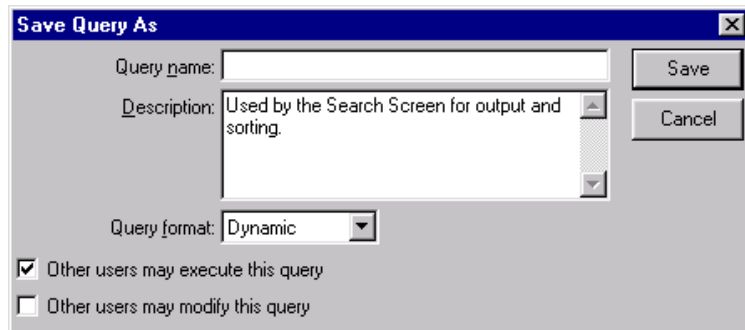

Note: You can create only a query corresponding to the record type you are trying to locate. For example, if you are searching for a membership record, you can create only membership queries.

2. In the **Search using query** field, click the **Query Design** button. A new query screen appears.

For more information about creating a query, refer to the Query chapter of the *Query & Export Guide*.
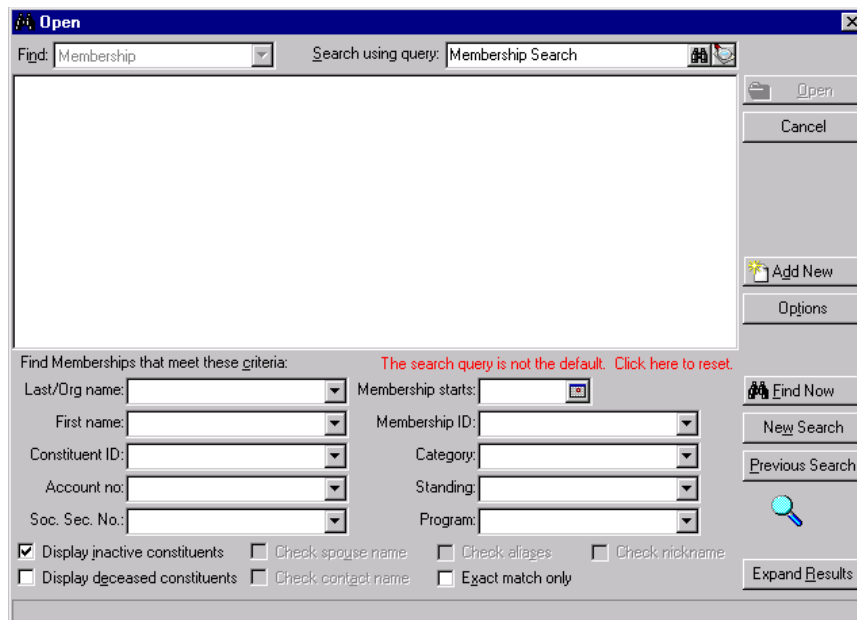
3. Once you select the criteria, output, and sort fields, click **Save and return to search**. The Save Query As screen appears.

4. In the **Query name** field, enter the name of the query.

5. "Used by the Search Screen for output and sorting." automatically defaults in the **Description** field. You can overwrite this information if you want to enter a different description.

6. In the **Query format** field, select "Dynamic" or "Static". For more information about query formats, see the Query chapter of the *Query & Export Guide*.

7. If you want to authorize other users to run your query, mark the **Other users may execute this query** checkbox.

8. If you want to authorize other users to change your query, mark the **Other users may modify this query** checkbox.

9. Click **Save**. You return to the Open screen. The saved query name defaults in the **Search using query** field.

10. To access the list of records grouped in the query, click **Find Now**.

11. Highlight the record you want to open and click **Open**. The selected membership record appears.

12. Make the appropriate changes to the membership record. To save the information and exit the membership record, click **Save and Close** on the toolbar.

Toolbar Buttons

The toolbar contains buttons representing common commands used with membership records. By clicking these buttons you can easily perform a function, such as saving, without using the menu bar.

> **Note**: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item in the toolbar. For more information about setting up this user option, see the User Options chapter of the *Program Basics Guide*.

Save the current record and keep it open

Print membership renewal letter or a membership card

Preview a membership renewal letter or a membership card prior to printing

First Membership record

Previous Membership record

Next Membership record

Last previous record

Go to the constituent record

Renew a membership

Rejoin a membership

Drop a membership

Upgrade a membership

Downgrade a membership

Add to favorites

Properties

Access Help Contents

Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only when you have the optional module *VBA for Advanced Customization*.

User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools**, **User Options** from the menu bar on the shell of *The Raiser's Edge*. The Options screen appears so you can establish certain user options that apply to membership records. For more information about user options, see the User Options chapter of the *Program Basics Guide*.

▶ **Establish membership user options**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Records tab.

3. From the tree view on the left, select **Memberships**. The Memberships user options appear on the right.
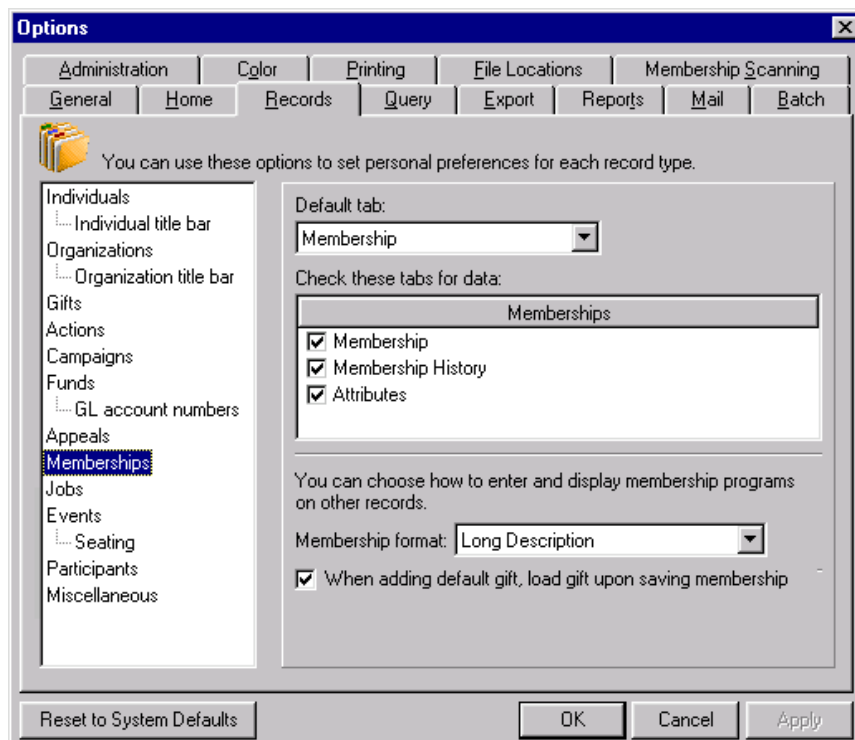
4. In the **Default tab** field, select the tab you want to automatically appear when you add or open a membership record.

5. If you use the **Check these tabs for data** preference, the tabs that contain data appear with a check mark. In the **Memberships** frame, mark the checkbox by the tabs you want the program to search for data.

6. In the **Membership format** field, select how you want membership program names to appear throughout *The Raiser's Edge*. You can select "Short Description" or "Long Description".

7. When you receive a gift which is to be used to pay membership dues, you want to link the gift to the membership. To determine that you want to automatically load the gift record linked to a membership record, mark the **When adding a default gift, load gift upon saving membership** checkbox.

8. Click **Apply** to apply and save your preferences or click **OK** to save and close the Options screen.

Membership Business Rules

> **Note**: Membership business rules can be used to maintain data entry consistency in membership information. You can also use the business rules as a shortcut mechanism for data entry.

Business rules are ways for you to control functions and displays throughout *The Raiser's Edge,* and are visible only to users who have been given appropriate security rights. Business rules affect all users of the program. You can establish business rules for all membership records. You can assign several specific types of membership business rules in the **Name display**, **Membership** business rules, **Generate IDs** business rules, and in the **Membership options**, **General** and **Activity** business rules. For detailed information about establishing business rules or user access rights, see the Configuration and Security chapters of the *Configuration & Security Guide*.

Name Display, Membership Business Rules

▶ **Define default membership name display rules**

Select the default for how a name appears in the **Name on card** field on a membership record.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Name display**, select **Membership**. The membership name display rule options appear on the right.
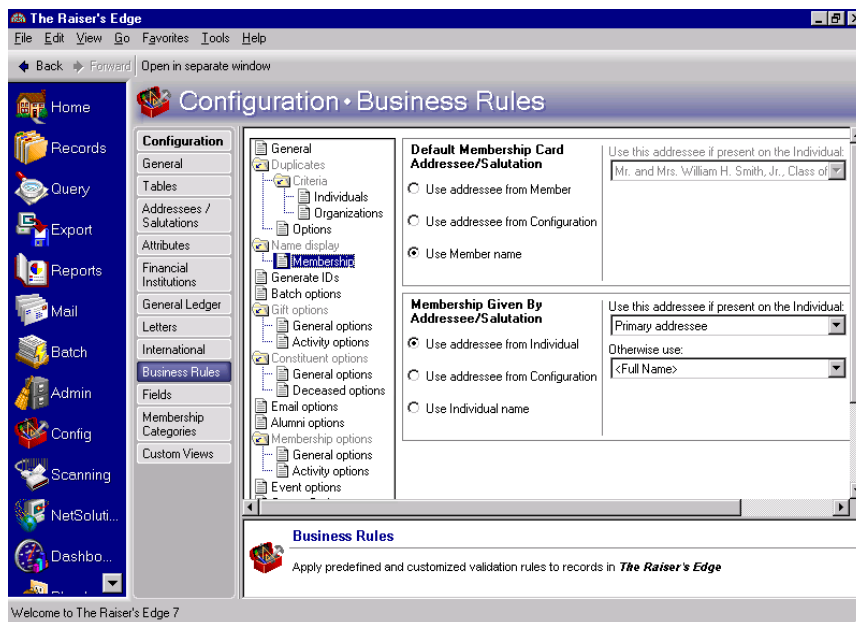
Note: If the program finds no selected addressee/salutation, it uses Name (First name, Middle name, Last name).

4. In the **Default Membership Card Addressee/Salutation** frame, if you mark **Use addressee from Member**, you can select an addressee/salutation from the individual record. Specify your entry in the **Use this addressee if present on the Individual** field. You must also specify an entry in the **Otherwise use** field (which contains the additional choices of Name and Constituent ID) for the program to use as a backup if it cannot find the first addressee/salutation format you specify.

Note: An embedded addressee/salutation lets you define the addressee/salutation each time you use it. For more information about embedded addressee/salutations see the Configuration chapter of the *Configuration & Security Guide*.

If you mark the **Use addressee from Configuration** option, you can select any defined addressee/salutation plus any embedded addressee/salutations in the program. If you select an embedded addressee/salutation (Const Addr/Sal), the **Use this address if present on the Individual** and **Otherwise use** fields appear and you must specify entries in them.

If you mark the **Use Member name** option, the fields are disabled and the program uses the name from the membership record.

5. In the **Membership Given by Addressee/Salutation** frame, select an option for the default display of the addressee/salutation for the individual who gives the gift of membership. Your selection determines how the name of the person giving the membership is displayed on the membership record. The options are the same as those for membership cards.

6. After you make changes to Business Rules, your preferences update right away.

Generate IDs Rules

Note: Auto IDs are sequential and unique. They can be generated only in numeric form.

You can specify business rules for generating automatic ID numbers for several record types. Automatic IDs for record types are assigned in the order the records are added. Auto IDs are sequential and unique. They can be generated in numeric form. You can use these IDs to streamline your data retrieval in queries and searches.

▶ **Define default business rules for generating IDs**

You can set defaults to establish membership record IDs and select how the IDs will number when adding a new membership record.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, select **Generate IDs**. The rule options for generating IDs appear on the right.
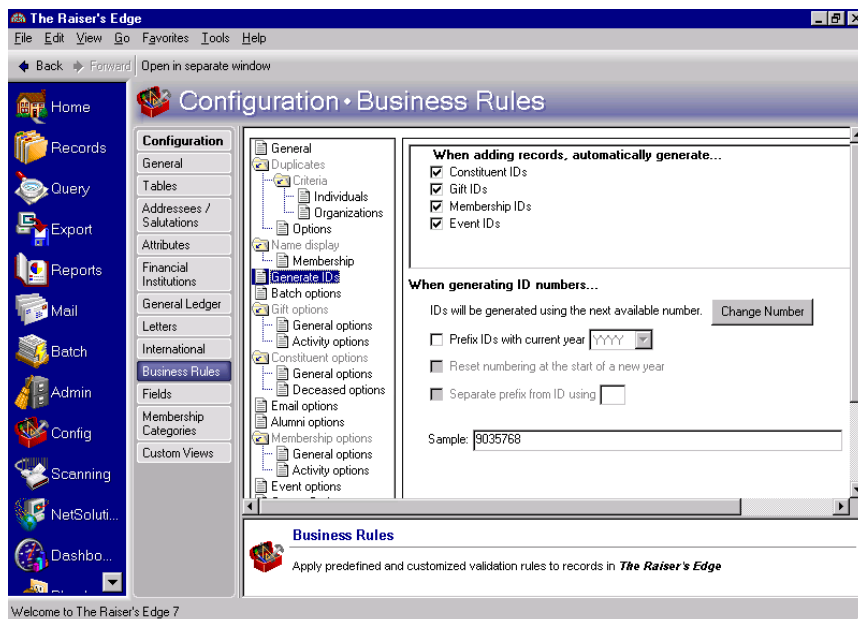
4. To generate membership IDs automatically when you save the membership record, mark the **Membership IDs** checkbox in the **When adding records, automatically generate** frame.

5. *The Raiser's Edge* generates IDs using the next available number. To change the next number from which the program starts, click **Change Number**. The program generates ID numbers by searching for the lowest available number that occurs after the ID number listed in the **When generating ID numbers** frame. You can click **Change Number** to find and change the reference number the program uses to find a unique ID number. When you click **Change Number**, the Change Next Available ID Number screen appears.

6. In the **Next Available ID** column, the program displays the number last used to generate an ID, plus one. If you want the program to start with another number when it searches for the next unused ID number when you add a **Record Type**, enter it here.

   When you place the cursor in the **Next Available ID** field for a record type, a button in the field is enabled. When you click the button, the program starts at zero and searches for the next unused ID number available for that record type. You can use this button to ensure you have no gaps in your ID numbering.

7. To return to the rule options for generating IDs, click **OK**.

Note: If you mark the **Prefix IDs with current year** checkbox, you can reset your IDs to begin numbering again at the start of a new year.

8. To display the year before the ID number, mark the **Prefix IDs with current year** checkbox. This checkbox is enabled when you mark a record type checkbox. In the corresponding field, enter whether you want the year to display as two or four characters. When you mark this checkbox, you affect all record types. You also enable the **Reset numbering at the start of a new year** and the **Separate prefix from ID using** checkboxes. Placing the year before the ID number lets you identify at a glance the year the record was added.

Warning: Be careful when using prefix numbers with a year. If you decide not to use the prefix during the year and change the option, when the program searches for the next available number, it does not take into account numbers already entered with the prefix. For example, if you entered IDs prefixed with 2006 and then change the option to include no prefix, the program will show the next available ID number as "1".

9. To begin with number one when creating IDs in a new year, mark the **Reset numbering at the start of a new year** checkbox.

10. Mark the **Separate prefix from ID using** checkbox if you want to separate the year from the ID number, and enter the symbol you want to use in the corresponding field. For example, if you enter a forward slash in this field and select the year to display as four characters, the program formats the constituent ID as "2006/762."

    The **Sample** field displays an example of the ID options you select.

11. After you make changes to Business Rules, your preferences update right away.

Membership Options, General Business Rules

You can define business rules for membership categories with gift defaults that are already established, membership transactions that are linked to a pledge, and other general defaults for memberships.

▶ **Define general business rules for memberships**

You can define rules for start dates for new or renewed memberships, rules for linking gifts to memberships, rules for applying pledge payments to memberships, rules for programs and categories for dues, and rules for the maximum number of members for a membership. If you use these default rules, *The Raiser's Edge* enters information automatically when you create new memberships, saving you the time of entering it manually.
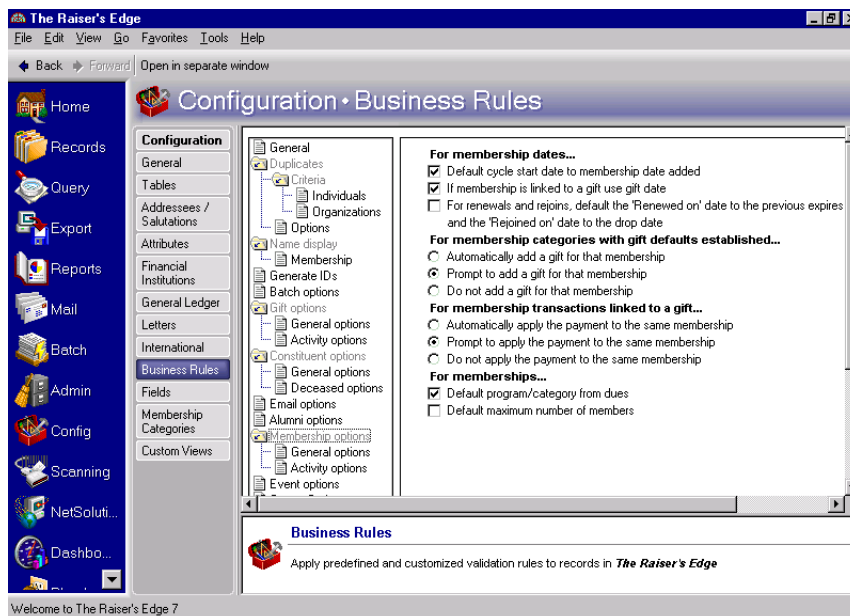
Note: You do not have to activate any of the General Membership Rules.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Memberships**, select **General**. The general rule options for memberships appear on the right.

4. Under **For membership dates**, when you mark the **Default cycle start date to membership date added** checkbox, the **Joined on** and **Renewed on** dates default to the date the membership is added, usually the current date. When you mark this checkbox, the **If membership is linked to a gift use gift date** and **For renewals and rejoins, default the 'Renewed on' date to the previous expires date, and the 'Rejoined on' date to the drop date** checkboxes are enabled.

Note: If you globally add a membership record through *Admin*, the **Joined on** date defaults to the current program date, no matter what setting you select in **Business Rules**.

5. When you mark the **If membership is linked to a gift use gift date** checkbox, the **Joined on** and **Renewed on** dates default to the gift date for memberships that are linked to gifts. This rule applies only to memberships created from a gift record. Linking a membership to a gift from the membership record does not change the gift date. If the membership is not linked to a gift, the date defaults to the date the membership is added.

Note: A membership transaction includes all individual membership activities on the membership record, such as renewals, rejoins, drops, upgrades, downgrades.

6. When you mark the **For renewals, default 'Renewed on' date to previous 'Expires' date** checkbox, the **Expires date** of the previous membership transaction changes to the **Renewed on** date for the renewal being entered. You can use this checkbox to avoid overlapping memberships if a member renews before the current membership expires.

7. Under **For membership categories with gift defaults established**, if you set up gift defaults for a membership category, you can choose from several options. For information about establishing gift defaults for a membership category, see the Configuration chapter of the *Configuration & Security Guide*.

   To automatically add a gift (for the membership dues) and link it to that membership, mark the **Automatically add a gift for that membership** option.

Note: You can automatically add the cost of a membership as a gift on the constituent record Gift tab.

   When you mark the **Prompt to add a gift for that membership** option and you have set up gift defaults for the membership category, a message appears verifying you want to add the gift and link it to that membership before the program does so.

If you mark the **Do not add a gift for that membership** option, no gift is added for this membership. You can still add the gift manually and link it to the membership.

8. Under **For membership transactions linked to a gift**, when you mark the **Automatically apply the payment to the same membership** option, the payment is applied to the same membership as the pledge, but a membership transaction is not added. Usually if you mark this option, you are not renewing, rejoining, upgrading, or downgrading the membership with pledge payments.

   When you mark the **Prompt to apply the payment to the same membership** option, the program asks if you want to apply the pledge payment to the membership before returning to the main Gifts screen.

   When you mark the **Do not apply the payment to the same membership** option, the payment is not automatically applied to the same membership. If you mark this option, the program assumes you link pledge payments to memberships manually.

9. Under **For memberships**, when you mark the **Default program/category from dues** checkbox, the program and category for a membership default once the dues are entered. For example, you may specify a program and category for minimum dues of $1,000 and maximum dues of $2,000. When you mark this checkbox and create a new membership, if you enter a dues amount between the above amounts, the program and category automatically default into the membership record. You can overwrite these defaults.

10. When you mark the **Default maximum number of members** checkbox, the maximum number of members from **Membership Categories** defaults to the **Total number of members on this membership** field on the Other Members and Card Information screen of the membership record.

11. After you make changes to Business Rules, your preferences update right away.

Membership Options, Activity Business Rules

Note: You can set a business rule to establish whether or not you allow constituents to have more than one membership at the same time.

You can set business rules for adding new memberships, saving gifts of membership, and renewing memberships. Decide whether or not to allow multiple concurrent memberships for constituents and who gets credit for gifts of membership. You can set a rule to determine the maximum period of time you allow a lapsed membership to be renewed.

▶ **Define activity defaults for memberships**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Membership options**, select **Activity options**. The activity rule options for memberships appear on the right.
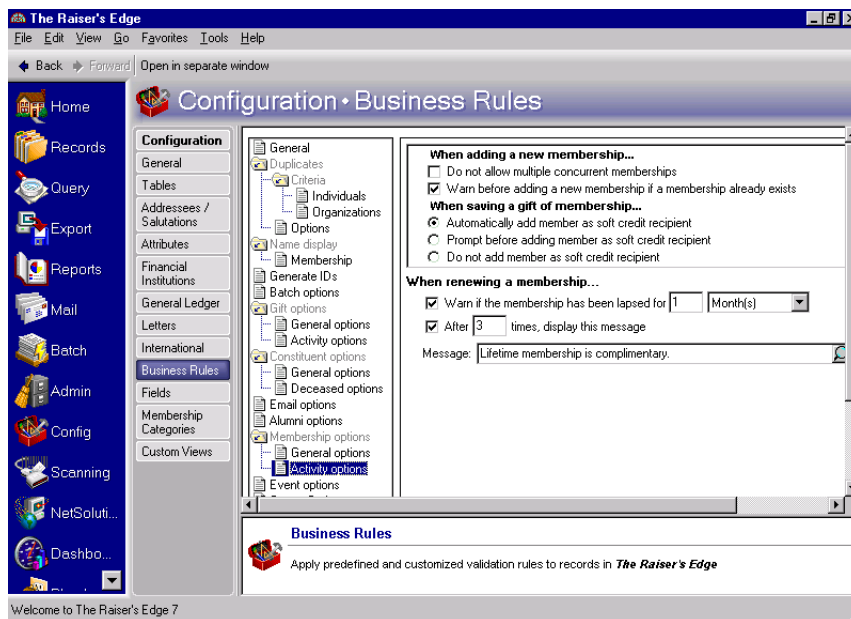

Note: When you mark the **Do not allow multiple concurrent memberships** checkbox, the **Warn before adding a new membership if a membership already exists** checkbox is disabled.

4. Under **When adding a new membership**, mark the **Do not allow multiple concurrent memberships** checkbox if you do not allow constituents to have multiple memberships at the same time. If a user attempts to add multiple memberships to a constituent, a message appears.

5. You can mark the **Warn before adding a new membership if a membership already exists** checkbox to indicate whether or not you allow constituents to have more than one membership at the same time.

   When you mark this checkbox, if a user tries to add a new membership to a constituent who already has a membership, a message appears.
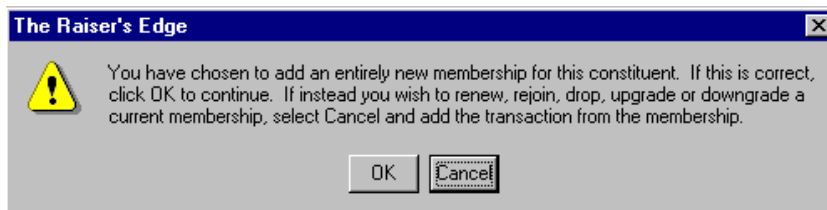
6. Under **When saving a gift of membership**, when you mark the **Automatically add member as soft credit recipient** option, members receiving gifts of membership that are linked to the gift record of the individual who gave the gift are added as soft credit recipients. This applies only to the primary member, not joint members.

   When you mark the **Prompt before adding member as soft credit recipient** checkbox, the following message appears.
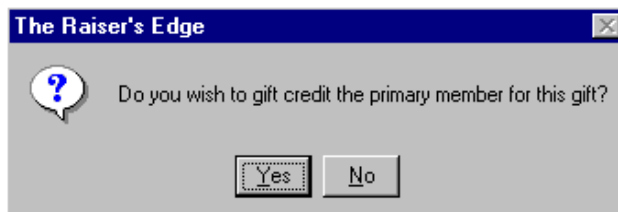
   You may want to set this rule if, for example, a husband has a constituent record in the database and gives a gift of membership to his wife who also has a constituent record. Because the husband is paying the dues, the membership can be linked to a gift on his record. If you want the gift to also appear on the wife's gift history, you can soft credit her record by marking the **Automatically add member as soft credit recipient** checkbox. Or, you can mark the **Prompt before adding member as soft credit recipient** checkbox and click **Yes** on the message screen.

   When you mark the **Do not add member as soft credit recipient** checkbox, the soft credit is not added to the record of the primary member, and the program asks you no further questions.

Note: You may want to set warnings for membership expirations if you do not allow renewals for memberships that have been lapsed for a certain period of time, or if you track memberships by dropping and rejoining them.

7. Under **When renewing a membership**, when you mark the **Warn if the membership has been lapsed for** checkbox, you can set a time period for which a membership has been lapsed to initiate a warning.

   For example, if your organization does not renew memberships lapsed for over a month, you can set a warning to appear when a membership has been lapsed for this amount of time.

8. When you mark the **After [ ] times, display this message** checkbox you can define a warning message to appear after a membership has been renewed a certain number of times. When you mark the checkbox, the **Message** field is enabled so you can enter the text that appears in the warning message. For example, you can create a message to remind your users to make sure the address and phone information on the member's constituent record is up-to-date after a yearly membership has been renewed two times.

Note: An entry in the **Message** field is required. There is no default message.

When you click the magnifying glass in the **Message** field, the Define Message screen appears, so you can more easily view the text you enter. Your message can contain up to over 1000 characters.

9. After you make changes to Business Rules, your preferences update right away.

Understand the Membership Record

The membership record contains all the membership information associated with a particular constituent in your database. This record stores membership specific information in addition to historic membership entries related to each specific membership transaction. You can also store attributes and notes on the membership record. From User Options, you can customize the membership record. You can elect to have a red check mark appear on tabs and buttons that contain data or have membership legends appear in different colors.

Note: The Membership History tab is visible once you save the membership record.

The membership record is composed of three tabs: the Membership tab, the Membership History tab, and the Attributes/Notes tab.

Membership Tab

On the Membership tab, you can store general information pertaining to a specific membership transaction. For example, you can store the name of the constituent associated with the membership, the membership ID, and the program and dues structure for the membership. You can also store more detailed membership information including the current transaction type, benefits associated with a membership and the number of individuals receiving benefits from the membership, and past membership renewal history.

When you integrate *The Raiser's Edge* with *Blackbaud Netcommunity*, a **NetCommunity transaction** checkbox appears on the Membership tab. If the member joined via your Web site, the checkbox is automatically marked when the membership transaction downloads from *Blackbaud NetCommunity*. You can manually mark this checkbox if needed. For more information, see the *Blackbaud NetCommunity Integration Guide*.

Membership History Tab

Note: The appearance of the information on the Membership History tab varies depending on the options you select on the Legends screen. For more information about membership legends, see the User Options chapter of the *Program Basics Guide*.

The Membership History tab, which is visible once you save a membership record, displays a historic listing of all transactions for a specific membership record. For example, if you enter a membership for a constituent who decides to terminate his membership two months later, the Membership History tab lists the date the member joined and the date the member terminated his membership. The **Membership History Items** grid displays the date of each membership transaction, the transaction type, the membership program, category and subcategory, and the solicitor assigned to the membership.

Attributes/Notes Tab

On the Attributes/Notes tab, you can store miscellaneous information about a membership record. You can add attributes by selecting the **Category** of attribute for which you want to see. You set up Attributes categories from the **Attributes** link of *Configuration*. For more information about setting up attribute categories, see the Configuration chapter of the *Configuration & Security Guide*. You can add additional information you need for the membership record in the **Notes** box. Membership attributes and notes are stored per membership record and not for each membership transaction. This means that the notes and attributes are overall comments about a membership and not specific to any one transaction.
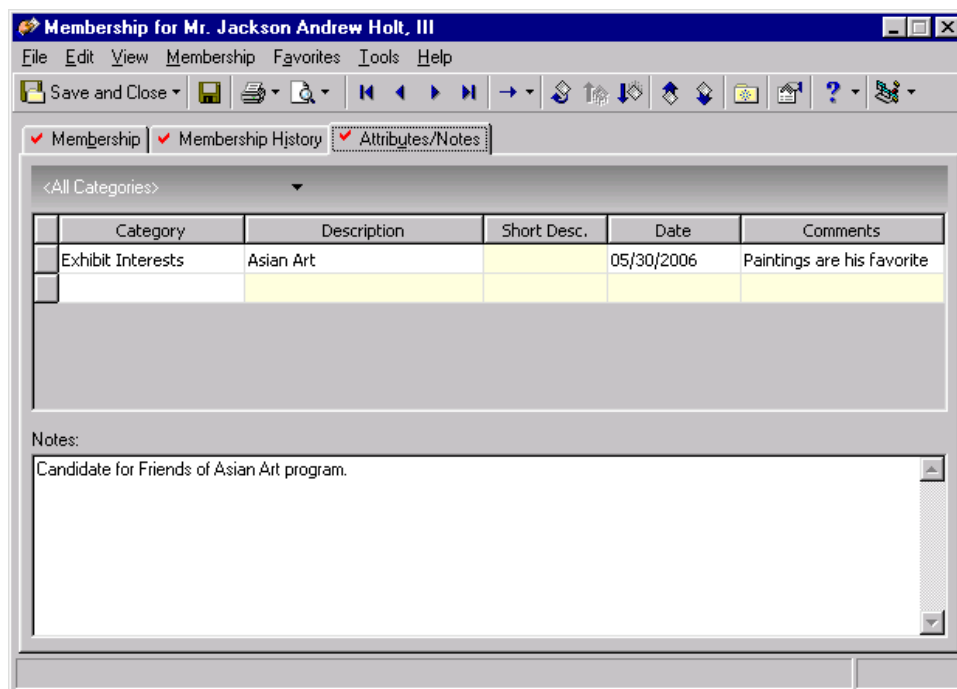
Understand Membership Benefits

Membership benefits are gifts your organization gives to constituents depending on the level of membership they agree to join or the dues they decide to pay. For example, a Junior Curator member can receive a newsletter, a reduced zoo entrance fee, and free passes for certain events. Membership benefits are associated with dues, in terms of the benefit package a member receives. Although the dues are not considered payment for the benefits a member receives, the benefits value may account for a difference between an initial gift amount and how much that gift actually costs.

Calculating the benefits package monetary amount is important, especially if the benefits package is associated with a gift. Receipts for all gifts associated with membership benefits should take into account the monetary value of the benefits. For example, a constituent donates a gift of $2,000, $500 of which goes to pay for a membership with benefits worth $250. The constituent should receive a receipt for his contribution, but only $1,750 of that gift is the tax-deductible contribution.

Membership Categories

Membership categories define the level of giving required for a constituent to gain membership into one of your member groups. For example, you work in a library which has membership categories of Patron, Friend, and Individual Member. Once you create these membership categories, you can then assign membership dues associated with each category. You can define membership categories based on program titles, minimum and maximum dues amounts, and number of members. Your ability to establish membership categories is based on your access rights defined in **Security**. It is helpful and efficient to enter membership category information before you set up your individual membership records, which can help speed membership data entry and maintain consistency in your database.

To view a membership category, click **Config** on the Raiser's Edge bar. The Configuration page appears. Click **Membership Categories**.
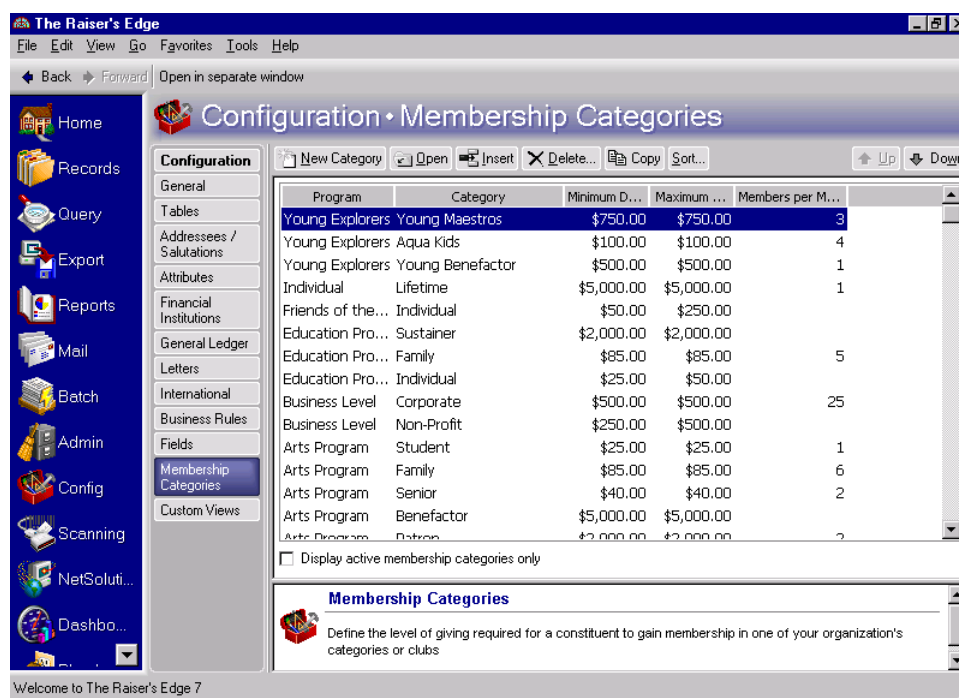
A list of established Membership Categories appears. Highlight an existing membership category you want to edit and click the **Open** link on the action bar, or click the **New Category** link to set up a new membership category.

The Membership Category screen is composed of four tabs: the General Information tab, the Default Benefits tab, the Default Settings tab, and the Renewal Information tab.

General Information tab. On the General Information tab of the membership category record, you can define membership categories, programs, subcategories, and establish dues required to qualify for this membership category. You can also establish other default membership information, including the maximum number of members allowed under the primary cardholder's membership and whether the membership category is inactive.

Default Benefits tab. On the Default Benefits tab, you can enter the default benefits information for the membership category. These benefits can include magazines, newsletters, and store discounts. On this tab, you can also determine whether benefits should be given to the primary member or to a donor who has given a gift of membership.

Default Settings tab. On the Default Settings tab, you can enter all the default membership renewal information including the status and the number of cards to print. You can also determine how the program should calculate the expiration date of memberships.

Renewal Information tab. The Renewal Information tab helps you set up the frequency with which you alert members their membership is going to expire. On this tab, you can also establish a default for how long the membership can be lapsed before it should be dropped.

For more information about establishing membership categories, see the Configuration chapter of the *Configuration & Security Guide*.

Membership Checklist

Before you begin entering membership information for your constituents, you should establish certain settings in the program to help make data entry quicker and to ensure the consistency of information in your database. This short checklist provides some suggestions.

Most of the initial setup occurs in *Configuration.* Access to this area of ***The Raiser's Edge*** is determined by your access rights defined in **Security**. This checklist offers an overview of the steps you need to follow to set up membership information in advance. For detailed instructions about how to establish membership defaults, see the Configuration chapter of the *Configuration & Security Guide*.

❑ Tables

Using the **Tables** link on the Configuration page, you can set up the tables for membership benefits, membership categories, membership subcategories, membership programs, membership reasons, and membership card types. You can also access these table entries from the Membership Category screen.

❑ Letters

Using the **Letters** link on the Configuration page, you can set up any letters you want to link to your membership records, including renewal notices and membership reminders. You can name the type of letter you want to set up and assign the appropriate merge fields that coincide with the document in your word processor.

❑ Business Rules

Using the **Business Rules** link on the Configuration page, you can determine general and activity business rules for your membership records. General business rules include determining how names display in a membership record, whether membership IDs are automatically generated, whether pledge payments are automatically applied to memberships, and whether the membership category and program should automatically appear when you enter the dues amount. Activity business rules determine if you can enter members with multiple concurrent memberships and let you set up a warning when memberships are ready to expire.

❑ Membership Categories

On the Membership Category screen, accessed by clicking **Config** on the Raiser's Edge bar, you can establish default settings for all your membership categories. On this screen, you can define your category/program combinations and the associated dues structure. You can determine the benefits associated with each category/program combination and establish default information for membership renewal.

❑ Mail

Using *Mail*, you can set up the parameter files for forms, including renewal notices and membership cards. Once these parameter forms are set up, you can print renewal notices and membership cards from a membership record or use the options available in *Mail* to print numerous membership cards and renewal notices. For more information about mail forms, see the *Mail Guide*.

Work with Membership Records

Once you are familiar with the terms and concepts associated with the optional module *Membership Management*, you are ready to begin entering membership information for constituents. The procedures in this section provide the basic information needed to perform the membership transactions presented later in this book. The procedure sections show one way you can accomplish each described task.

You can add new membership transactions from the Membership tab of a constituent record or from the Memberships page. In this section, all membership transactions are performed from the Memberships page. The main features of the Membership tab of a constituent record are discussed later in this book.
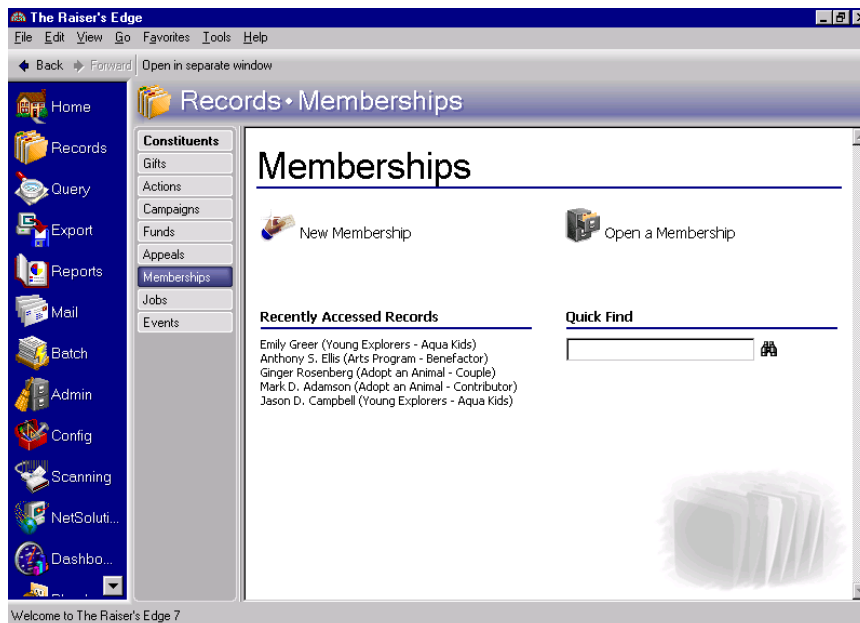
General Membership Information

Membership records store information about a constituent's membership with your organization, such as date of joining, renewal history, membership categories to which she belongs, membership solicitors, benefits, and gift records associated with the membership. The information stored on membership records helps you produce reports to analyze membership activity, print lists and directories of members, and perform specific mailings, such as preparing membership cards and renewal notices. In addition, you can use a membership query to locate lapsed members who did not respond to renewal notices, upgrade or downgrade memberships based on the payment of dues, and renew members who want to remain active.

▶ **Add a membership record**

> *Scenario:* David Murphy pledged to become a Patron in support of the Art Acquisition Club of the Arts Program at your museum. The dues for the Patron category are $2,000 and the membership is renewable every 12 months. Add a membership record for David. Make sure David receives renewal notices when the membership is close to its expiration date.

1. On the Raiser's Edge bar, click **Records**.
2. Click the **Memberships** link. The Memberships page appears.

Note: You can also add a membership by clicking **New Membership** on the Membership tab of a constituent record or by selecting **File**, **New, Membership** from the shell menu bar.

3. Click **New Membership**. The new membership record appears.

4. In the **Constituent** field, click the binoculars to access the Open screen for memberships, so you can search for David in your database. Once found and selected, the constituent name appears in this field. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide.*

Warning: To ensure data entry consistency, we recommend you establish preferences to automatically generate ID numbers. For more information about automatically generating IDs, see "Generate IDs Rules" on page 18.

5. In the **Membership ID** field, enter "234765" as a membership number for David. Membership IDs are stored per membership record. If you change the membership ID on a transaction, the change rolls back to all previous membership transactions.

6. In the **Dues** field, enter the amount $2,000. The Select Program/Category screen appears.

7. Highlight "Arts Program/Patron" and click **OK**. You return to the New Membership screen.

The **Program** and **Category** fields automatically default based on your selection on the Select Program/Category screen.

You can click the down arrow in the **Category** field and choose the appropriate program/category combination, if you set up the information in *Configuration*. For more information about setting up membership categories, see the Configuration chapter of the *Configuration & Security Guide*.

You can also click **Auto Pick** to select the program/category combination. When you click **Auto Pick,** the Select Program/Category screen appears, displaying a list of available program/categories, based on the dues amount entered. Highlight the **Program/Category** combination you want to use and click **OK**. The information automatically fills in the appropriate fields on the membership record.

The **Auto Pick** button is enabled only if you set up your membership program, category, and subcategory information in *Configuration*. For more information about membership categories, programs, and subcategories, see "Membership Categories" on page 30.

Note: You cannot enter information directly into the **Subcategory** field on the membership record. All membership subcategories must be established in advance in *Configuration*.

8. In the **Subcategory** field, select "Art Acquisition Club".

9. In the **Date Joined** field, enter the date 03/07/2006. You can click the calendar to select a date.

10. In the **Expires** field, enter the date 03/07/2007 as the expiration date or click the calendar to select a date. If you established the default settings on the Membership Category screen of *Configuration,* you can tab down to the **Expires** field from the **Date Joined** field. The expiration date automatically defaults. For information about defining how the program calculates expiration dates, see the Configuration chapter of the *Configuration & Security Guide*.

Note: The default information defined on the Renewal Information tab of the Membership Category screen in *Configuration* determines who receives renewal notices when there is a gift of membership.

11. To make sure David is notified when the membership is close to expiring, mark the **Print renewal notices** checkbox. For more information about determining when renewal notices are sent out, see the Configuration chapter of the *Configuration & Security Guide*.

12. In the **Reason** field, select "Moved" because David recently relocated to your town.

13. In the **Comments** field, enter "Mr. Murphy was a Patron of the local museum in his hometown of Hopewell, VA."

14. To save the information and close the membership record, click **OK**.

Lifetime Memberships

With *The Raiser's Edge,* you can establish and track lifetime memberships for your constituents.

▶ **Establish lifetime memberships**

Once you set up a lifetime membership, you can always track membership information, even after the constituent is deceased. However, if you want to track lifetime memberships accurately, you should drop lifetime memberships of constituents who are deceased because they are no longer active participants in your membership program. When you run reports, the record of the membership still exists, but deceased constituents do not appear on your report, unless you request that information.

1. On the Raiser's Edge bar, click **Records**.

2. Click **Memberships**. The Memberships page appears.
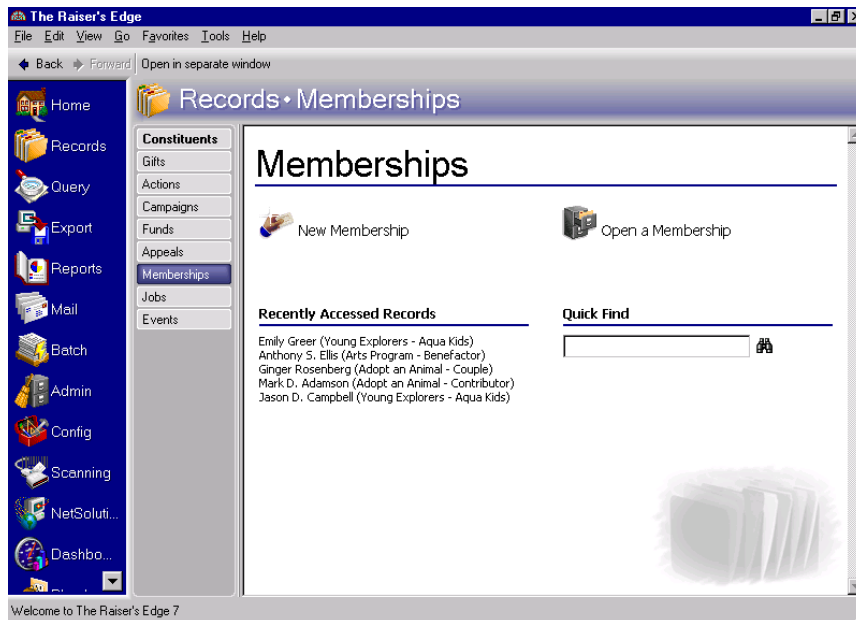
3. Click **New Membership**. The New Membership screen appears.

4. In the **Constituent**, **Membership ID**, **Dues**, **Program**, and **Category** fields, enter the information for your lifetime membership. For more information about how to enter information in these fields, see "Add a membership record" on page 34.

5. In the **Date Joined** field, enter today's date by pressing **F3** on your keyboard.

Note: When you mark the **Lifetime** checkbox, the **Expires** field and the **Print renewal notices** checkbox become disabled.

6. To indicate the new membership is a Lifetime membership, mark the **Lifetime** checkbox.

7. To save the information and exit the membership record, click **OK**.

Membership Solicitors

In *The Raiser's Edge*, you can track solicitors involved in your organization's membership drives and transactions. Solicitors are constituents who, on behalf of your organization, urge a new member to join. For example, during your organization's annual phonathon, Allison Andrews contacts David Murphy and convinces him to become a member. You can credit her as a solicitor on David's membership record. Solicitors at your organization must be entered in the database as constituents and must have the **Constituent is a solicitor** checkbox marked on the Bio 1 or Org 1 tab of the constituent record before the solicitor can be assigned to another constituent's membership record. For more information about solicitors, see the Solicitors chapter of the *Constituent Data Entry Guide*.

▶ **Add a solicitor to a membership record**

> ***Scenario:*** In his letter requesting a new membership with your museum, Mr. David Murphy informs you he received a call from Allison Andrews about becoming a member. David credits Allison's efforts for prompting him to become a member. Enter Allison Andrews as a solicitor on David's membership record. This procedure uses the membership record created in "Add a membership record" on page 34.

1. From David Murphy's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For information about opening a membership record, see "Open a membership record" on page 6.

2. From the Membership tab of David's membership record, click **Solicitors**. The Solicitors Credited for this Membership screen appears.

3. To search for the name of the solicitor you want to link to the membership record, click the binoculars. The Open screen appears so you can search your database for Allison Andrews. For more information about locating a constituent record on the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

4. From the list on the Open screen for constituents, highlight Allison Andrews' name and click **Open.** Her name automatically appears on the Solicitors Credited for this Membership screen.
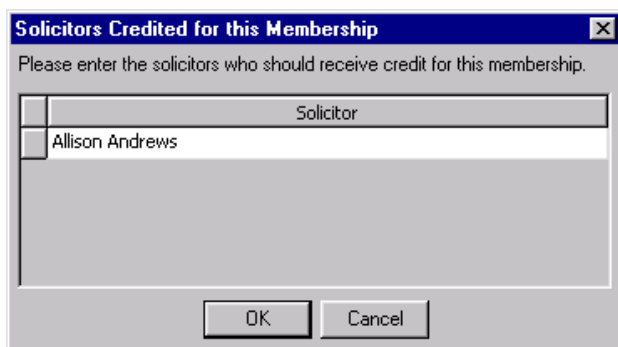
5. To save the solicitor information in the membership record, click **OK**. You return to the Membership tab**.**
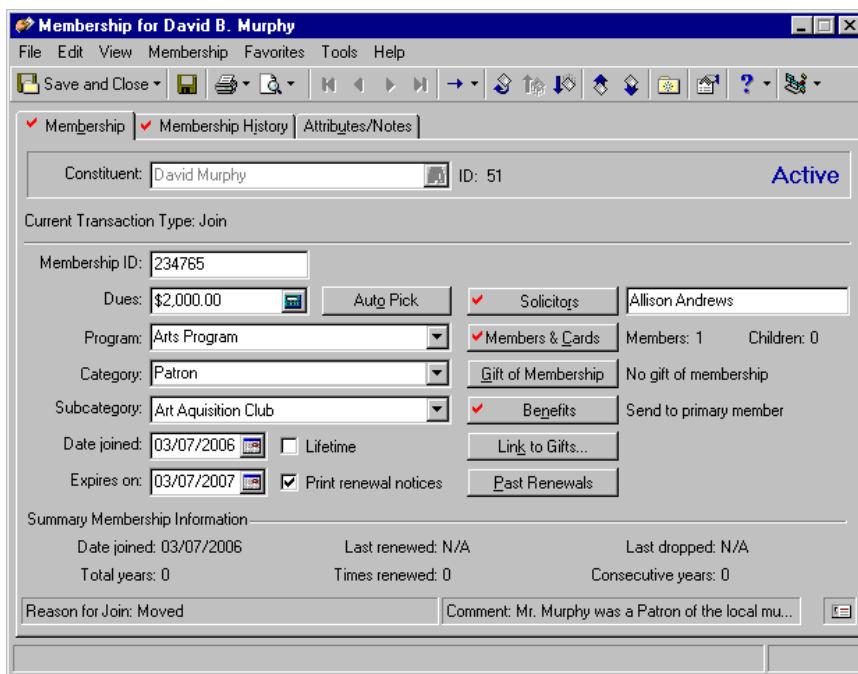
6. To save the new information and exit the membership record, click **Save and Close** on the toolbar.
7. From David Murphy's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For information about opening a membership record, see "Open a membership record" on page 6.

Members and Card Information

On each membership record, you can store and keep track of the number of additional members and cards issued under the primary membership. This may be helpful if your organization offers family memberships or allows memberships to be extended to guests of the primary member. You can determine the maximum number of additional members under a membership and print additional membership cards. The default limit for additional members under the primary cardholder's membership is established on the General Information tab of the Membership Category screen in *Configuration.*

▶ **Add other members and card information**

Scenario: Margaret Murphy wants to make sure she is included on her husband's membership. There is a possibility she may be attending the museum without David, so she requests to receive a membership card in her name, Mrs. Margaret Lisbeth Murphy. Add Margaret as a Joint member on David's membership record. This procedure uses the membership record created in "Add a membership record" on page 34.

Scenario:

1. From David Murphy's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For information about opening a membership record, see "Open a membership record" on page 6.

Warning: The name of the primary card member in the Other Members and Card Information screen automatically defaults, but you must specify the names of additional cardholders on this screen.

2. Click **Members and Cards**. The Other Members and Card Information screen appears.

3. To add Margaret on the membership, click **New Joint Members/Card Recipients** on the action bar. The New Joint Member or Card Recipient screen appears.

Warning: You must mark the **Joint Member** checkbox on you want the name of the joint member to appear in membership reports.

4. To enable the **Relationship record** field, mark the **Joint Member** checkbox.

5. To search for Margaret, the relationship you want to add to this membership record, click the binoculars in the **Relationship record** field. The Search Relationships screen appears. When you find and select Margaret's name, click **Open**.

If the relationship you want to add is not listed as a relationship in the constituent record, click **Add New** to add a new relationship. For more information about adding relationships to constituent records, see the Relationships chapter of the *Constituent Data Entry Guide*.

Note: You cannot edit the **Relationship record** field once you save the information in the **Joint Member** frame. If you want to change this information, you must delete the Joint Member or Card Recipient record and add the information you want.

6. From the list that appears, highlight Margaret as the relationship and click **Open**. Margaret's name appears in the **Relationship record** field on the New Joint Member or Card Recipient screen.

7. Mark the **Card/Guest Pass Recipient** checkbox.

Note: If the **Editable?** checkbox is unmarked, in the **Name** field, you can select an addressee from the Configuration table.

8. Mark the **Editable?** checkbox if you want to manually enter names in the **Name on card** field.

9. In the **Name on card** field, enter "Mrs. Margaret Lisbeth Murphy" as the name to appear on her card.

Note: If the name in the **Relationship record** field is not linked to the membership record, the **Relationship** field is enabled.

10. In the **Relationship** field, "Wife" automatically defaults from the Relationships tab of the constituent's record.

11. In the **Card expires** field, select "Same dates as membership" because you want Margaret's membership card to be valid throughout David's membership.

12. In the **Valid from** and **Valid to** fields, the same dates as the membership automatically default from the Membership tab and disable. If you select "Specific dates" in the **Card expires** field, the **Valid from** and **Valid to** dates enable.

13. In the **Type** field, select "Joint" to designate Margaret as a joint member.

14. In the **Number to print** field, enter "1".

Warning: The **Select from joint member's addresses** is available only if the cardholder is also a joint member. If the **Joint Member** checkbox is not marked, then the **Select from joint member's addresses** option is not available. In the **Type** field, if any option other than "Joint" is selected, the card recipient is considered only a relationship to the Primary Member. In that case, the address used to print if **Select from joint member's addresses** is chosen is the address listed for the relationship on the member's constituent record. If the relationship record does not have an address, then an address does not print on the card, no matter what is chosen for the **If no address is found** field on the Address Tab of *Mail* tasks.

15. To ensure Margaret's card is sent to her home, mark the **Select from primary member's addresses** option, which is the selected mailing address on David's record.

16. If you want to include a photo of the member, click the ellipsis in the **Photo ID** field to browse for the photo file on your computer. When you select a photo, "<image>" automatically defaults in the **Photo ID** field. If you have *Membership Scanning*, you can view this photo on the Membership Scanning page. For more information, see the *Membership Scanning Guide*.

    For the best optimization using photo IDs on the Membership Scanning page, we recommend you save your images no larger than 300 x 300 pixels. You can display larger images, but viewing the display fields may become more difficult. Photo file types must be saved as a .bmp, .gif, .jpg or .jpeg file.

17. To save the relationship information, click **Save and Close**. You return to the Other Members and Card Information screen. Margaret's name is added to the list.

Note: From the General Information tab of the membership category record, you can select to limit the amount of members per membership record. For more information, see "Membership Categories" on page 30.

18. Because Margaret is a joint member, enter "2" in the **Total number of members on this membership** field.

19. Click **OK**. You return to David's membership record.

20. To save the additional member information and exit the membership record, click **Save and Close** on the toolbar.

Membership and Gifts

When a constituent pays dues for a membership, you can create a gift record for the dues payment and link the gift record to the membership record. When you link a gift record to a membership, you record the dues payment. If a constituent makes a pledge to pay dues over a period of time, you can link the gift record for the pledge and the pledge payments to the membership record.

A constituent can pay dues for her own membership or any other membership. For example, a parent may pay for a child's membership to your organization. This is considered a gift of membership. However, it is not recorded on the recipient's membership record unless you click the **Gift of Membership** button and enter information about the donor of the gift. When a constituent gives a gift of membership, you can specify whether the donor or the recipient of the membership receives the renewal notices and benefits for the membership. Only individuals entered as constituents in your database can give a gift of membership.

▶ **Add a gift of membership**

Gifts of membership are memberships in which the primary cardholder is not the individual who pays the membership dues. For example, a constituent may decide to give a gift of membership to his wife for her birthday. This means the wife benefits from the membership, but is not responsible for the membership dues. Entering a gift of membership information is useful for record keeping purposes and helps you link the membership with the appropriate gift. This scenario explains how to add a gift of membership from the membership record. For more information about adding a gift of membership from the gift record, see the *Membership Gifts Guide*.

> *Scenario:* Michelle Taylor wants to give her granddaughter, Susan Marie Taylor, a gift of membership to become a Young Benefactor of your zoo's Young Explorers Program, for which dues are $750. Although Susan will be the primary member and receive most of the membership benefits, you want to make sure you specify that Michelle Taylor, the donor, receives all renewal notices for this membership. Enter the information pertaining to the gift of membership on Susan Taylor's membership record.

Note: You can also add a membership using the **New Membership** link on the Membership tab of a constituent record or by selecting **File**, **New, Membership** from the shell menu bar.

1. From the Memberships page, click **New Member**. The New Membership screen appears. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5.

2. In the **Constituent** field, click the binoculars to access the Open screen so you can search for Susan in your database. Once found and selected, Susan's name appears in the field. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide.*

Note: To ensure data entry consistency, we recommend you establish business rules to automatically generate ID numbers. For more information about automatically generating IDs, see "Generate IDs Rules" on page 18.

3. In the **Membership ID** field, enter "289954".

4. In the **Dues** field, enter the amount $750. Because you entered the dues amount in *Configuration* for the Young Maestros category, "Young Explorers" defaults automatically in the **Program** field and "Young Maestros" defaults automatically in the **Category** field.

For more information about setting up membership categories, see the Configuration chapter of the *Configuration & Security Guide*.

5. In the **Date joined** field, enter the date 06/20/2006.

6. In the **Expires** field, enter the date 06/20/2007 as the expiration date or click the calendar to select a date. If you established the default settings on the Membership Category screen in *Configuration,* you can tab down to the **Expires** field from the **Date Joined** field and the expiration date automatically defaults. For information about defining how the program calculates expiration dates, see the Configuration chapter of the *Configuration & Security Guide*.

Warning: If the **Renewal Notice Information** frame does not display on the Gift of Membership screen, information has already been entered in the **Send to** column in the **Renewal Notice Information When There Are Gifts of Membership** grid on the Renewal Information tab of the membership category record.

7. Click **Gift of Membership**. The Gift of Membership screen appears.

8. In the **Membership gift from** field, click the binoculars. The Open screen appears, so you can search your database for Michelle Taylor. When found and selected, her name appears in the **Membership gift from** field. For more information about locating a membership record, see "Access a Membership Record" on page 6.

9. The gift of membership is a present for Susan's good grades in school. In the **Special message** field enter "Congratulations. Keep up the good work! Love, Grandma".

Note: The **View Renewal Schedule** button in the **Renewal Notice Information** frame is enabled only if you established renewal schedules in *Configuration*. For information about establishing renewal schedules, see the Configuration chapter of the *Configuration & Security Guide*.

10. In the **Renewal Notice Information** frame, to enable and select the **Send renewal notices to** options, mark the **Override 'Send To' field(s) in renewal notice schedule** checkbox. Otherwise, information entered in the **Send to** column on the **Renewal Notice Information When There Are Gifts of Membership** grid on the Renewal Information tab (of the membership category record) is used to send renewal notices.

11. Beside **Send all renewal notices to**, leave **Donor** as the selected default. You want renewal notices to be sent to Michelle Taylor, the donor.

If your organization prefers to send the renewal notices to the person receiving the gift of membership, select **Primary Member**. If you prefer the renewal notice be sent to the donor and the primary member, select **Both**.

12. Click **OK.** You return to the membership record.

Note: If you click **Link to Gifts** without any information on the Gift of Membership screen, the member's name defaults in the **First name** and **Last/Org Name** fields on the Open screen. To add a gift of membership from the Open screen, overwrite the member's name in the **First name** and **Last/Org Name fields**. Click **Add New**. A screen appears similar to the Gift of Membership screen for you to enter the donor's name.

13. Click **Link to Gifts**. The Open screen appears.

14. To add a new gift for Susan's gift of membership, click **Add New**. The New Gift screen appears.

Note: If you want to change the information on the New Gift screen, press **TAB** on your keyboard to enable the fields.

The default gift information you select for the membership category record in *Configuration* defaults automatically on the New Gift screen. If you want to select another donor for your new gift record, click the binoculars in the **Constituent** field to search for another constituent. For this scenario, leave "Michelle Taylor" in the **Constituent** field.

15. To save the gift record, click **Save and Close**. The Amount to Apply to Membership screen appears.

16. Because $750 is the amount of Susan's dues, you want to apply the full amount to the membership record. Click **OK**. You return to the Membership tab.

17. To save the gift of membership information and exit the membership record, click **Save and Close** on the toolbar.

▶ **Add and link a gift record to a membership record**

Warning: You can link a gift only to a primary membership. Gifts cannot be linked to joint memberships because memberships are stored by the name of the primary member. Also, you cannot link a gift to a membership with the standing of Dropped.

If you enter membership information for a constituent, you need to add a gift record for the membership dues and link the gift record to the membership record.

> **Scenario:** Chad Patterson sends your environmental protection organization a check for $10,000. In his letter, he explains he wants $5,000 to go toward payment for his Individual/Lifetime membership dues. He wants the remaining $5,000 to go to the organization's Annual Fund. From Chad's membership record, create a new gift record for the donation. Then, link the gift to Chad's membership record to show it paid his dues for his Individual Lifetime membership.

1. From Chad Patterson's membership record, select the Membership tab. For information about opening a record, see "Open a membership record" on page 6.

Note: The **Link to Gifts** button says **View/Link Gifts** if gift information is linked to the membership record.

2. Click **Link to Gifts**. The Open screen appears.

Warning: You can add gift information only for individuals who have a constituent record in your database.

3. Click **Add New**. The New Gift screen appears.

4. In the **Constituent** field, leave the default "Chad Patterson".
5. Click **TAB** on your keyboard to enable the gift fields.
6. In the **Gift type** field, select "Cash".
7. In the **Gift date** field, enter the date 10/15/2006.
8. In the **Amount** field, enter the amount $10,000.
9. In the **Campaign** field, select "Membership Campaign".

10. In the **Fund** field, select "2006 Membership Fund".
11. In the **Appeal** field, select "Membership Mailing".

Note: For more information about adding gift information, see the Gift Record chapter of the *Gift Records Guide*.

12. Because of Chad's request to divide his donation between two funds, select the Split Gift tab.

13. In the first row of the grid, information defaults into the **Campaign**, **Fund**, **Appeal**, and **Amount** columns based on the selections you made on the Gift tab.

14. In the first row of the grid, in the **Amount** column, change the amount to $5,000 because this is how much of the gift goes toward the 2006 Membership Fund.

15. In the second row of the grid, in the **Campaign** column, select "Membership Campaign".

16. In the second row of the grid, in the **Fund** column, select "2006 Annual Fund".

17. In the second row of the grid, in the **Appeal** column, select "Membership Mailing".

18. In the second row of the grid, in the **Amount** column, enter the amount $5,000, because this is how much of the gift goes toward the 2006 Annual Fund.

19. Click **Save and Close**. The gift record is saved and the Amount to Apply to Membership screen appears.

Tip: It is not necessary to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

20. In the **Amount to apply to this transaction** field, enter the amount $5,000.

21. Click **OK**. You return to the Membership record.

22. Click **View/Linked Gifts**. The Linked Gifts for Membership transaction screen appears. The new gift information displays on the screen.

23. Click **Close**. You return to the Membership tab of the membership record.

24. To exit the membership record, click **Save and Close** on the toolbar.

▶ **Link an existing gift record to a membership record**

In *The Raiser's Edge*, you can link an existing gift record to a membership record. This is helpful if, for example, one of your constituents pays dues for a membership before he mails you an official membership request. Once you create a membership record for the constituent, you can link the gift record to the membership record. You can link more than one gift record to a membership transaction. This is helpful if the member decides to pay for his membership with a pledge or recurring gift.

> *Scenario:* During your membership drive last month, Scarlett Ray gave you a personal check for $10,000 for the Building Fund, but stipulated that $2,000 should be used to pay her dues to become a Patron of the Arts Program. She did not complete the membership application at the time, but mailed it to you this week. You entered the gift on Scarlett's constituent record. Now create a membership record for her and link the gift record to the membership record.

1. From the Memberships page, click **New Membership**. The New Membership screen appears. For information about accessing the Memberships page, see "Navigate in Membership" on page 5. For information about creating a new membership record, see "Add a membership record" on page 34.

Note: For more information about entering information in the fields on the Membership tab, see "Add a membership record" on page 34.

2. In the **Constituent** field, click the binoculars to access the Open screen so you can search for Scarlett in your database. Once found and selected, Scarlett's name appears in the field. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide.*

3. In the **Membership ID** field, enter "061476".

4. In the **Dues** field, enter $2,000.

5. In the **Program** field, select "Arts Program".

6. In the **Category** field, select "Patron".

7. In the **Date joined** field, enter the date 05/05/2006. Because you established a member expiration time on the Default Settings tab of the Patron category in *Configuration*, the date 05/05/2007 automatically defaults in the **Expires** field. For more information about creating membership categories, see the Configuration chapter of the *Configuration & Security Guide*.

8. Click **Link to Gifts**. The Open screen with Scarlett's list of gifts appears.

9. Highlight the gift for $10,000 donated to the Building Fund on 04/26/2006.

10. Click **Open**. The Amount to Apply to Membership screen appears.

11. Click the calculator on the **Amount to apply to this transaction** field to determine the portion of the gift you want to transfer to the membership. In this case, apply $2,000 of the gift to the membership dues.

12. To link the gift to the membership record, click **OK.** You return to Scarlett's membership record.

13. To save and close the linked information and exit the membership record, click **OK**.

‣ **Open and break a link between a gift and a membership record**

Sometimes it is necessary to break a link between a membership record and a gift. This may be necessary if you linked the wrong records. You may also need to break the link between records if, for example, you linked the membership to a pledge that has not been fulfilled.

1. From Kate Williams membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

2. Click **View/Link Gifts**. The Linked Gifts for this Membership transaction screen appears.

3. Highlight the gift for which you want to break the link, and click **Break Link** on the action bar. A warning message appears.
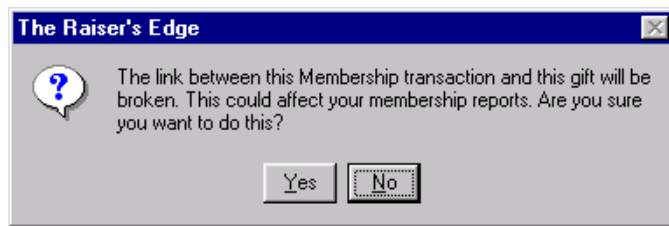
4. To break the link, click **Yes**. You return to the Linked Gifts for Membership transaction screen.
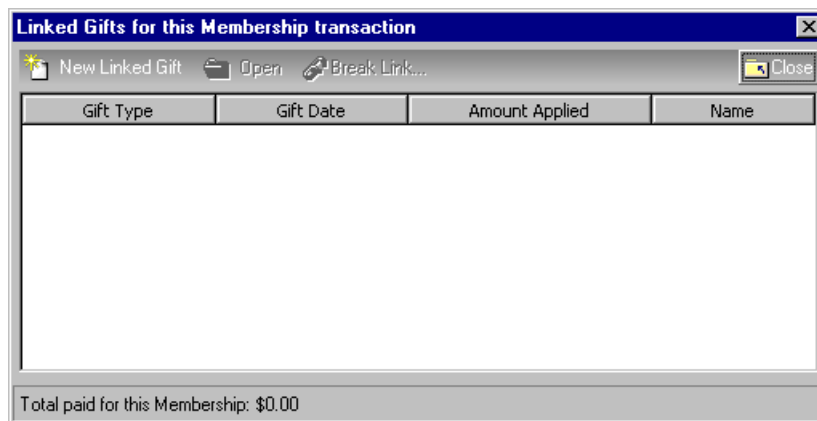
Warning: The gift types of Cash, Stock, Gift-in-Kind, Other, and pledge payments are included in the calculation of the **Paid** amount that displays next to the **View/Link Gifts** button.
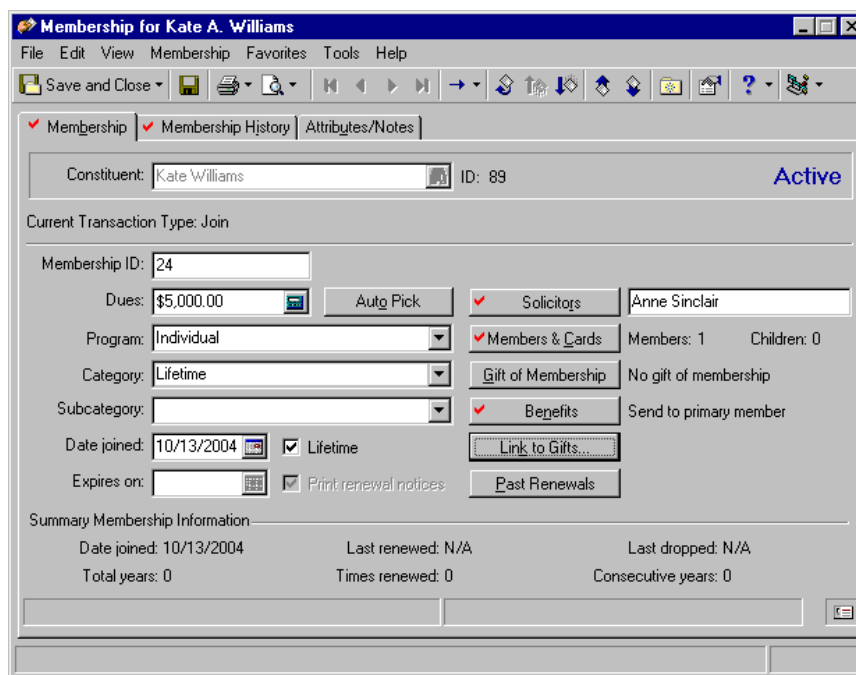
5. Click **Close**. You return to the Membership tab.

6. To save the changes and exit the membership record, click **Save and Close** on the toolbar.

Membership Benefits

Membership benefits are gifts your organization gives to constituents depending on their level of membership or the dues they pay. You can determine the membership benefits associated with each membership category in advance or you can enter this information from the membership record. Default benefits are set up in Membership Categories in *Configuration*. You can also link membership benefits to a gift for gifts of membership. Computing the benefits for gifts linked to a membership transaction is very important. Failure to do so may affect the accuracy of the information printed on your receipts. Membership benefits, which are linked to a gift, reduce the tax-deductible portion of that gift. For example, if a member makes a gift of $2,000 and the membership benefits are worth $1,500, only $500 of the donation is tax-deductible.

▶ **Add membership benefits information**

Membership benefits can be waived if the constituent wants to make a donation, but is not interested in receiving the membership benefits. This may be the case if you have two spouses holding the same type of membership. The husband may decide to waive his benefits, to avoid receiving duplicates of the items sent by your organization.

> *Scenario:* You added Dr. Alan Hayes as a member, but you did not assign any membership benefits to his record. Alan is a member of the Patron of the Arts Program. Patrons receive a $30 museum t-shirt, a $5 museum calendar, and a 10% museum gift shop discount, estimated at $60. Enter the membership benefits on Alan's membership record.

1. From Dr. Alan Hayes's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

Note: If you established your default membership benefits in *Configuration*, that information automatically defaults into the Benefits screen. For more information about establishing benefit tables, see the Configuration chapter of the *Configuration & Security Guide*.

2. Click **Benefits**. The Benefits screen appears.

Warning: If a membership record with benefits is linked to a gift record without benefits, the membership benefits default from the membership Benefits screen to the gift Benefits screen. However, if you edit the membership Benefits screen, you must manually make the same changes to the gift Benefits screen.

3. Do not mark the **Waive benefits** checkbox. If you mark this checkbox, you waive the benefits for the membership record, and the benefits grid disables.

4. In the first row of the **Benefit** column, select "T-shirt".

5. In the first row of the **Count** column, enter "1" for the number of T-shirts he should receive.

6. In the first row of the **Unit Cost** column, enter $30, the price of the T-shirt Alan should receive. You do not have to enter the "$", only the amount. The field is already formatted for monetary amounts.

Note: The final **Total** display in the middle right of the Benefits screen changes to reflect the sum of all **Total Benefit/Value** amounts entered on a membership record.

7. In the first row of the **Total Benefit/Value** column, the unit cost amount defaults automatically from the Default Benefits tab of *Configuration*. You do not have to enter the "$", only the amount. The field is already formatted for monetary amounts.

8. In the first row of the **Sent/Fulfilled** column, enter the date 02/25/2006 to track the date the t-shirt was mailed to Alan.

9. In the first row of the **Comments** column, enter "Size XL".

10. To enter a second benefit in the grid, press **TAB** on your keyboard.

11. Repeat the previous steps for each benefit Alan should receive: the $5 museum calendar, and the 10% museum gift shop discount, valued at $60.

> **Note**: If you click **Load Default Benefits**, benefits from the Membership Category table in *Configuration* default in the grid, overwriting any manual selections you enter.

12. In the **Notes** frame, enter "Dr. Hayes requested that we mail his benefit package to his business address."

13. To save the membership benefits information, click **OK**. You return to the membership record.

14. To save the new information and exit the membership record, click **Save and Close** on the toolbar.

▶ **Add membership benefits information to a gift record**

Note: You can add membership benefits information to a gift record only after the gift record is linked to a membership record.

Computing the benefits received for gifts linked to a membership transaction is very important. Not doing so may affect the accuracy of the information printed on your receipts. Membership benefits linked to a gift reduce the tax-deductible portion of that gift. For example, if a member donates a gift of $2,000 and the membership benefits are worth $1,500, only $500 of the donation is tax-deductible.

1. From a membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

2. Click **View/Link Gifts**. The Link Gifts for this Membership Transaction screen appears.

3. Highlight the linked gift record, and click **Open**. The selected gift record appears.

4. Click **Benefits**. The Benefits screen appears.

5. Click **Load From** and select the 03/10/2006 membership record from the menu that appears.

Benefits

Enter goods, services, or benefits received by the constituent.

	Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments
			$0.00	$0.00		

Load From...

03/10/2006 - Sustainer - Adopt an Animal

Membership Mailing

Total: $0.00

Notes:

☐ Include notes on receipt

[OK]   [Cancel]

6. The benefits from the membership Benefits screen automatically default to the gift Benefits screen.

Benefits

Enter goods, services, or benefits received by the constituent.

	Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments
	Free Admission	2	$11.00	$22.00		
	Parking Pass	1	$4.00	$4.00		
	50% off Guest Passes		$0.00	$0.00		

Load From...

Total: $42.00

Notes:

☐ Include notes on receipt

[OK]   [Cancel]

7. To save the benefits information on the gift record, click **OK**. A message appears, asking if you want to update the receipt amount because the total benefit value has changed.

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❓ The total benefit value has changed. Do you wish to update the receipt amount to reflect these changes?

The new receipt amount would be $8.00?

[Yes]   [No]   [Cancel]

8. To update the receipt amount, click **Yes**. You return to the Gift tab of the gift record.

9. To save the changes and close the gift record, click **Save and Close** on the gift record. You return to the Link Gifts for this Membership transaction screen.

10. To return to the Membership tab, click **Close**.

11. To save the changes and exit the membership record, click **Save and Close** on the toolbar.

Membership Renewal Notice Information

Membership renewal notices serve as a reminder to constituents that a membership is about to expire. You can establish the frequency with which members receive renewal notices in *Configuration*. When printing membership renewal notices, you can decide if you want to print a customized renewal notice or a standard renewal notice.

Once you enter a membership, you can use the membership renewal notice information to keep detailed information about renewal notices. You can keep detailed information about when you sent the renewal notices, which renewal letter was sent, and who received the renewal letter. This is especially helpful if your organization tracks and generates reports based on when members renew their memberships. For example, you can use this information to compare the renewal rates based on first or second renewal notices.

▶ **View membership renewal notice history**

Membership renewal notice information is generated when you create custom or standard renewal notices in *Mail* or when you print renewal notice information from a constituent record and the member renews his membership as a result of the notices.

1. From a membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

2. Click **Past Renewals**. The Renewal Notice History screen appears. You can view the date the renewal was sent, which renewal letter the constituent received, the addressee used in the renewal letter, and the address to which the renewal was sent.

3. Click **Close.** You return to the Membership tab.

4. To exit the membership record, click **Save and Close** on the toolbar.

▶ **View a renewal schedule for a membership**

Warning: If you have not established a renewal schedule in *Configuration*, the **View Renewal Schedule** button is disabled.

Renewal notice information is retrieved from the default renewal notice schedule you establish in *Configuration*. You can establish a membership renewal schedule for each membership category you define. You can also define membership renewal schedules for gifts of membership or regular memberships.

This procedure uses the information added in "Add a gift of membership" on page 47.

1. From a membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

2. Click **Gift of Membership**. The Gift of Membership screen appears.

3. Click **View Renewal Notice Schedule**. The Renewal Notice Schedule screen appears.

4. In the **Standard Renewal Notice Information** grid, you can view the renewal information pertaining to the gift of membership.

5. To close the Renewal Notice Schedule screen, click **OK**. You return to the Gift of Membership screen.

It is important to remember when you mark the **Override 'Send To' field(s) is renewal notice schedule** checkbox, the renewal notice is sent to the option you select on the Gift of Membership screen. Using this example, the renewal notice is sent to Michelle Taylor, the donor.

If you do not mark this checkbox, the renewal notice is sent according to the information already entered in the **Send to** column in the **Renewal Notice Information When There Are Gifts of Membership** grid on the Renewal Information tab of the membership category record in *Configuration*.

If renewal notice information for gifts of membership are not defined on the Renewal Information tab, renewal notice information is sent according to the information already entered in the **Regular Renewal Notice Information** grid on the same tab. For more information about the Renewal Information tab in membership categories, see the Configuration chapter in the *Configuration & Security Guide*.

6. Click **OK**. You return to the Membership tab.

7. To exit the membership record, click **Save and Close** on the toolbar.

Summary Membership Information

The **Summary Membership Information** frame of a membership record provides a view-only summary of the most important information found in a membership record. This information includes the date the member joined, how many years he has been a member, date of the last renewal, and how many times the membership has been renewed.

Comments and Reasons on a Membership Record

In addition to viewing the information already entered on the record, you can add or change the comments that appear in the reason and comment sections of the membership record. Although the membership transaction reason information defaults to the type of membership action you are performing, you can still make changes to the information that displays in the **Reason** field.

▶ **Add reasons and comments to a membership record.**

> ***Scenario:*** Susan Marie Taylor, a member of your zoo's Young Explorers program, is also interested in possibly supporting the Adopt an Animal progam because of her interest in lions and tigers. Make this notation in Susan's membership record. This scenario uses the membership record added in "Add a gift of membership" on page 47.

1. From Susan Taylor's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

2. Click the **Reason/Comment** button in the lower right corner.

3. The Reason and Comment screen appears.

Note: For data entry consistency and accuracy, we recommend creating table entries for your membership reasons. For more information about how to create table entries, see the Configuration chapter of the *Configuration & Security Guide*.
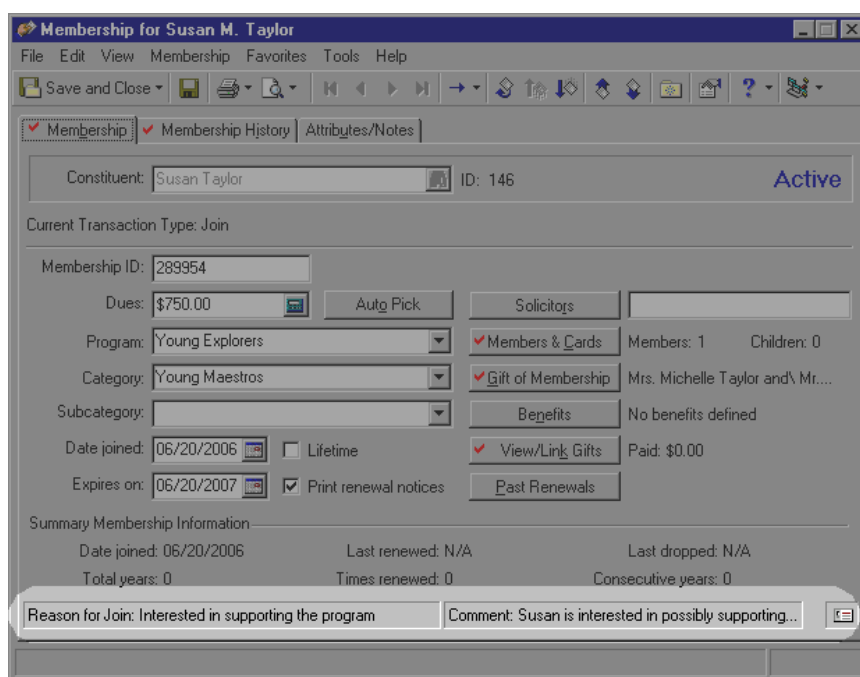
4. In the **Reason** field, select "Interested in supporting the program". If you have appropriate security rights, you can enter the information directly in the **Reason** field. For more information about security, see the Security chapter of the *Configuration & Security Guide*.

5. In the **Comment(s)** field, enter "Susan is interested in possibly supporting the Adopt an Animal program because of her interest in lions and tigers."

6. To save the reason and comments, click **OK**. You return to the Membership tab. The information from the Reason and Comments screen is visible at the bottom of the Membership tab.

7. To save the changes and exit the membership record, click **Save and Close** on the toolbar.

Historic Membership Information

> **Note**: The appearance of the information in the grid depends on the options selected for the membership legend on the Color tab in User Options. For more information about legends, see the User Options chapter of the *Program Basics Guide*.

The History tab of a membership record displays historic information about all transactions ever performed on a membership record. For example, this tab can display the date a member joined, membership level, membership renewals, and any upgrades or downgrades in membership. The **Membership History Items** grid displays membership information, including the date and type of the transaction, the membership program, category, and subcategory, and the solicitor entered in the membership transaction. Most of the information on the grid is retrieved from individual membership transactions and displayed for viewing purposes only. The summary information displayed in the **Membership Details for Selected Item** frame displays information pertaining to the membership transaction highlighted in the grid.

▶ **Open a historic membership record**

You can only edit information on the most recent membership transaction, but you can open all membership transactions displayed in the grid. Opening a membership transaction gives you access to the record for that transaction, but the information displayed in the grid is for viewing purposes only. To edit any of the information, you must return to that membership transaction.

1. From a membership record, select the Membership History tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.
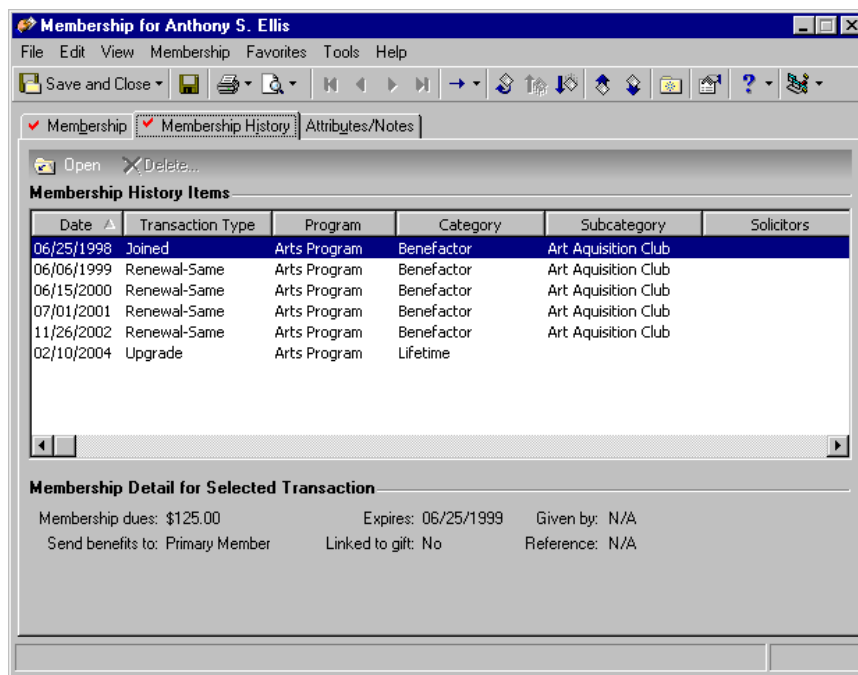
2. Highlight the transaction you want to view, and click **Open** on the action bar. The screen for the selected membership transaction appears.

3. Click **Close**. You return to the Membership History tab.

4. To exit the membership record, click **Save and Close** on the toolbar.

Delete Historic Information

The **Delete** button on the action bar of the Membership History tab is enabled only in certain conditions. For example, a membership transaction with the status of Joined cannot be deleted unless it is the current membership transaction. If you delete a membership transaction using this example, you receive the following message.
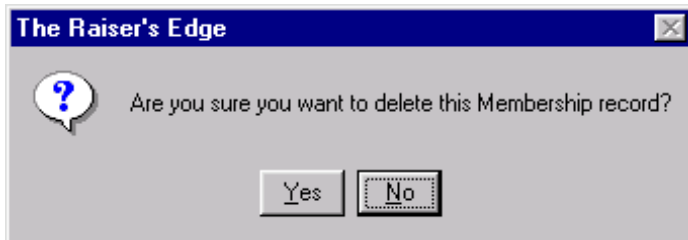
Note: You can always delete the most recent membership transaction.

If you click **Yes**, the entire membership record is permanently deleted because the Joined membership is the current membership transaction. To save the membership record, click **No**.

Membership transactions that are not the most recent transaction can be deleted in certain conditions. Examples of these conditions are in the tables below.

Transaction Type	Membership Category Example	Ability to Delete
Joined	Bronze	No
Renew-Same	Bronze	Yes
Renew-Same	Bronze	Yes
Renew-Same	Bronze	Yes

Note: Tables in this section are in the same order as they appear on the Membership History tab of a membership record in **The Raiser's Edge**. In these examples, the fist row of information is the oldest membership transaction. The fourth row is the most current.

For example, the Renew-Same membership transaction in the fourth row is the most recent transaction you can always delete. You can delete the previous two transactions because they are the same type and category. You can delete the Joined transaction only when the Joined transaction is the current membership transaction.

Transaction Type	Membership Category Example	Ability to Delete
Joined	Bronze	No
Renew-Upgrade	Silver	No
Renew-Same	Silver	Yes
Renew-Same	Silver	Yes

For example, the Renew-Same membership transaction in the fourth row is the most recent transaction you can always delete. The previous transaction is the same type and category and can be deleted. You cannot delete the Renew-Upgrade transaction because a Renew-Upgrade or Renew-Downgrade must have a different membership category than the preceding membership category in order to enable **Delete**. You can delete the Joined transaction only if the Joined transaction is the current membership transaction.

| Transaction Type	Membership Category Example	Ability to Delete
Joined	Bronze	No
Renew-Same	Bronze	Yes
Upgrade	Silver	No
Renew-Same	Silver	Yes

Note: Tables in this section are in the same order as they appear on the Membership History tab of a membership record in *The Raiser's Edge*. In these examples, the fist row of information is the oldest membership transaction. The fourth row is the most current.

For example, the Renew-Same membership transaction in the fourth row is the most recent transaction you can always delete. The Upgrade transaction cannot be deleted because an Upgrade or a Downgrade must have a different membership category than the preceding membership category in order to enable **Delete**. You can delete the Renew-Same transaction because it includes a different membership category. You can delete the Joined transaction only if the Joined transaction is the current membership transaction.

Transaction Type	Membership Category Example	Ability to Delete
Joined	Bronze	No
Renew-Same	Bronze	Yes
Downgrade	Silver	No
Renew-Same	Silver	Yes

For example, the Renew-Same membership transaction in the fourth row is the most recent transaction you can always delete. The Upgrade transaction cannot be deleted because a Downgrade or an Upgrade must have a different membership category than the preceding membership category in order to enable **Delete**. You can delete the Renew-Same transaction because it includes a different membership category. You can delete the Joined transaction only if the Joined transaction is the current membership transaction

Transaction Type	Membership Category Example	Ability to Delete
Joined	Bronze	No
Renew-Upgrade	Silver	Yes
Renew-Upgrade	Gold	No
Renew-Same	Gold	Yes

For example, the Renew-Same membership transaction in the fourth row is the most recent transaction you can always delete. The Renew-Upgrade (Gold) transaction cannot be deleted because a Renew-Upgrade or Renew-Downgrade must have a different membership category than the preceding membership category in order to enable **Delete**. You can delete the Renew-Upgrade (Silver) transaction because it includes a different membership category. You can delete the Joined transaction only if the Joined transaction is the current membership transaction.

Transaction Type	Membership Category Example	Ability to Delete
Joined	Bronze	No
Drop	Bronze	No
Rejoin-Same	Bronze	No
Renew-Same	Bronze	Yes

Note: Tables in this section are in the same order as they appear on the Membership History tab of a membership record in *The Raiser's Edge*. In these examples, the fist row of information is the oldest membership transaction. The fourth row is the most current.

For example, the Renew-Same membership transaction in the fourth row is the most recent transaction you can always delete. The Rejoin-Same transaction cannot be deleted because a Rejoin-Same must follow a Drop transaction to enable **Delete**. You cannot delete the Drop transaction because a Rejoin-Same transaction type cannot follow a Joined transaction. You can delete the Joined transaction only if the Joined transaction is the current membership transaction.

‣ **Delete a historic membership record**

Before deleting any historic information, we recommend you make a backup of your database or run a report, in case you make a mistake or need to refer to the deleted information.

1. From a membership record, select the Membership History tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.
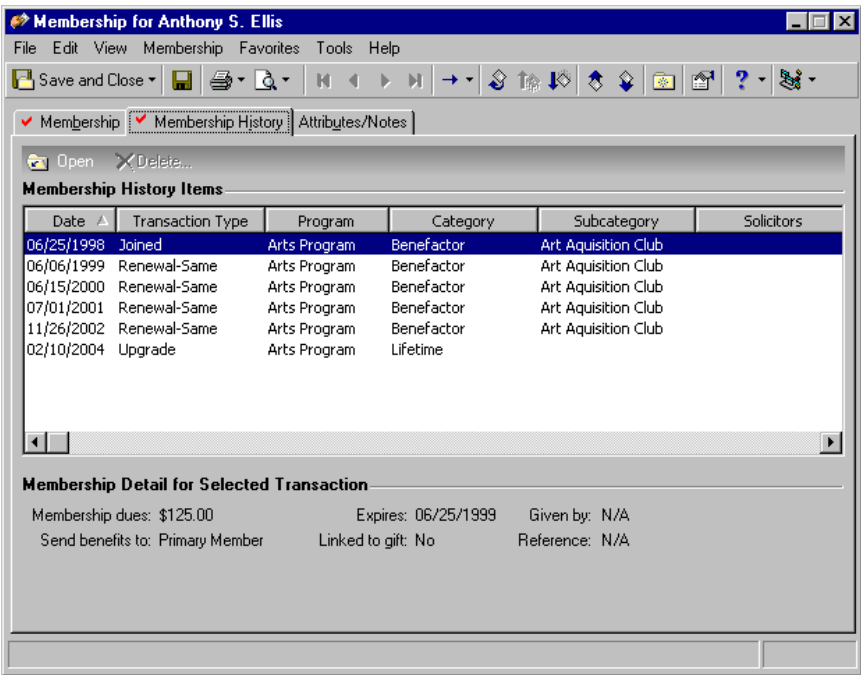
2. Highlight the membership transaction you want to delete, and click **Delete** on the action bar. A warning message appears.

3. To delete the membership transaction, click **Yes**. You return to the Membership History tab.
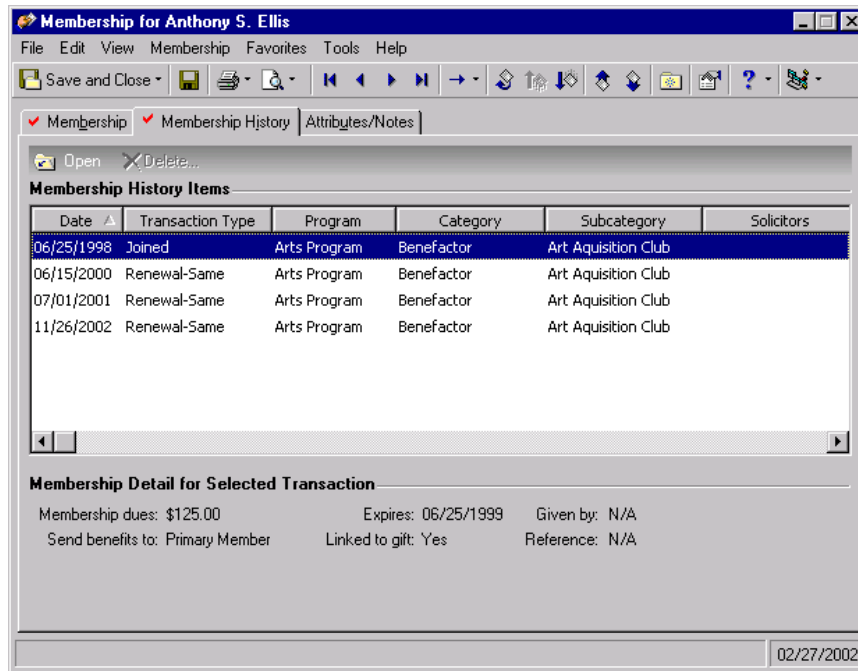
4. To save the changes and exit the membership record, click **Save and Close** on the toolbar.

Membership Attributes and Notes

Attributes are categories of information you can use to store characteristics specific to a record. Attributes are helpful because they allow you to customize your membership records and track miscellaneous information not stored anywhere else in *The Raiser's Edge*.

For example, you can track if a member should receive a holiday gift by adding a Holiday Gift? attribute **Category**, and entering Yes or No in the **Description** column. You can define attribute categories using the **Attributes** link in *Configuration*.

On the Attributes/Notes tab of the membership record, you can store additional information about a member or the membership. For example, if a member also volunteers many hours at your organization, you may prefer to give her a special gift. In the **Notes** frame, you can enter "Because Mrs. Smith spends so much time volunteering at our organization, we should give a $50 gift certificate and a cheese basket to her for the holidays." Membership notes and attributes are general in nature and not related to any specific membership transaction. You can use the attributes filter to view specific attributes on the grid.

‣ **Add a membership attribute**

Scenario: In conversations with Margaret Murphy, you discover she and her husband are very interested in Asian art. You want to make a note of this special interest on David Murphy's membership record so when you have a membership drive for the Friends of the Asian Arts Program, you can contact the Murphys. Add a membership attribute on David's membership record. This procedure uses the membership record was added in the scenario "Add a membership record" on page 34.

1. From David Murphy's membership record, select the Attributes/Notes tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.
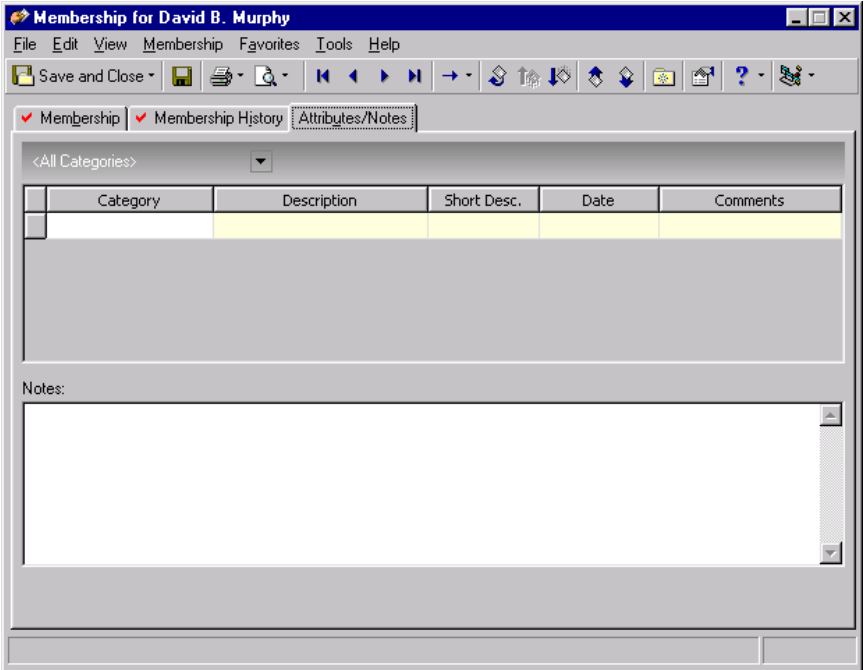
2. In the first row of the **Category** column, select "Exhibit Interest".

Note: We recommend you set up membership attributes in advance. If any of the attributes use a table, you should also set up the table in advance. Setting up tables in advance reduces data entry time and ensures consistency. For more information about setting up attributes or tables, see the Configuration chapter of the *Configuration & Security Guide*.

3. In the first row of the **Description** column, select "Asian Art".

4. In the first row of the **Date** column, enter the date 05/30/2006. You can click the calendar to select a date.

5. In the first row of the **Comments** column, enter "Contact for new program".

6. In the **Notes** frame, enter "Candidates for Friends of Asian Art Program".

7. To save the changes and exit the membership record, click **Save and Close** on the toolbar.

Membership Transactions

"Membership transaction" is the term used to describe the individual membership activities comprising a membership record. The activities can include adding, renewing, rejoining, upgrading, downgrading, and dropping a membership. You can also delete a membership. You can perform all these activities from the Memberships page or from the Membership tab of a constituent record.

Renew a Membership

You can renew memberships for constituents whose memberships have lapsed or are no longer active. Renewing a membership keeps the membership in an active standing. You cannot renew a membership that has been dropped. Dropped memberships must be rejoined. At the time you renew a membership, you can also upgrade or downgrade the membership, or keep the membership the same.

▸ **Renew a membership**

During the renewal process, you can also upgrade or downgrade a membership. When you perform a renewal/upgrade or renewal/downgrade, the member renews the membership for an additional membership year at a higher or lower level than the original membership.

> **Scenario:** Inman's Industrial Supply is a Corporate Member in your organization's Business Level Program. The company's membership expired months ago and the company's contact called on 03/08/2006 to renew it at the same membership level. Renew the membership for Inman's Industrial Supply.

1. From Inman's Industrial Supply's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

Note: You can also renew a membership using the **Renew** link on the Membership tab of a constituent record.

2. On the toolbar, click **Renew**. A message appears, informing you of how long the membership record has been lapsed.

3. Click **OK**. The Renew Membership screen appears.

4. In the **This renewal is a(n)** field, mark **Same** because Inman's Industrial Supply is continuing the same level of membership.

5. In the **Renewed on** field, enter the date 03/08/2006. You can also click the calendar to select a date.

Note: The **Expires** date fills in automatically when you enter the **Renewed on** date if a default membership term is established in *Configuration*. The program calculates the expiration date using the expiration defaults entered in Membership Categories. For more information about expiration defaults, see the Configuration chapter of the *Configuration & Security Guide*.

6. In the **Expires** field, enter the date 03/08/2007 or click the calendar to select a date.

7. Mark the **Print renewal notices** checkbox so you can print renewal notices in *Mail* to alert Inman's Industrial Supply that their membership is close to expiring.

8. To save the renewal, click **OK**. You return to the membership record.

9. To save the new information and exit the membership record, click **Save and Close** on the toolbar.

Rejoin a Membership

When you rejoin a membership, you reinstate a dropped member to active status. When you rejoin a dropped membership, you maintain a record of all previous membership transactions.

Warning: You can only rejoin a membership that has been dropped.

▶ **Rejoin a membership**

> ***Scenario:*** Paul Frantz was an active Patron of the Historic Homes club of your museum's Arts Program. When his membership expired, he forgot to renew the membership and was consequently dropped after the designated amount of time. Mr. Frantz now wants to be reinstated to an active membership status.

1. From Paul Frantz's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

Note: You can also rejoin a membership using the **Rejoin** link on the Membership tab of a constituent record.

2. On the toolbar, click **Rejoin**. The Rejoin Membership screen appears.

3. In the **This rejoin is a(n)** field, mark **Same**, because the membership level is not changing.

4. In the **Dues** field, enter the amount $2,000. You can click the calculator to enter the amount.

5. Leave the default entries in the **Program**, **Category**, and **Subcategory** fields. These default from the original membership record.

6. In the **Rejoined on** field, enter the date 04/21/2006. You can click the calendar to select a date.

Note: The **Expires** date appears automatically when you enter the **Renewed on** date, if a default membership term is established in *Configuration*. The program calculates the expiration date using the expiration defaults entered in Membership Categories. For more information about expiration defaults, see the Configuration chapter of the *Configuration & Security Guide*.

7. In the **Expires** field, enter the date 04/21/2007 or use the calendar to select a date.

8. Mark the **Print renewal notices** checkbox, so you can print renewal notices using *Mail* to alert Paul when his membership is close to expiring.

9. To save the rejoined membership, click **OK**. You return to the membership record.

10. To save the new information and exit the membership record, click **Save and Close** on the toolbar.

Upgrade a Membership

Note: You can upgrade a membership using the **Upgrade** link on the Membership tab of a constituent record. You cannot upgrade a membership through an import.

Upgrading a constituent's membership transfers a current membership to a higher membership level. For example, a constituent joins at the Individual level and later decides to upgrade to a Family membership. With the upgrade option, you can change the level of the membership without having to drop the current membership and create a new one. This is helpful if you want to upgrade the membership, but still keep a record, for historic purposes, of the original membership transactions for each record.

▶ **Upgrade a membership**

With *The Raiser's Edge*, you can upgrade a membership during the membership cycle. Upgrading a membership during the membership cycle means that a member is choosing to pay higher dues to enter a higher level of membership during the membership cycle year. Customarily, when upgrading during the cycle, the expiration date does not change unless the new membership category has a different expiration date than the one in which the member was previously entered.

> *Scenario:* Mark Adamson is a Contributor to your zoo's Adopt an Animal Program. He is now interested in upgrading to Sustainer, the highest level of membership for the Adopt an Animal program, with dues of $2,000 per membership year. Upgrade Mark's membership. Be sure to note that Mark's cousin recently became a trainer at the zoo and her involvement accounts for his new level of interest.

1. From Mark Adamson's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

Note: If you realize you made a mistake when entering the original membership record and need to upgrade a membership for the current membership transaction, select **Upgrade** in the **Current Transaction Type** field. This scenario explains how to upgrade a membership for a new membership transaction during the membership cycle.

2. On the toolbar, click **Upgrade**. The Membership Upgrade screen appears.

3. In the **Dues** field, enter the amount $2,000 for the new dues. You can click the calculator to enter the amount.

Note: You can click the **Auto Pick** button to display a list of available program/category combinations, based on the dues amount entered. This button is enabled only if you established membership categories in *Configuration*.

4. Click **Auto Pick**. The Select Program/Category screen appears.
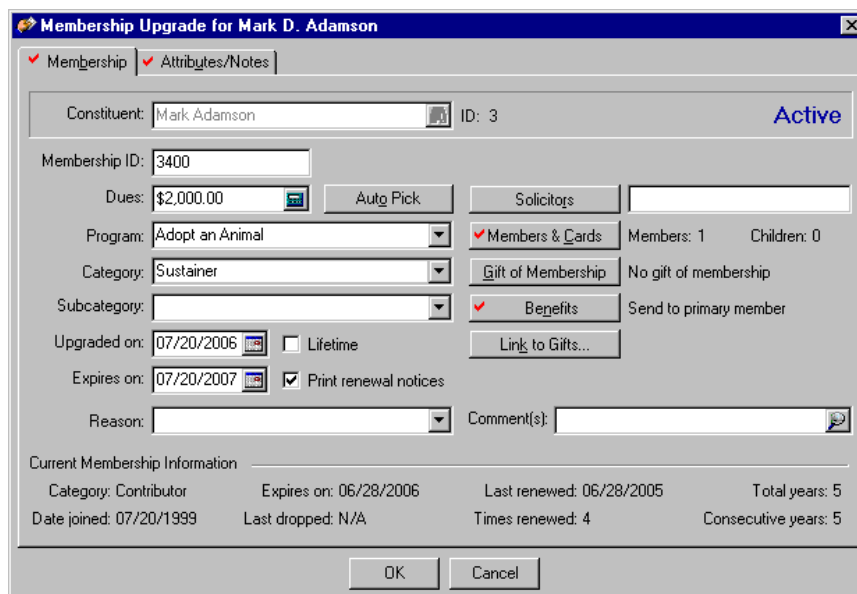
Select Program/Category

You have entered a Dues amount that falls into these Categories. Selecting a row in this grid will default the Program and Category for you.

Program	Category
Education Program	Sustainer
Arts Program	Patron
Adopt an Animal	Patron
Adopt an Animal	Sustainer

OK   Cancel

5. Highlight "Adopt an Animal/Sustainer" and click **OK**. You return to the Upgrade screen.

Membership Upgrade for Mark D. Adamson

✔ Membership   ✔ Attributes/Notes

Constituent: Mark Adamson   ID: 3   Active

Membership ID: 3400

Dues: $2,000.00   Auto Pick   Solicitors

Program: Adopt an Animal   ✔Members & Cards   Members: 1   Children: 0

Category: Sustainer   Gift of Membership   No gift of membership

Subcategory: ✔   Benefits   Send to primary member

Upgraded on: 07/20/2006   ☐ Lifetime   Link to Gifts...

Expires on: 07/20/2007   ☑ Print renewal notices

Reason: Comment(s):
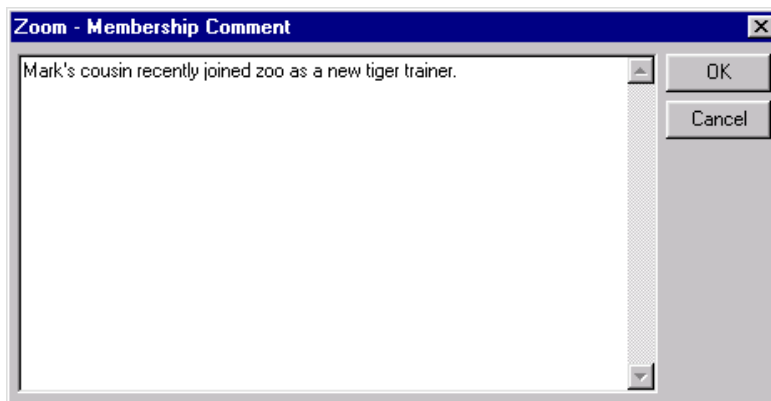
Current Membership Information

Category: Contributor   Expires on: 06/28/2006   Last renewed: 06/28/2005   Total years: 5
Date joined: 07/20/1999   Last dropped: N/A   Times renewed: 4   Consecutive years: 5

OK   Cancel
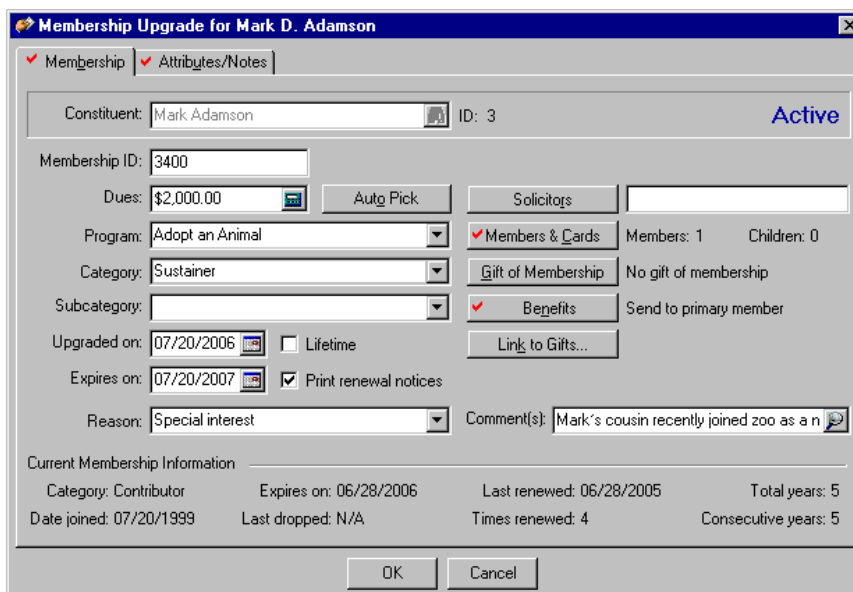
6. In the **Upgraded on** field, enter the date 07/20/2006. You can also use the calendar to select a date.

7. The membership cycle for this type of membership is 1 year, the same as Mark's previous membership category. In the **Expires** field, enter the date 07/20/2007 or click the calendar to select a date.

8. To alert Mark when his membership is close to expiring, mark the **Print renewal notices** checkbox. For more information about renewal notices, see "Print membership renewal notices" on page 112.

9. In the **Reason** field, enter "Special Interest".

10. In the **Comment(s)** field, click the zoom button. The Zoom-Membership Comment screen appears. Enter "Mark's cousin recently joined zoo as a new tiger trainer."

11. Click **OK**. You return to the Upgrade screen again.

12. Click **OK**. You return to the Membership tab.

13. To save the new information and exit the membership record, click **Save and Close** on the toolbar.

Downgrade a Membership

Downgrading a constituent's membership transfers a current membership to a lower membership level. For example, a constituent joins at the Contributor level and later goes back to school, meriting a downgrade to a Student membership. This transaction type is helpful if you want to downgrade the membership, but keep a record for historic purposes of the original membership transaction for each record.

▶ **Downgrade a membership**

You can downgrade a membership during a cycle; for example, a member wants to maintain his membership, but decides to pay lower dues. A member with a Family membership may want to downgrade to an individual membership when his children go off to school. Customarily, during a downgrade cycle, the expiration date does not change, unless the new membership category has a different duration than the previous membership.

Scenario: Nicholas Vincent holds a family membership with your environmental organization. His children, Noel and Gaston, are away at school and do not currently use the benefits of the membership. Nicholas wants to maintain his membership as active, but does not want to continue paying dues at the Family membership level. Downgrade Nicholas' membership to the Individual membership level, which has dues of $25. Also note on his record that he downgraded his membership because his children are away at school.

Note: You can downgrade a membership using the **Downgrade** link on the Membership tab of a constituent record. You cannot downgrade a membership through an import.

1. From Nicholas Vincent's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

2. Click **Downgrade** on the toolbar. From Membership tab. The Membership Downgrade for screen appears.

3. In the **Dues** field, enter the amount $25 for the new membership level. You can click the calculator to enter the amount.

4. In the **Category** field, enter "Individual".

5. In the **Downgraded on** field, enter the date 01/05/2006. You can also click the calendar to select a date.

Note: You need to enter a new expiration date only if the new membership category has a different length of membership cycle.

6. In the **Expires** field, enter the date 01/05/2007. You can use the calendar to select a date.

7. Mark the **Print renewal notices** checkbox, so you can print renewal notices in *Mail* to alert Nicholas when his membership is close to expiring. For more information about printing renewal notices, see "Print membership renewal notices" on page 112.

8. In the **Comments** field, enter "Mr. Vincent wanted to downgrade his membership level because his children are away at school and not able to take advantage of the membership benefits."

   For all other fields, leave the default information from the original membership record.

9. To save the downgrade, click **OK**. You return to the Membership tab.

10. To save the new information and exit the membership record, click **Save and Close** on the toolbar.

Drop a Membership

You can drop a member regardless of the membership standing. Dropping a membership is useful if you want to keep a record of a constituent's past membership activity, but you no longer want the membership to be active. The standing of active members changes to lapsed if they do not renew their membership before the deadline you establish in *Configuration*. From *Configuration*, you can also define the length of a membership and determine when members receive renewal notices. In addition, you can also establish when lapsed members (members who have not renewed their membership by the expiration date) are dropped. **The Raiser's Edge** lets you drop selected members or globally drop a group of members. For more information about globally dropping members, see "Drop lapsed members" on page 106.

▶ **Drop a membership**

> **Scenario:** Susan Marie Taylor is a young benefactor for your zoo's Young Explorers Program. Her parents decided to move to another state and she wants to drop her membership. She wants the change in her membership status to be effective as of September 14, 2006. Drop Susan's membership. This scenario uses the membership record added in "Add a gift of membership" on page 47.

1. From Susan Taylor's membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

Note: You can also drop a membership using the **Drop** link on the Membership tab of a constituent record.

2. On the toolbar, click **Drop**. The Drop Membership for screen appears.

3. In the **Date dropped** field, enter the date 09/14/2006. You can click the calendar to select a date.

4. In the **Reason** field, select "Moved". For more information about setting up tables for this field, see the Configuration chapter of the *Configuration & Security Guide*.

5. In the **Comments** frame, enter "Her parents are relocating out of state."

6. To save this information, click **OK.** You return to the Membership tab.

7. To save all changes and exit the membership record, click **Save and Close** on the toolbar.

Delete a Membership

Deleting a membership record permanently removes the membership from the constituent's record and leaves no record of the membership. You should delete records with extreme caution. Delete a membership record when you want to remove the member and the membership record from the database entirely. If the membership has lapsed, you may want to consider dropping the membership instead of deleting it. If you delete a membership record, no historic membership information remains. Before you delete any membership records, we recommend you back up your database, in case you make a mistake or need the information to create the record again.

▸ **Delete a membership record**

Note: You can also delete a membership using the **Delete** link on the Membership tab of a constituent record.

1. From a membership record, select the Membership tab. For more information about accessing the Memberships page, see "Navigate in Membership" on page 5. For more information about opening a membership record, see "Open a membership record" on page 6.

2. From the menu bar, select **File**, **Delete**. A warning message appears.

3. To permanently delete the entire membership record, click **Yes**. If you decide not to delete the membership record, click **No** to return to the Membership tab.

   The membership record is deleted and you return to the Memberships page.

Global Membership Transactions

In *The Raiser's Edge*, you can perform global functions that may affect all your membership records, and also globally drop lapsed members or globally add membership information to a group of records. Because these processes can affect all records in your database, we recommend you back up your database before globally adding or dropping members or globally adding any membership information to records.

Globally Drop Lapsed Members

The **Drop Lapsed Members** link in *Administration* changes the status of a group of lapsed memberships from "Lapsed" to "Dropped" in a few simple steps. You can drop memberships based on the membership expiration date and the **Drop this membership after being lapsed for** option set for each membership category in *Configuration*.

> **Note**: For information about establishing membership categories, see the Membership Categories section in the Configuration chapter of the *Configuration & Security Guide*.

For example, in the **Membership Categories** link of *Configuration*, you set the Silver membership category to expire in one year You tell the program to drop memberships two months after the expiration date. Today is June 14, 2006, and Linda Kennedy became a Silver member on June 14, 2005. If you run **Drop Lapsed Members** today, using the date on or before June 15, 2006, Linda is not dropped. She has not yet been lapsed for the two months, as required based on your settings in *Configuration*.

You cannot globally drop a lifetime membership. You must drop lifetime memberships individually from the constituent record.

▸ **Drop lapsed members**

Scenario: Your organization plans to generate a number of reports to present to its board members, and you do not want lapsed members included. Because dropped members are not included in the reports, you decide it is best to change the status of all constituents who have lapsed as of this calendar year to "Dropped."

> **Warning**: Before you globally drop lapsed members in *The Raiser's Edge*, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
2. Click **Drop Lapsed Members**. The Drop Lapsed Members screen appears, displaying the General tab.

3. Click **Include** and select the memberships you want to drop. You can select one of the following:
    *   **All records** - The program searches all membership records looking for those satisfying the drop criteria you establish.

- **Selected records** - To use this selection, you must have saved a query of the records you want to include in the drop procedure. The Open Query screen appears, so you can select the query containing the records you want dropped. You can use a constituent, individual, organization, or membership query.

- **One record** - This selection accesses the Open screen. You must locate the record you want dropped.

For this scenario, select **All records**.

4. In the **What expiration dates do you wish to consider?** frame, define your expiration date(s). In the **Date to use** field, click the drop-down arrow to access a list. If you select "Specific range", in the **Date to use** field, the **Start date** and **End date** fields display, and you must enter the date range.

For this scenario, select "This calendar yr".

5. In the **Indicate the drop information you wish to include** frame, select the information you want to appear on the membership record. You can select one of the following.

- If you select **Use constituent's expiration date** as the **Dropped date**, the dropped date on the constituent's membership is the same as the date the membership lapsed.

- If you want each constituent membership involved to have the same dropped date, select the **Use specified date** option and select the date you want the membership to show it was dropped. You must enter the date/date range information.

- In the **Reason** field, click on the drop-down arrow to access a list of reason options (Moved, Did not respond), explaining why the members were dropped. The reason then appears on the Membership History tab of the constituent membership record.

- In the **Comment** field, you can enter any comments you want to include in the constituent membership records regarding the dropped members. For example, "Job relocation".

For this scenario, select **Use specified date** and select "Today".

6. In the **Miscellaneous information** frame, you can mark any of the following checkboxes.

- **Create constituent query of dropped memberships** - This checkbox generates an output query of all constituent records dropped.

- **Create membership query of dropped memberships** - This checkbox generates an output query of all the membership records dropped.

- **Create control report** - This checkbox generates a report displaying constituent name, membership category, lapsed date, and dropped date of every member dropped. You can select to **Preview** the report on your computer screen or **Print** the report.

7. To move to the Filters tab, click **Next**.

8. On this tab, you can select the criteria you want the program to use to filter the records included in the drop. You can filter records based on **Categories**, **Programs**, or **Constituent Codes**.

9. In the **Include** column, you can select to include "All" categories, programs, and/or constituent codes, or "Selected". If you choose "Selected", you must identify the category, program, or constituent codes you want to include in the **Selected Filters** column.

    For this scenario, select "All" for each filter.

10. To drop the lapsed memberships, click **Drop Now**.

11. If on the General Tab, you marked the **Create constituent query of dropped memberships** checkbox or the **Create membership query of dropped memberships** checkbox, the Save Static Query screen appears (one for each checkbox).

12. Enter a **Query name** and **Description**. You can also mark the **Other users may execute this query** or **Other users may modify this query** checkboxes and allow others to work with this query.

13. Click **Save**.

14. A screen appears, tracking the write off process. When the process is complete, if you marked the **Create control report** checkbox in the **Miscellaneous information** frame on the General tab, the report appears.

15. To print the report, click the print icon on the toolbar.
16. To close the report, click the "X" in the upper right corner. You return to the Administration page.

Globally Add Membership Information to a Group of Records

> **Note**: If you set **Membership ID** as a required field in *Configuration*, no membership records can be globally added, because each Membership ID is unique. However, if you set the business rule to automatically generate membership IDs, then memberships can be globally added.

Using the **Globally Add Records** link, you can add the same membership information to a group of selected records. This transaction is especially useful if you already created a query to define the group of records you want to add membership information. For example, your organization recently held its annual membership drive and all board members agreed to sign up for the Patron membership category. You can now create a query with the names of all your board members and add the appropriate membership information to all records at one time. For more information about globally adding membership information to a group of records, see the Globally Add Records chapter of the *Global Add, Delete, & Change Records Guide*.

Print Membership Information

For each membership record you create, you can print membership cards and membership renewal notices. Membership cards display the identification information necessary for members to take advantage of the membership benefits they receive. Renewal notices help remind members that their membership expires at a specific time. Renewal notices can also contain the information necessary to renew a membership. You can print membership cards and renewal notices for one member at a time, or you can print numerous cards and renewal notices at the same time using the options available in *Mail*. The following procedures guide you through the process of printing one membership card or renewal notice from the membership record. For more information about how to print numerous membership cards and renewal notices at the same time, see the *Mail Guide*.
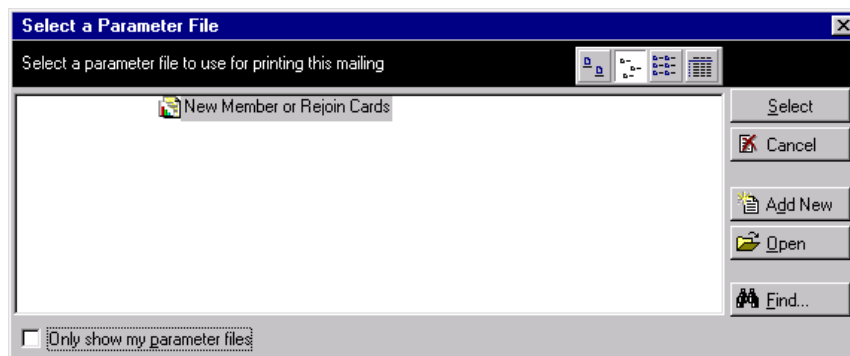
‣ **Print membership cards**

Membership cards provide detailed information about a specific membership record. They usually contain the name, number, and membership category of the member. Membership cards can also provide information about the number of additional members or guests covered by a primary membership. When printing membership cards, you can determine the recipient for which you want to print a card or you can print a card for all the recipients listed under a membership. You can also decide whether you want to print a customized membership card, a preprinted card, a blank card, or a 12-field card.

1. From a membership record, select **File**, **Print**. From the submenu, choose **Membership Cards**. For more information about opening a membership record, see "Open a membership record" on page 6.
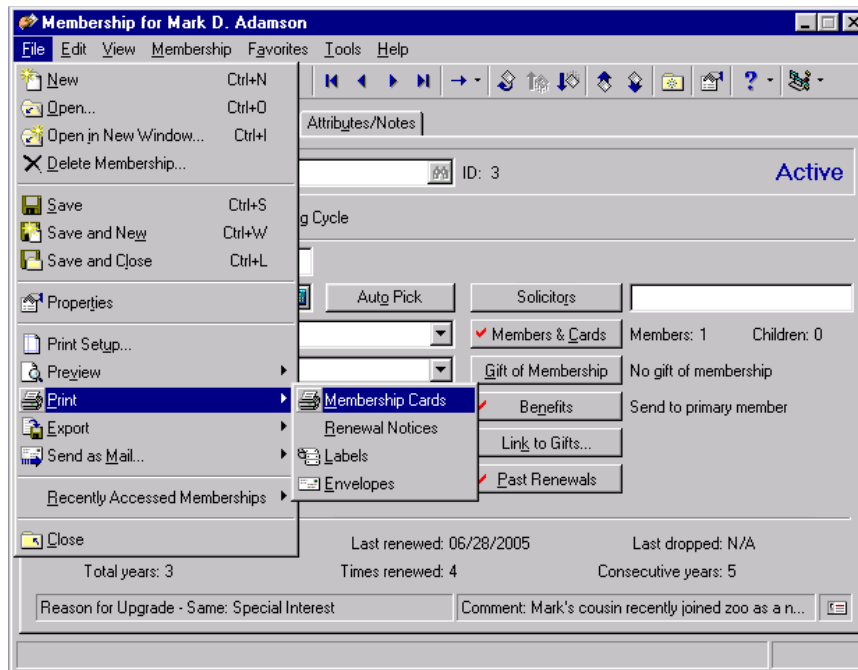
The Select a Parameter File screen appears.

2. Highlight the parameter file you want to use, and click **Select**.
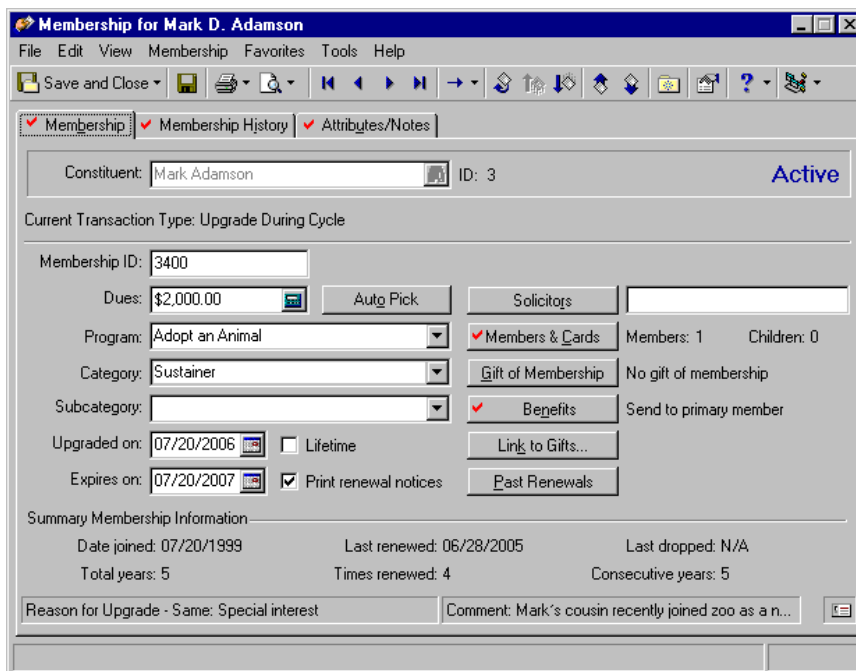
Note: If you have not established a parameter file for membership cards in *Mail*, click **Add New** to define a new parameter file. For more information about membership card parameter files, see the *Mail Guide*.

After the membership cards process completes, a message appears, asking if you would like to mark the status on the membership cards to "Printed".
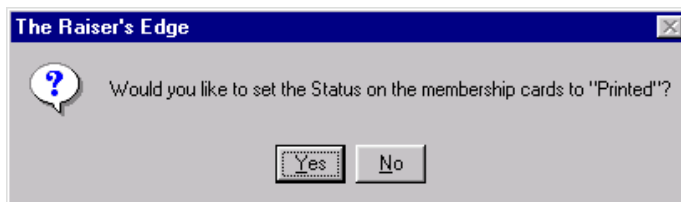
3. To change the **Status** field on the Primary Member's Card Information screen to "Printed", click **Yes**. You return to the Membership tab.

4. To save the changes and exit the record, click **Save and Close** on the toolbar.

▸ **Print membership renewal notices**

Membership renewal notices serve as reminders to constituents that a membership is about to expire. You can establish the frequency with which members receive renewal notices in *Configuration*. When printing membership renewal notices, you can decide if you want to print a customized renewal notice, a one-third page notice, a two-thirds page notice, or a full page renewal notice.

1. From the membership record, select **File**, **Print**. From the submenu, choose **Renewal Notices**. For more information about opening a membership record, see "Open a membership record" on page 6.
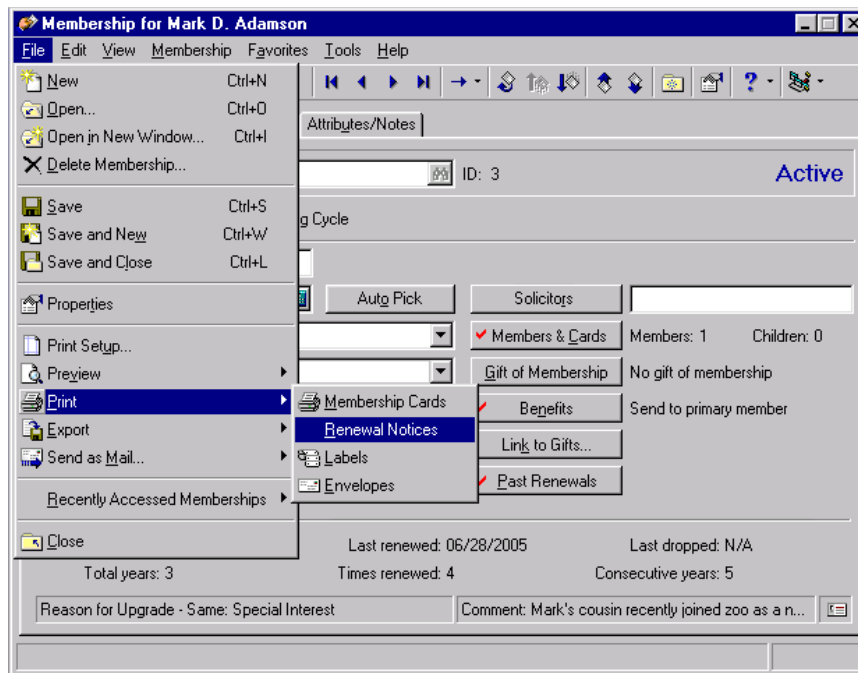
2. From the Select a Parameter File screen, highlight the parameter file you want to use, and click **Select**.
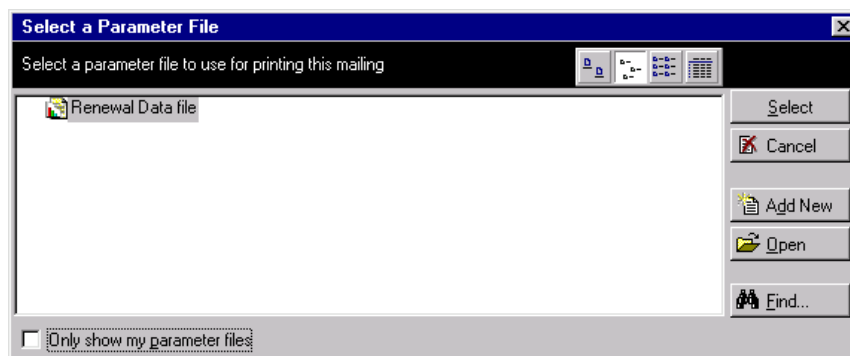
3. The Export screen appears.
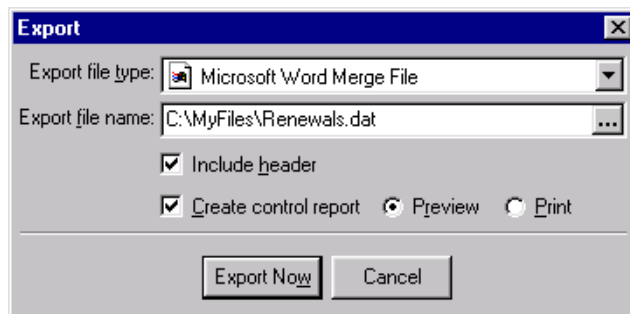
4. In the **Export file type** field, select the export type you need for your renewal letters.

5. In the **Export file name** field, assign a location to your data file and name it. For example, you can save this to C:\MyFiles and call it "Renewals.dat".

6. To include a header record in your data file, mark **Include header**.

7. To create a control report, mark **Create control report** and select to **Preview** or **Print** the report.

8. Click **Export Now**.

Note: If you have not established a parameter file for renewal notices in *Mail*, click **Add New** to define a new parameter file. For more information about renewal notice parameter files, see *Mail Guide*.

A message appears asking if you would like to record this mailing in each membership's renewal history.
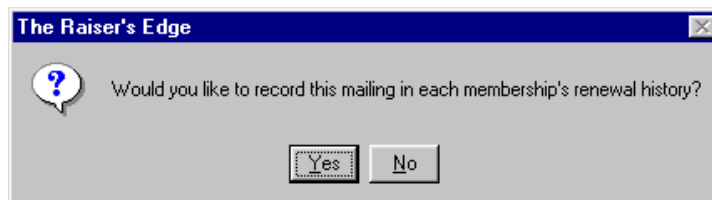
9. To record the mailing on the Renewal History Screen, click **Yes**. You return to the Membership tab.
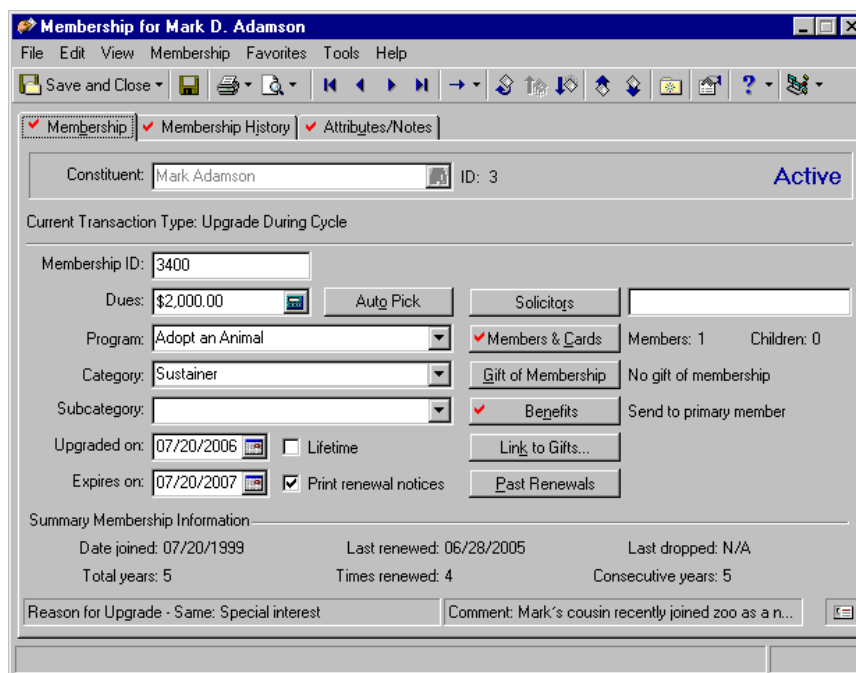
10. To save the changes and exit the record, click **Save and Close** on the toolbar.

Membership Reports

In addition to membership cards and renewal notices, you can also print membership specific reports. Membership reports track memberships, analyze membership activity, and create lists and directories of members. In addition, you can use membership reports to locate lapsed members, drop members who have not responded to renewal notices, and examine trends in membership. When you print membership reports, you can define the conditions records must meet to be included in the report. For more information about membership reports, refer to the *Reports Guide.*

View Other Memberships

Each constituent in your database can belong to several membership categories at the same time, if you leave the **Do not allow multiple concurrent memberships** checkbox unmarked on the Activity options folder of Business rules in *Configuration*. For more information about membership Business Rules, see "Membership Business Rules" on page 16.

You can view all memberships and membership transactions for a constituent by selecting **<All>** from the tree view on the left side of the Other Memberships screen or you can view selected memberships based on the other items available on the tree view. Only memberships for the selected tree view option display in the grid. The information is for display purposes only and cannot be edited.

▶ **View other memberships**

> *Scenario:* Your organization just established a new membership category for individuals interested in the arts. You know Dean Isley always supports these types of activities, but you want to make sure you do not ask him to become a member if he already has more than two memberships. Check his membership record to see how many memberships he holds.

1. From Dean Isley's membership record, select **Membership**, **View Other Memberships** from the menu bar. The Other Memberships for screen appears. For information about opening a membership record, see "Open a membership record" on page 6.
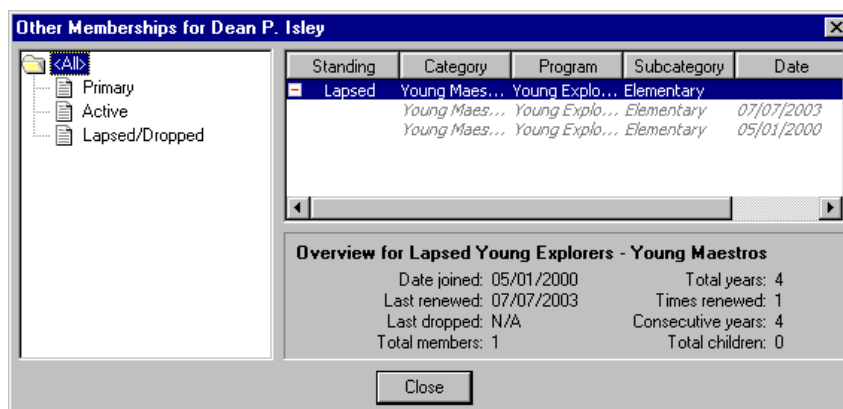
2. After viewing the information you want, click **Close**. You return to the Membership tab.

3. To exit the membership record, click **Save and Close** on the toolbar.

Membership Tab of a Constituent Record

The Membership tab displays, in summary form, all memberships for a constituent. In addition to working with the membership record, you can also open and delete an existing membership transaction from the Memberships tab. You can customize the way membership legends appear in the **Memberships** grid. For more information about customizing membership legends, see the User Options chapter of the *Program Basics Guide*.
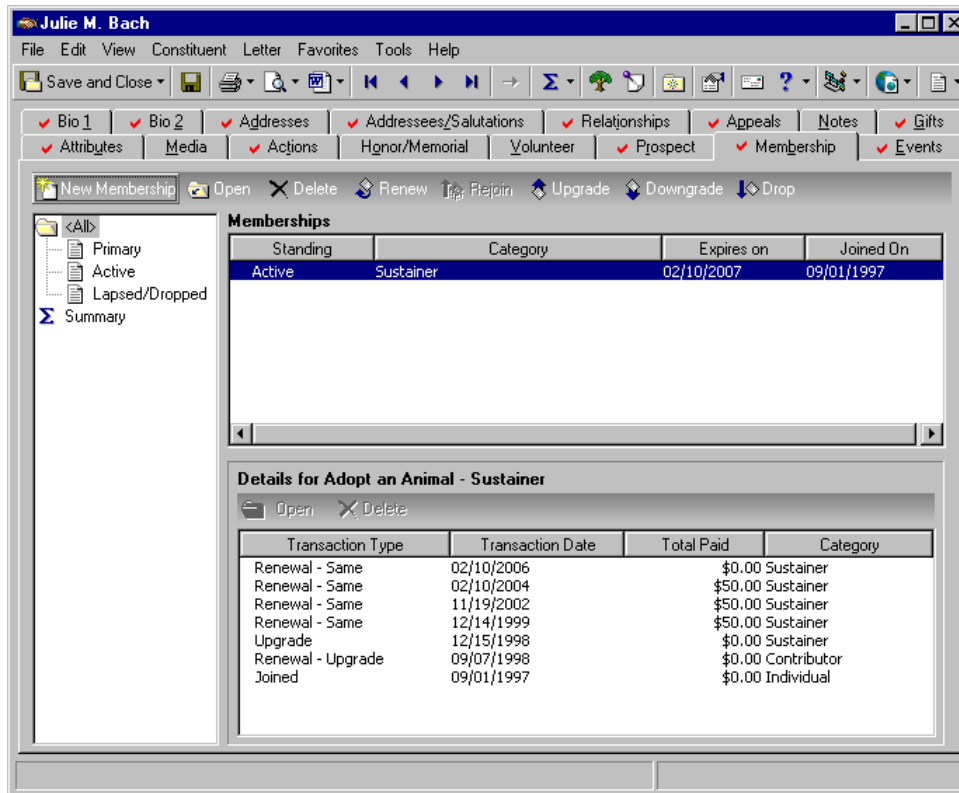
You can also add new membership transactions from the Memberships page or from the Membership tab of a constituent record. We recommend you use the Memberships page if you are adding membership transactions for a group of records. This section provides an overview of the features found on the Membership tab of a constituent record. For detailed instructions about specific options, see "Membership Transactions" on page 89.

Membership Transactions from the Membership Tab of a Constituent Record

Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

As mentioned earlier, "membership transaction" is the term used to describe the individual membership activities comprising a membership record. The activities can include adding, renewing, rejoining, upgrading, downgrading, and dropping a membership. From the Membership tab of a constituent record, you can perform all membership transactions. From the membership action bar, you can create, open, delete, renew, rejoin, upgrade, downgrade, and drop a membership. To access the screen associated with each transaction type, click the link on the action bar for the transaction you want to perform.

For detailed instructions about how to perform specific membership transactions, see "Membership Transactions" on page 89.

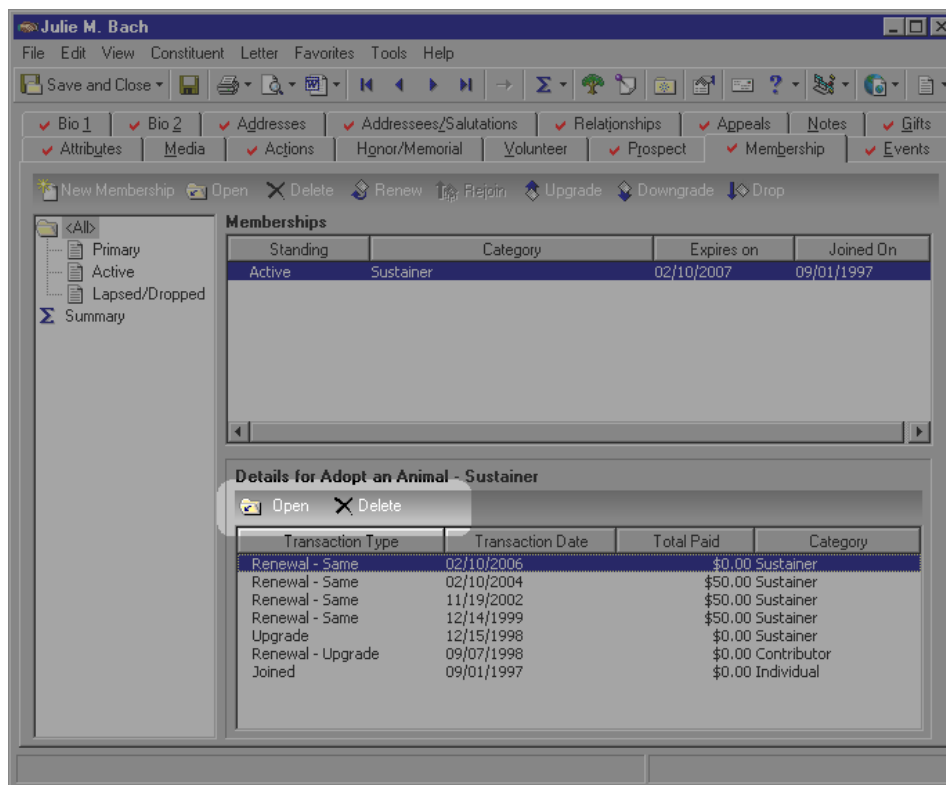# Membership Tab of a Constituent Record General Information

On the Membership tab of a constituent record, you can view all memberships and membership transactions for a constituent by selecting **<All>** from the tree view on the left side of the screen. If you select to view all memberships for a constituent, the **Memberships** grid displays a combination of primary, active, lapsed, and dropped memberships. In addition, the grid displays all memberships for which the constituent is the primary member. To view membership records specific to the Primary, Active, or Lapsed/Dropped membership standings, select the item from the tree view. Only memberships in selected categories display in the **Memberships** grid.
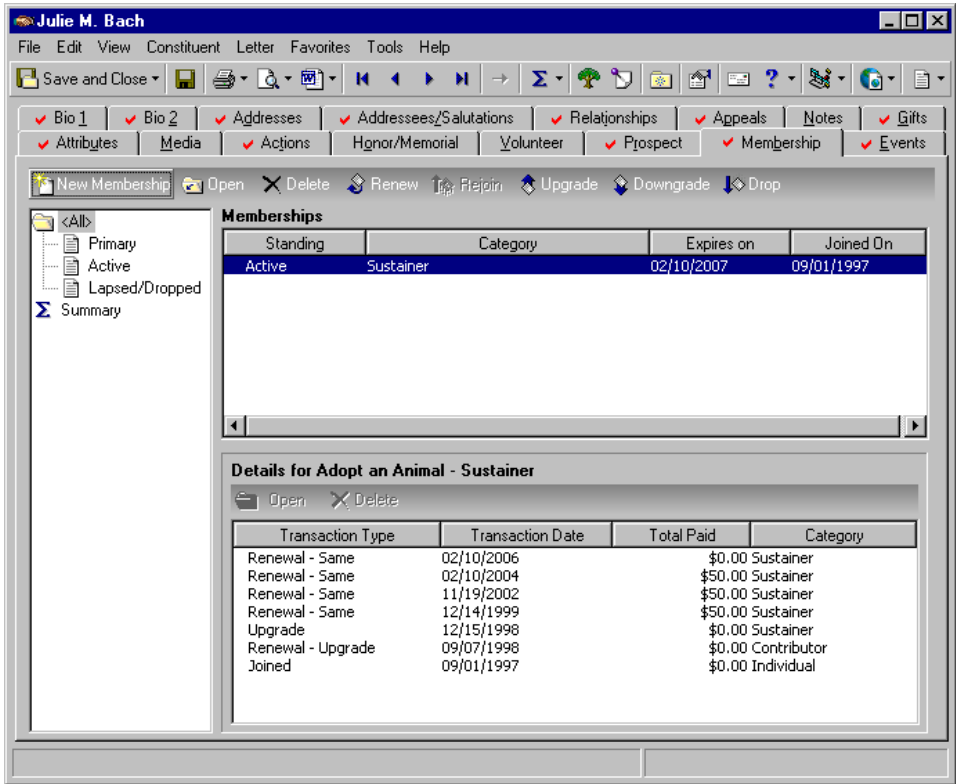
You can click the plus sign beside a specific membership record to view all the membership transactions for the record.

Note: For more information about deleting a membership transaction, see "Delete Historic Information" on page 82.

To display the membership transactions for a membership record, highlight the record you want to display in the **Memberships** frame. The information automatically appears in the **Details for** frame. From the **Details** frame, you can open and delete membership transactions by clicking **Open** and **Delete** on the Details action bar.

Summary Membership Information on a Constituent Record

On the tab of a constituent record, you can view a summary of all the membership information available for a specific constituent. To view summary information for a constituent, select the **Summary** option from the membership tree view.
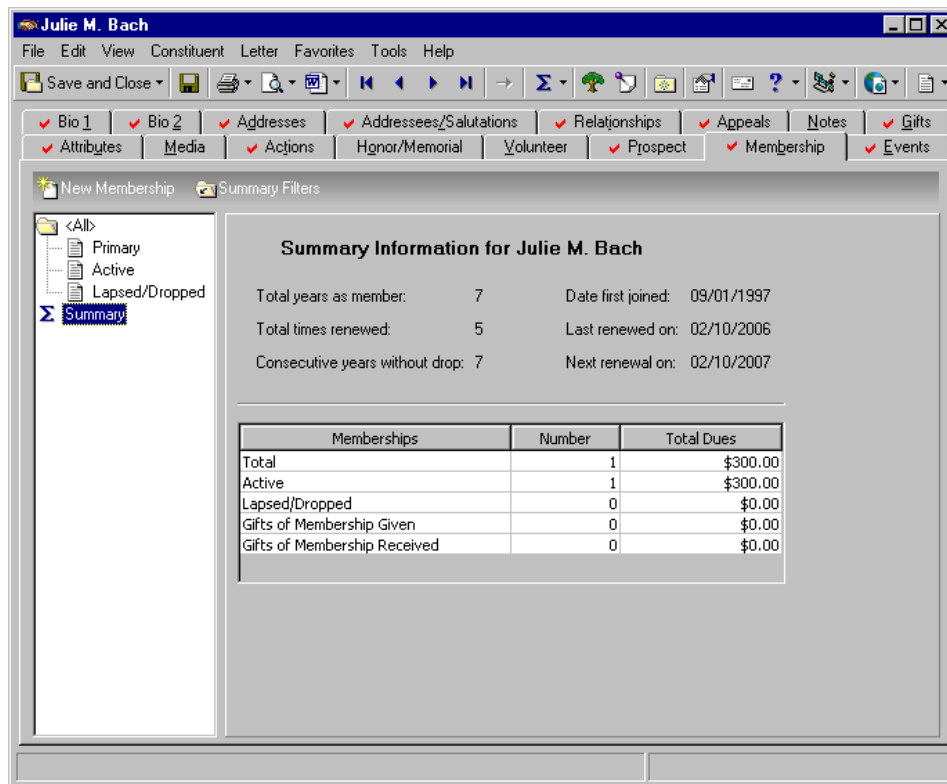
The right side of the tab displays information, including total years of membership, total number of renewals, consecutive years without dropping, date joined, and next and last renewal. For more information about membership summaries, see the *Summaries Guide*.

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