The Raiser's Edge™

Membership Gifts Guide

Contents

What Is In This Guide?

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

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 Gifts

When you create a membership record for a constituent, you can enter the dues amount the member must pay to receive the membership. To pay the dues for a membership, you need to link a gift record to the membership record. Dues can be paid by the person receiving the membership or by another constituent in your database. Multiple gifts can also be linked to a single membership. For example, Phillip Russell's two children, Susan and Tim, decide to give him an Individual membership to your organization. The dues for this membership are $50.00. Susan and Tim each send a check to your organization for $25.00 to pay their half of the membership dues. You can link the children's gifts to Phillip Russell's membership record to notate that dues have been paid for the 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*.

You can link a gift record to a membership record from either a membership or gift record. This book explains how to link a new gift record to an existing membership record.When you create a gift record for a dues payment, you can also create a new membership, renew an existing membership, rejoin a member to a lapsed membership, and upgrade or downgrade a current membership from a gift record. For information about linking a gift and membership record from a membership record, see the *Membership Data Entry Guide*.

Frequently Used Terms

This section defines words and phrases you need to know as you work with the optional module *Membership Management*. If you come across an unfamiliar term when reading this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

Membership dues. Membership dues are the obligations a constituent must pay to join a membership group. For example, a constituent may need to pay $50.00 to receive an Individual membership to your organization.

Membership record. A membership record is the location where constituent membership information is stored and maintained. This record is composed of three tabs: the Membership tab, the Membership History tab, and the Attributes/Notes tab. For more information about the tabs on a membership record, see the *Membership Data Entry Guide*.

Membership transaction. Membership transaction is a 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.

Membership standing. Membership standing describes the status of a specific membership. Membership standings include new, active, lapsed, and dropped. The membership standing appears in the top right-hand corner of a membership record and changes at the time the membership expires or a membership transaction is entered and saved.

Membership program. The membership program is the overall umbrella description for a group of membership categories. For example, a zoo may have a Kid's Club program with many different membership categories, such as Junior Curator and Junior Zookeeper.

Membership category. The 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 a Kid's Club program with three categories: Junior Curator, Junior Zookeeper, and Junior Animal Trainer. Each category requires a certain level of giving to participate. To participate in the Junior Zookeeper membership category, a constituent must pay $500.00.

Membership subcategory. A membership subcategory further defines the area of interest of the member. For example, the zoo with the Junior Curator category in the Kid's Club program may have subcategories listing the names of each animal in the zoo. When a constituent is a Junior Curator, he is assigned to a specific animal, such as Leo the Lion.

Gift of membership. The gift of membership occurs when the 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.

Navigating in Gifts

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*.

After you create a gift record for membership dues, you can access the gift record from the Gifts page. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.
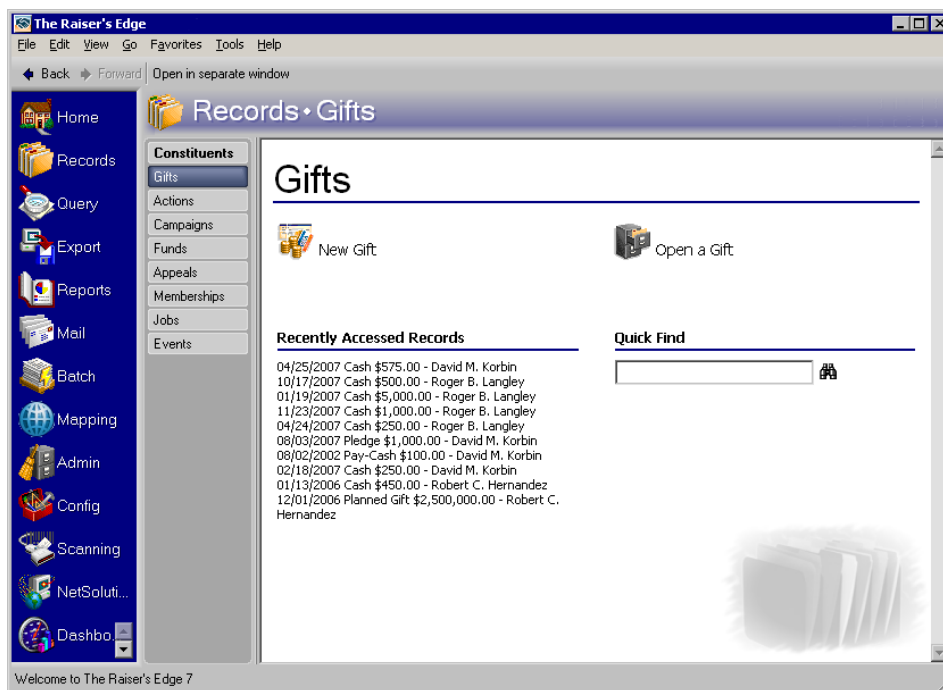
From the Gifts page, you can create new gift records for gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, Planned Gift (if you have the optional module *PlannedGiftTracker*), and Other. The Gifts page also contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

Accessing a Gift Record

After you create a gift record to pay membership dues, you can open the gift record from the Records page or the Gifts tab of the donor's constituent record the same way you open any other type of gift record. For more information about opening a gift record from the Records page, see the Gift Records chapter of the *Gift Records Guide*. For more information about opening a gift record from the Gifts tab on a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

Membership Business Rules

By setting business rules, you can control certain functions and displays throughout *The Raiser's Edge*. Unlike user options, business rules affect all users of the program, not just your user name. Several business rules are specific to linking a gift to a membership. For a membership transaction linked to a pledge, you can specify whether the pledge payment is automatically applied to the same membership, whether the program asks if you want to apply the payment to the same membership as the pledge, or whether the pledge payment is not applied to the same membership as the pledge. When adding a gift, the program can warn you if the constituent has a lapsed membership. For complete information about all available business rules, see the Configuration chapter of the *Configuration & Security Guide*.

▶ **Defining business rules**

> **Warning**: You must have security rights to access the **Business Rules** link in *Configuration*. For more information, see the Security chapter of the *Configuration & Security Guide*.

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

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

> **Note**: If the **Membership options** folder is closed, double-click the folder name to open the folder.

3. From the tree view on the left, select **General options** in the **Membership options** folder. The Business Rules screen now appears with the membership-related options.
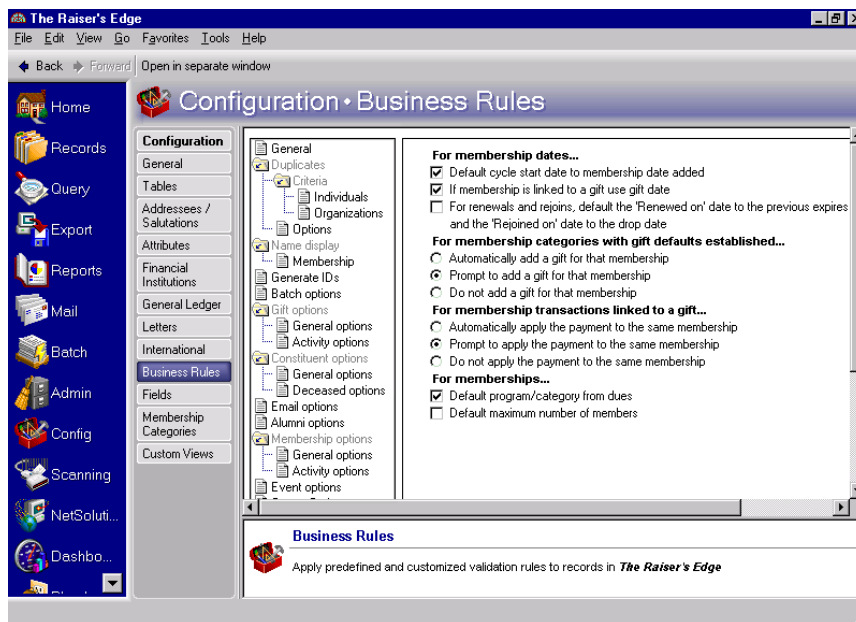
4. Under **For membership transactions linked to a gift**, select whether you want pledge payments to be automatically linked to the same membership transaction as the pledge; whether you want to receive a message asking if you want to link the pledge payment to the same transaction as the pledge; or whether you do not want to link the pledge payment to a membership.

5. From the tree view, select **Activity options** in the **Gift options**. The Business Rules screen now appears with the gift-related options.
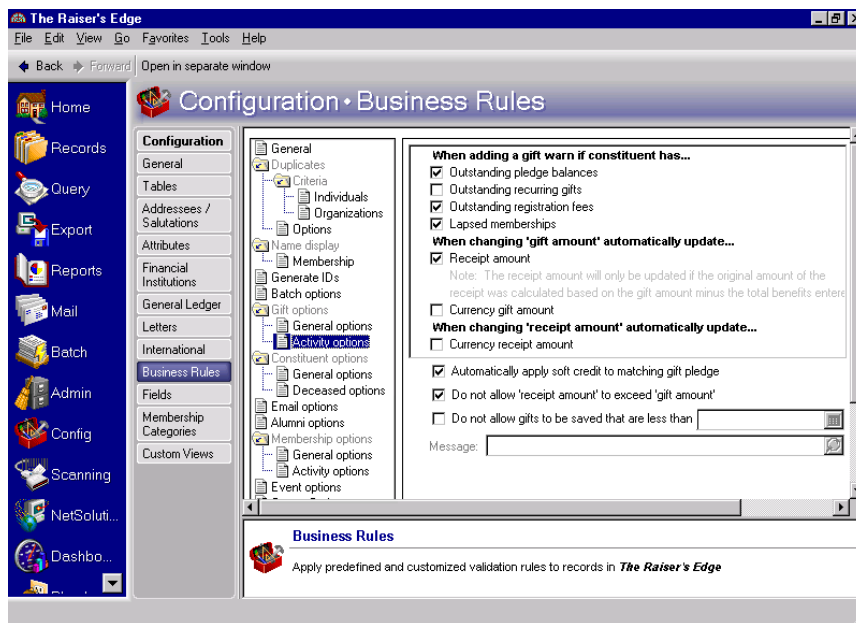
6. Under **When adding a gift warn if constituent has**, select whether you want to be warned when a constituent has a lapsed membership.

7. After you make changes to business rules, your preferences are updated right away.

Understanding Membership Dues and Gifts of Membership

When you add a new membership record for a constituent, you can specify the dues amount the constituent must pay to participate in the membership program. For example, your organization is a museum and you have a large membership program called Friends of the Museum. Within this membership program, you define membership categories, such as Individual, Double, and Family. When a constituent joins a membership, he must pay the required dues for the category he joins.

For example, Ginger Rosenberg, who visits your museum frequently, requested an Individual membership to Friends of the Museum. You create a membership record for Ginger's new Individual membership. For more information about creating membership records, see the *Membership Data Entry Guide*.

On a membership record, the **Gift of Membership** and **Link to Gifts** buttons show whether the membership was given as a gift by another constituent and whether membership dues have been paid. To show Ginger paid the required dues for her Individual membership, you need to link Ginger's membership record to a gift record. Once you link a gift to a membership, the **Link to Gifts** button on the Membership tab of a membership record changes to **View/Link Gifts**.

You may want to create and link a gift record to a membership record when you create the membership record. This book focuses on adding and linking a gift record to a membership record from Records or a gift batch. For more information about creating a membership record, see the *Membership Data Entry 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. For more information about the Renewal Information tab, see the Configuration chapter in the *Configuration & Security Guide*.

If you want to track that a membership is a gift from another constituent, you must click the **Gift of Membership** button and select the constituent giving the membership. When you click this button, the Gift of Membership screen appears.

Unless you use the **Gift of Membership** button to select the constituent who is giving the gift of membership, the membership is not considered a gift. For example, if Julie Bach gives her sister Mary a gift of membership, you need to enter her name on the Gift of Membership screen. When a constituent gives a gift of membership, you can choose whether the member or the constituent giving the membership receives the membership benefits and renewal information. For more information, see the *Membership Data Entry Guide*.

Linking a Gift to an Existing Membership

To track that dues have been paid for a membership transaction, you must create a gift record for the dues, then link the gift record to the membership. For example, if Rhonda Sherman gives $500.00 to become a lifetime member of your organization, you need to create a gift record for Rhonda's $500.00 gift. On the gift record, you can specify the campaigns, funds, and appeals to which the gift should be attributed; the solicitor responsible for the donation; the payment method; and any other information you want to record about the gift. Once you create a gift record, you can link it to a membership.

You can link a gift only to a primary membership. Gifts cannot be linked to a joint membership because a membership is stored by the name of the primary member. For example, Jan Owen purchases a membership to your organization and you add her husband Phil Owen as a joint member. When you receive a gift to pay the membership dues, you need to link the gift record to Jan Owen's membership record because she is the primary member. For more information about adding joint members, see the *Membership Data Entry Guide*. Also, you cannot link a gift to a membership with a standing of Dropped. If you receive a payment for dues for a dropped membership, you must first rejoin the membership before you can link a gift record to the membership. For more information about rejoining a membership, see the *Membership Data Entry Guide*.

▶ **Linking a gift to an existing membership from a gift record**

You can use this procedure to link membership dues paid by the member to a membership record. If you want to link a membership to a pledge, see the Pledges chapter of the *Gift Records Guide*. If you want to link a membership to a recurring gift, see the Recurring Gifts chapter of the *Gift Records Guide*. For more information about creating membership records, see the *Membership Data Entry Guide*.

Scenario: Ginger Rosenberg needs to upgrade her Patron membership for the Adopt an Animal program. A membership record for Ginger already exists in your database. On 10/10/2005, you receive a $75.00 check from Ginger to pay her dues. Now, you need to create a new gift record for Ginger's dues and link it to her existing membership 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.

1. From Ginger Rosenberg's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.
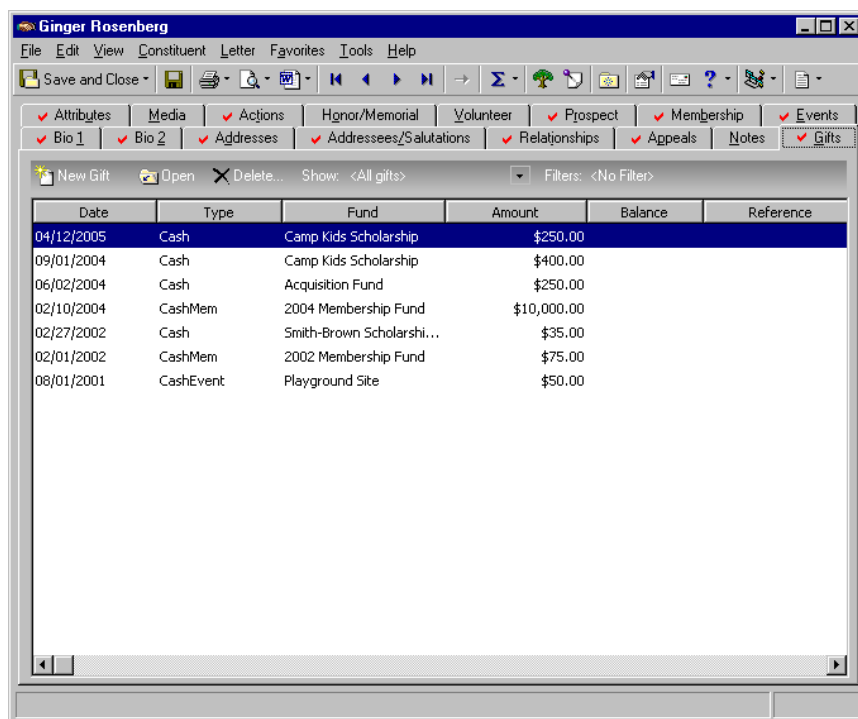
2. On the action bar, click **New Gift**. The New Gift screen appears.

3. From the New Gift screen, select the Gift tab and add the information about Ginger's gift as shown on the screen below. For more information about adding a gift record, see the Gift Records chapter of the *Gift Records Guide*.

4. To link the gift to Ginger's existing membership record, select **Gift**, **Links** from the menu bar or click the **Links** button on the toolbar. When the submenu appears, select **Membership**. The Link Gift to Membership screen appears.

5. In the **Link?** column, mark the checkbox in the row containing Ginger's Couple membership.

6. In the **Amount Applied** column for Ginger's membership, enter the amount $75. When you tab through the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $75.

7. Click **OK**. You return to Ginger's gift record.

8. Click **Save and Close** on the toolbar. Ginger's gift record is now linked to her Individual membership.

▶ **Linking a gift to an existing membership from a gift batch**

You can use this procedure to link membership dues paid by the member to a membership record. If you want to link a membership to a pledge or recurring gift, see "Linking a Membership to a Pledge" on page 12 and "Linking a Membership to a Recurring Gift" on page 24. Before you use this procedure, you must create a membership record for the constituent. For more information about creating membership records, see the *Membership Data Entry Guide*.

Scenario: Ginger Rosenberg needs to upgrade her Patron membership for the Adopt an Animal program. A membership record for Ginger already exists in your database. On 10/10/2005, you receive a $75 check from Ginger to pay her dues. Now, you need to create a new gift record for Ginger's dues and link it to her existing membership record.

Note: While in the gift record, if you ever need to view the batch number a gift was posted through, select **File**, **Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

1. From a gift batch, add a gift of $75 for Ginger Rosenberg as shown on the screen below. For more information about setting up a gift batch and entering gifts into the batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.
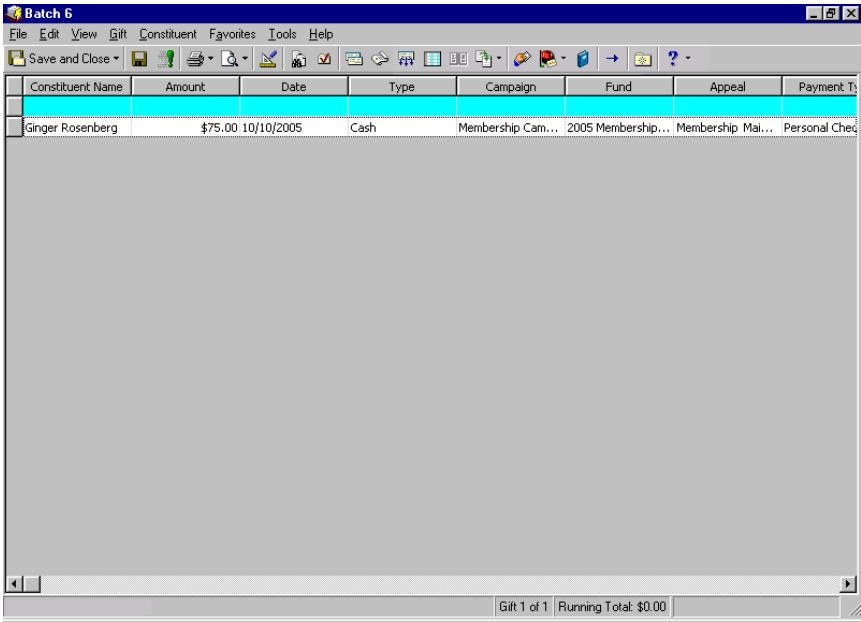
2. With your cursor in the row of the batch containing Ginger's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Membership**. The Link Gift to Membership screen appears.
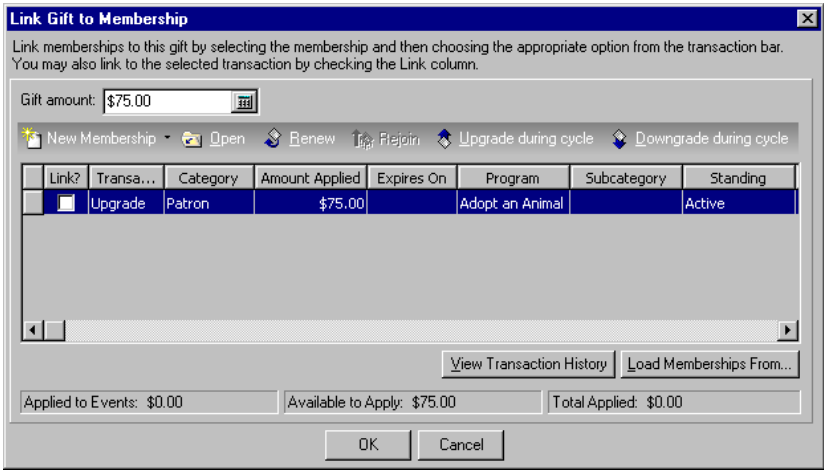
3. In the **Link?** column, mark the checkbox in the row containing Ginger's Couple membership.

4. In the **Amount Applied** column for Ginger's membership, enter the amount $75. When you tab through the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $75.

5. Click **OK**. You return to the Batch Data Entry screen.

6. To add this gift record to the database, you need to commit the gift batch. For more information about committing a gift batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.

Linking a Membership to a Pledge

There may be situations when a constituent makes a pledge to pay membership dues according to a schedule. In this case, you can create a pledge gift record and link the pledge to a membership record. When paying membership dues with a pledge, you need to link the pledge gift record and the gift records for the pledge payments to the membership record. You can set the **For membership transactions linked to a gift** business rule to automatically remind you if a pledge payment should be linked to a membership. We strongly recommend you set this business rule. For more information about automatically linking pledge payments to a membership, see "Membership Business Rules" on page 4.

▶ **Linking a pledge to an existing membership from a gift record**

You can use this procedure to link a pledge gift record to a membership record. Before you can link a pledge to an existing membership, you must create a membership record for the constituent. For more information about creating membership records, see the *Membership Data Entry Guide*.

> *Scenario:* Lucy Avdeenko wants to purchase a Lifetime membership to your organization. However, the dues for a Lifetime membership are $5,000 and Lucy cannot pay that amount in one payment. Lucy agrees to make a $5,000 pledge to your organization. She plans to pay this pledge in ten quarterly installments. You created a membership record for Lucy's Lifetime membership. Now, you need to add a pledge gift record for Lucy and link this gift record to Lucy's existing Lifetime membership record.

Note: You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that says "Please see the Supervisor before changing information to this gift record." The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit**, **Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Mark the **Display annotation automatically** checkbox and the message appears whenever the record opens.

1. From Lucy Avdeenko's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.
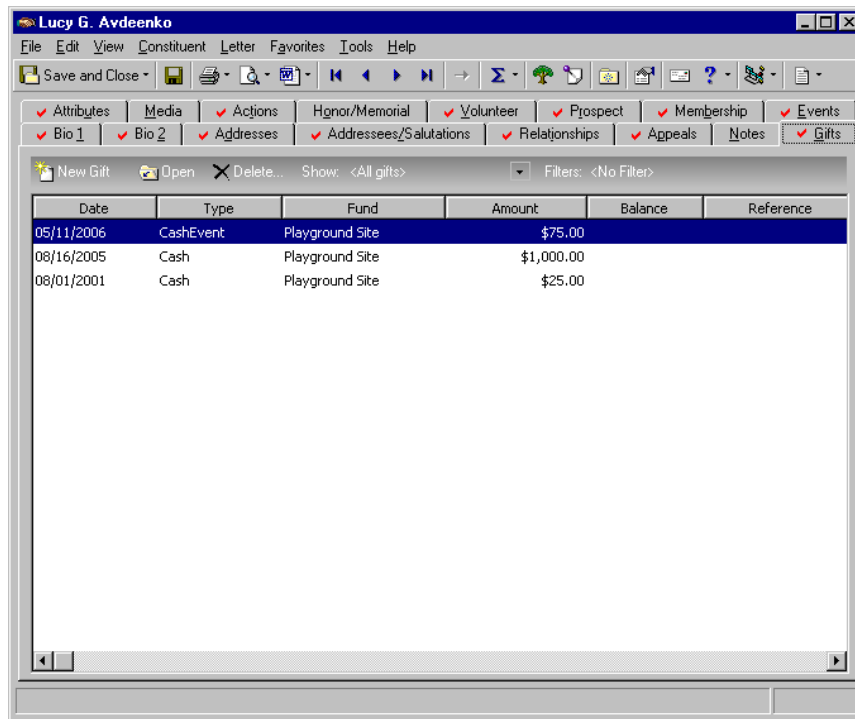
2. On the action bar, click **New Gift**. The New Gift screen appears.

3. From the New Gift screen, select the Gift tab and add the information about Lucy's gift as shown on the screen below. For more information about adding a pledge gift record, see the Pledges chapter of the *Gift Records Guide*.

4. Select the Installments/Payments tab.

5. Click **Schedule** and schedule Lucy's pledge as shown on the screen below. For more information about scheduling a pledge, see the Pledges chapter of the *Gift Records Guide*.

6. Click **OK** to return to the Installments/Payments tab.

Note: Because Lucy's Lifetime membership has already been added to the database, it appears in the grid on the Link Gift to Membership screen.

7. To link the gift to Lucy's existing membership record, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Membership**. The Link Gift to Membership screen appears.

8. In the **Link?** column, mark the checkbox in the row containing Lucy's Lifetime membership.

9. In the **Amount Applied** column for Lucy's membership, enter the amount $5,000. When you tab through the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $5,000.

10. Click **OK**. You return to Lucy's gift record.

11. Click **Save and Close** on the toolbar. Lucy's gift record is now linked to her Lifetime membership.

▶ **Linking a pledge to an existing membership from a gift batch**

You can use this procedure to link a pledge gift record to a membership record. Before you use this procedure, you must create a membership record for the constituent. For more information about creating membership records, see the *Membership Data Entry Guide*.

> *Scenario:* Lucy Avdeenko wants to purchase a Lifetime membership to your organization. However, the dues for a Lifetime membership are $5,000 and Lucy cannot pay that amount in one payment. Lucy agrees to make a $5,000 pledge to your organization. She plans to pay this pledge in ten quarterly installments. You created a membership record for Lucy's Lifetime membership. Now, you need to add a pledge gift record for Lucy and link this gift record to Lucy's existing Lifetime membership record.

1. From a gift batch, add a gift of $5000 for Lucy Avdeenko as shown on the screen below. For more information about setting up a gift batch and entering gifts into the batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.

2. With your cursor in the row of the batch containing Lucy's gift, select **Gift**, **Installment Information** from the menu bar. The Pledge Installment Schedule screen appears. Schedule Lucy's pledge as shown on the screen below. For more information about scheduling pledges, see the Pledges chapter of the *Gift Records Guide*.

3. Click **OK**. You return to the Batch Data Entry screen.

> **Note**: Because you already added Lucy's Lifetime membership to the database, it appears in the grid on the Link Gift to Membership screen.

4. With your cursor in the row of the batch containing Lucy's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Membership**. The Link Gift to Membership screen appears.

5. In the **Link?** column, mark the checkbox in the row containing Lucy's Lifetime membership.

6. In the **Amount Applied** column for Lucy's membership, enter the amount $5,000. When you tab through the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $5,000.

7. Click **OK**. You return to the Batch Data Entry screen.

8. To add this gift record to the database, you need to commit the gift batch. For more information about committing a gift batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.

Linking a Pledge Payment to a Membership

When a constituent pays for a membership using a pledge, you need to link the gift record for the pledge and pledge payments to the membership to show that the dues are paid. We recommend you set the **For membership transactions linked to** a gift business rule to remind you when pledge payments should be applied to a membership. For more information, see "Membership Business Rules" on page 4.

This section explains how to link a pledge payment to a membership from a gift record and a gift batch. For more information about linking a gift to a membership from a membership record, see the *Membership Data Entry Guide*.

▶ **Applying a pledge payment toward an existing membership from a gift record**

> *Scenario:* Lucy Avdeenko is paying for her Lifetime membership in 10 quarterly installments. She sends in a check for $500. You need to add a gift record for Lucy's pledge payment and link this gift record to Lucy's existing Lifetime membership record. Before you link a pledge payment to a membership, you need to link the pledge gift record to the membership. This scenario uses the pledge gift record linked in "Linking a pledge to an existing membership from a gift record" on page 12 in this chapter.

1. From Lucy Avdeenko's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.
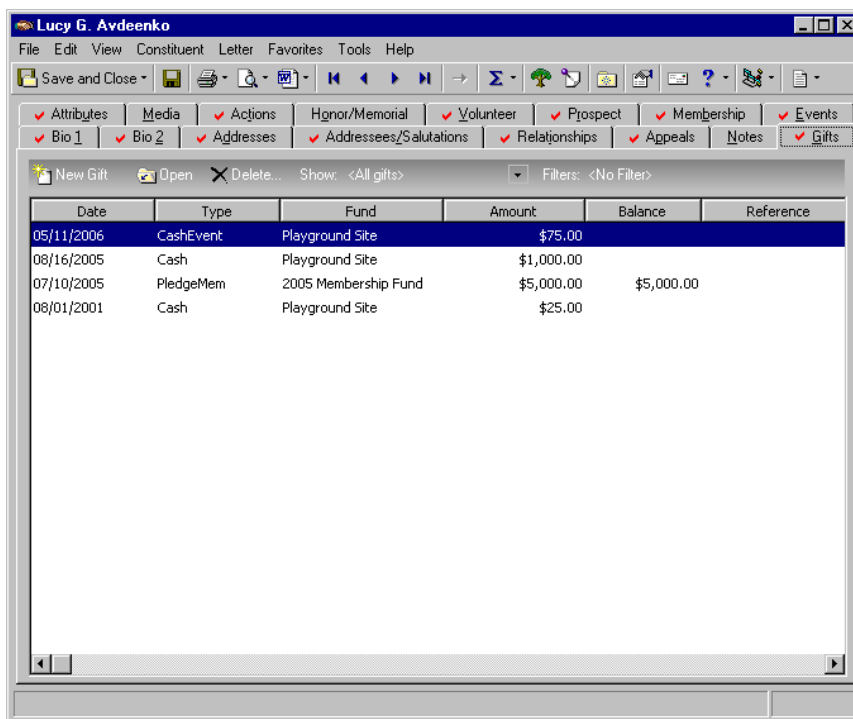
Note: This message appears when you mark the **When adding a gift warn if constituent has outstanding pledge balances** checkbox in *Configuration*. If you do not receive this message, select **Gift**, **Apply to** from the menu bar. When the submenu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears.

2. On the action bar, click **New Gift**. A message appears.

3. Click **Yes** to apply Lucy's payment toward her existing pledge. The Apply Gift to Pledge(s) screen appears.

4. In the **Payment amount** field, enter the amount $500.

5. In the **Pay?** column, mark the checkbox in the row containing Lucy's $5,000 pledge.

6. Click **Auto-Distribute**. The program adds the **Payment amount** to the **Amount Applied** column for Lucy's $5,000 pledge.

7. Click **OK**. A message appears.
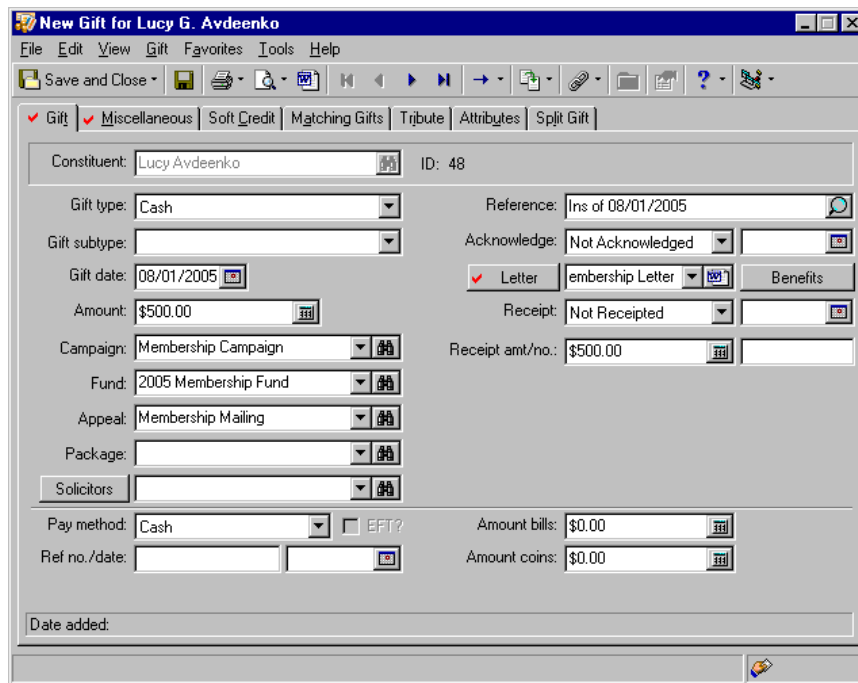
This message appears when you set the **For membership transactions linked to a gift** business rule on the Membership options page of business rules in *Configuration* to automatically ask if you want to apply a payment to the same membership as a pledge. If you did not set this business rule, you can link a pledge payment to a pledge using the same procedure as in "Linking a gift to an existing membership from a gift record" on page 8.

8. Click **Yes** to link Lucy's pledge payment to the same membership record as her pledge.

9. Click **OK**. You return to the Gift tab of Lucy's gift record. The program defaults information from the pledge record to this gift record for the pledge installment.

10. In the **Gift date** field, enter the date 08/01/2005 because this is the date you receive the first pledge payment.

11. In the **Pay method** field, select "Personal Check".

12. In the **Check no./date** fields, enter the check number "872" and the date 07/28/2005.

13. Click **Save and Close** on the toolbar. Lucy's pledge payment is now linked to her Lifetime membership.

▶ **Applying a pledge payment toward an existing membership from a gift batch**

You can use this procedure to apply a pledge payment to a pledge already entered in the database.

Scenario: Lucy Avdeenko is paying for her Lifetime membership in 10 quarterly installments. She sends you a check for $500. You need to add a gift record for Lucy's pledge payment and link this gift record to Lucy's existing Lifetime membership record. Before you link a pledge payment to a membership, you need to link the pledge gift record to the membership. This scenario uses the pledge gift record linked in "Linking a pledge to an existing membership from a gift record" on page 12 in this chapter.

Note: If you do not receive a message, select **Gift**, **Apply to** from the menu bar. When the submenu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears.

1. From a gift batch, enter "Lucy Avdeenko" in the **Constituent Name** column. For more information about opening a gift batch, see the Batch Entry of Gifts chapter of the *Batch Guide*. After you enter Lucy's name in the **Constituent Name** column, a message appears.
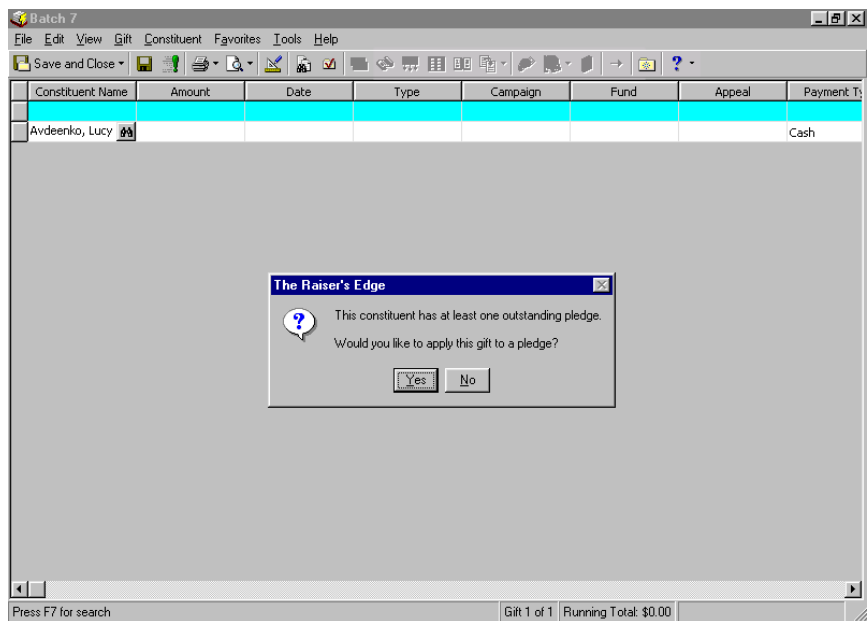
2. Click **Yes** to apply Lucy's payment toward her existing pledge. The Apply Gift to Pledge(s) screen appears.
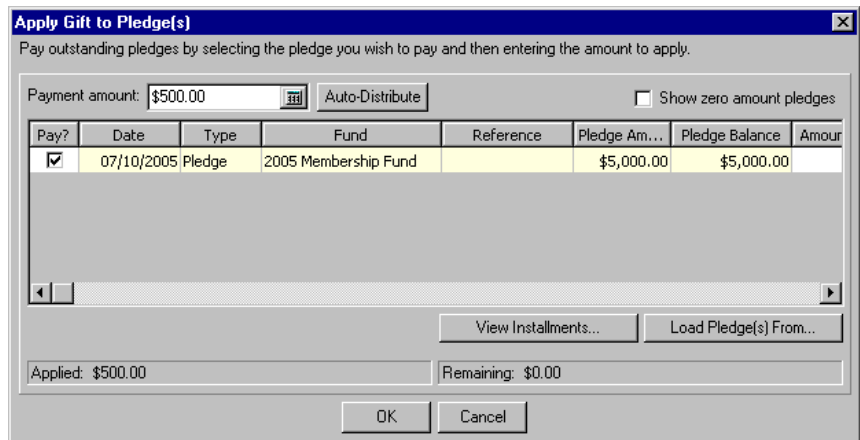
3. In the **Payment amount** field, enter the amount $500.

4. In the **Pay?** column, mark the checkbox in the row containing Lucy's $5,000 pledge which is linked to a membership.

5. Click **Auto-Distribute**. The program adds the **Payment amount** to the **Amount Applied** column for Lucy's $5,000 pledge.

6. Click **OK**. If you mark the **Prompt to apply the payment to the same membership** option business rule, a message appears prompting you to apply the payment to the same membership. For more information about membership business rules, see the Configuration chapter in the *Configuration & Security Guide*.

7. Click **Yes**. The gift is now linked to the same membership.

8. You return to the Batch Data Entry screen. The program defaults information from the pledge record into the row in the Data Entry grid for Lucy's pledge payment.

9. Add any additional information, including the payment method and posting status, to Lucy's row in the gift batch.

   To create gift records for Lucy's pledge and pledge payment, you need to commit this gift batch to the database. When you commit the gift batch, you can mark the **If a payment is applied to a gift that is linked to a membership, apply the payment to the same membership** checkbox on the Payments tab of the Commit Gift Batch screen. If you have not already linked the pledge payment to the membership record, marking this checkbox links the pledge payment. If you do not mark this checkbox, the pledge payment is not linked to the membership record. For more information about committing a gift batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.

Linking a Membership to a Recurring Gift

There may be situations when a constituent establishes a recurring gift to pay membership dues according to a schedule. In this case, you can create a recurring gift record and link the recurring gift to a membership record. When paying membership dues with a recurring gift, you need to link the recurring gift record and the gift records for the recurring gift transactions to the membership record. You can set the **For membership transactions linked to a gift** business rule to remind you when recurring gift transactions should be applied to a membership.

Linking a Recurring Gift Transaction to a Membership

When a constituent pays for a membership using a recurring gift, you need to link the gift records for the recurring gift and recurring gift transactions to the membership to show that the dues are paid. We recommend you set the **For membership transactions linked to a gift** business rule to remind you when recurring gift transactions should be applied to a membership. For more information, see "Membership Business Rules" on page 4.

This section explains how to link a recurring gift transaction to a membership from a gift record and a gift batch. For more information about linking a gift to a membership from a membership record, see the *Membership Data Entry Guide*.

▶ **Applying recurring gift transactions to an existing membership from a gift record**

> *Scenario:* During your annual Membership Phonathon, Dr. Kate Andrea Williams, who is already a member of your museum, pledges a recurring gift. She is paying by direct debit and says she will give this gift amount on an annual basis, throughout her working career. She also stipulates that the $100 gift go toward her dues for her Individual membership to your museum. Create a gift record for the recurring gift and link it to Dr. Williams' membership record.

1. From the ***Raiser's Edge*** menu bar, select *Records*.

2. Click the **Gifts** link. The Gifts page appears.
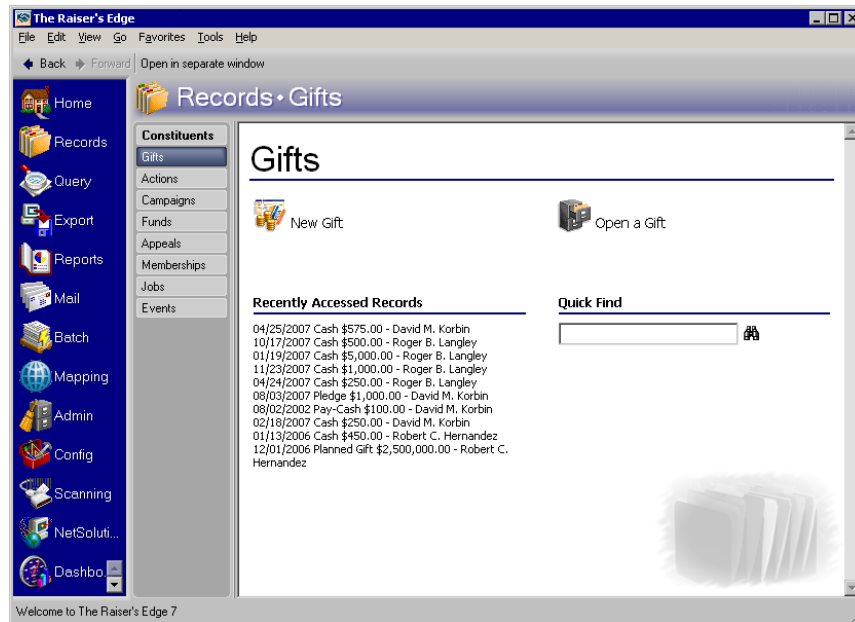
3. From the Gifts page, click **New Gift**. The New Gift screen appears.

4. In the **Constituent** field, click the binoculars to search your database for Dr. Kate Andrea Williams, the constituent for whom you want to link the recurring gift to the membership. Highlight Dr. Kate Andrea Williams on the grid of the Open screen and click **Open**. Her name appears automatically in the **Constituent** field. For more information about searching for a record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

5. Enter information on the Gift tab as shown in the picture below. For more information about adding a gift record, see the *Gift Records Guide*.

6. Select the Transactions tab.

7. Click **Schedule** to establish a recurring gift payment schedule. The Transaction Schedule screen appears.

8. In the **Frequency** field, select "Annually". Enter schedule information as shown on the picture below. For more information about establishing a recurring gift schedule, see the Recurring Gifts chapter of the *Gift Records Guide*.
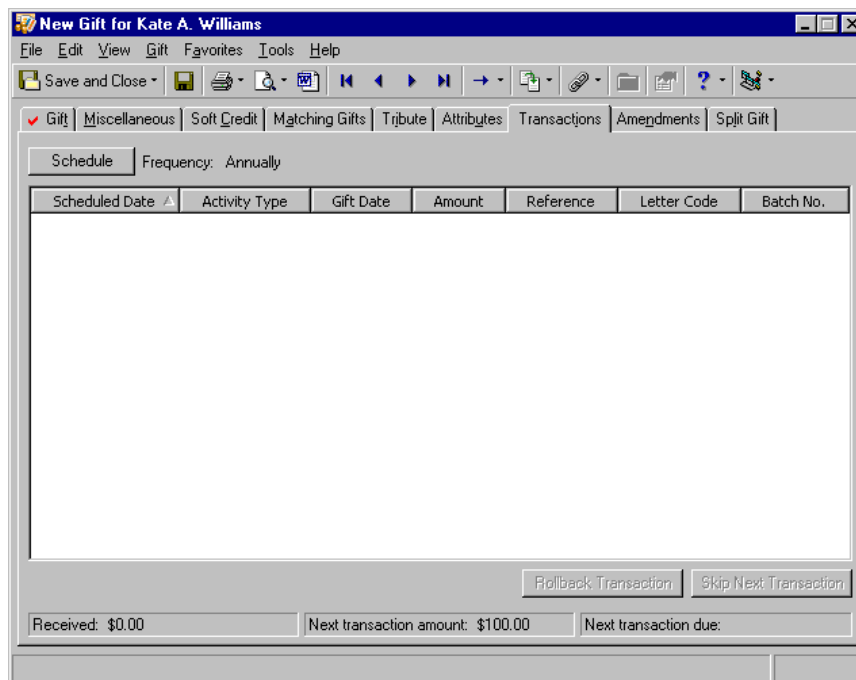
9. Click **OK**. You return to the Transactions tab of the gift record.

10. On the toolbar, click the **Links** button and select **Membership** from the submenu that appears.
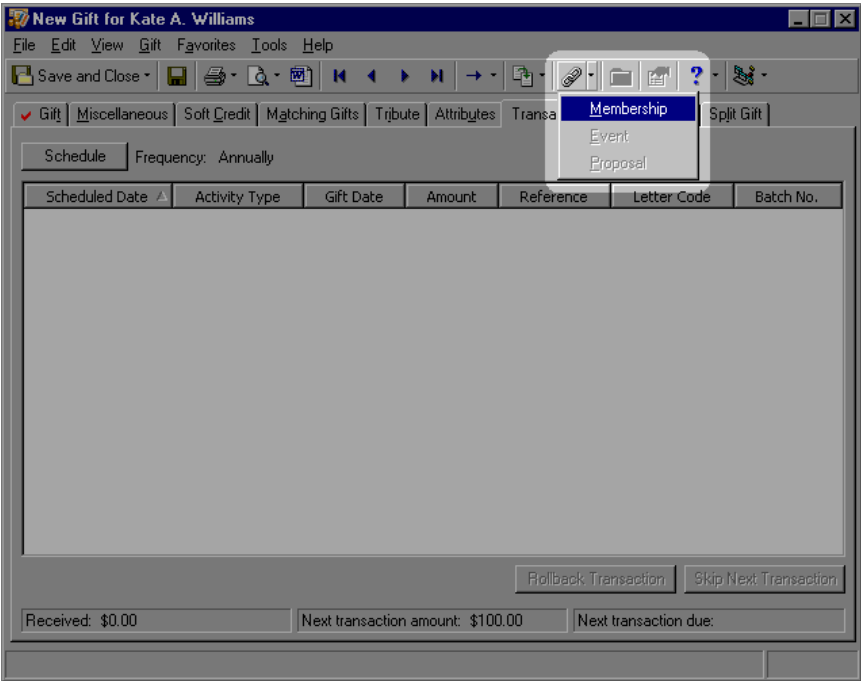
The Link Gift To Membership screen appears.
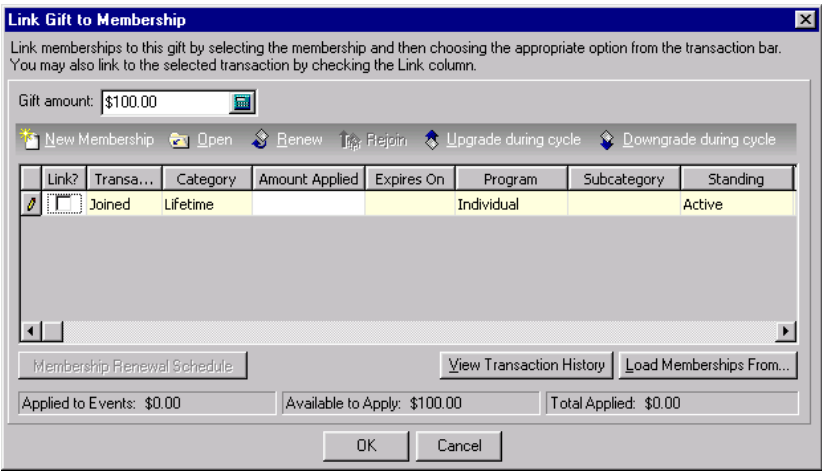
11. Mark the **Link?** checkbox next to the membership to which you want to link the recurring gift transactions.

12. In the **Amount Applied** column on the grid, enter the gift amount $100 to be applied to the membership.

13. Click **OK**. You return to the Transaction tab of the gift record.

14. Click **Save and Close** to save the link and close the gift record.

▶ **Applying recurring gift transactions to an existing membership from a gift batch**

Scenario: On 09/01/2006, Anthony Ellis sends a check for $30 to your organization as his monthly recurring gift payment. You need to apply the payment to his recurring gift transaction and link the transaction to his existing Arts Program membership.

1. From a gift batch, add a cash gift of $30 for Anthony Ellis as seen on the screen below. For more information about creating a new gift batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.

2. From the menu bar, select **Gift**, **Apply to**, **Recurring Gift**. The Apply Gift to Recurring Gift screen appears.

3. Mark the **Pay?** checkbox for the corresponding recurring gift.

4. Click **OK**. If you marked the **Prompt to apply the payment to the same membership** option business rule, a message appears prompting you to apply the payment to the same membership. For more information about membership business rules, see the Configuration chapter in the *Configuration & Security Guide*.

5. Click **Yes**. The gift is now linked to the same membership.

6. You return to the Batch Data Entry screen.

7. Add any additional information, including the payment method and posting status, to Anthony's row in the gift batch.

To create gift records for Anthony's recurring gift payment, you need to commit this gift batch to the database. When you commit the gift batch, you can select to mark the **If a payment is applied to a gift that is linked to a membership, apply the payment to the same membership** checkbox on the Payments tab of the Commit Gift Batch screen. If you have not already linked the recurring gift payment to the membership record, marking this checkbox will link the recurring gift payment. If you do not mark this checkbox, the payment is not linked to the membership record. For more information about committing a gift batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.

Automatically Renewing a Membership Linked to a Pledge or Recurring Gift

When you have the optional module *Electronic Funds Transfer*, you can automatically generate gift records for recurring gift transactions and pledge payments using the **Automatically Generate Transactions/Payments** option in *Batch*. For example, Mark Adamson has a membership linked to a recurring gift. When you select the **Automatically Generate Transactions/Payments** option in *Batch*, you can automatically generate a payment for the recurring gift linked to his membership. Mark's recurring gift payment information defaults into a row in the gift batch.

This option is only available when the optional module *Electronic Funds Transfer* is present. For more information about automatically generating pledges and recurring gifts, see the *Electronic Funds Transfer (EFT) Guide*.

▶ **Automatically renewing a membership linked to a recurring gift or a pledge**

This procedure shows you how to automatically renew a membership linked to a recurring gift. You can automatically renew a membership linked to a pledge by using the same method.

1. Add a new recurring gift record as shown on the screen below. For more information about adding recurring gift records, see the Recurring Gifts chapter of the *Gift Records Guide*.

2. On the toolbar, click the **Links** button and select **Membership** from the menu that appears.

The Link Gift to Membership screen appears.

3. On the Link Gift to Membership screen, mark the checkbox in the **Link?** column by the membership you want to link to this recurring gift.

4. Click **Membership Renewal Schedule**. The Membership Renewal Schedule screen appears.

5. Mark the **Renewal Schedule Information** checkbox and enter information on the screen as shown in the picture below.

6. Click **OK**. You return to the Link Gift to Membership screen.

7. On the Link Gift to Membership screen, enter the amount $50 in the **Amount Applied** column of the membership you selected.

8. Click **OK**. You return to the New Gift Screen.

9. Click **Save and Close** on the toolbar.

10. In *Batch*, from the Data Entry screen of a gift batch, select **Tools**, **Automatically Generate Transactions/Payments** from the menu bar.
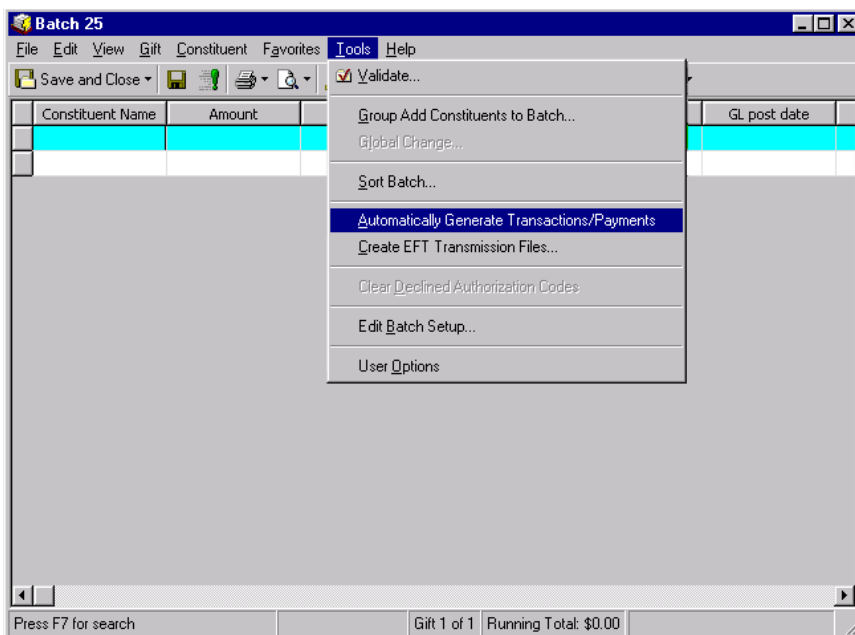
The Automatically Generate Transactions/Payments screen appears. For more information about setting up a new gift batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.
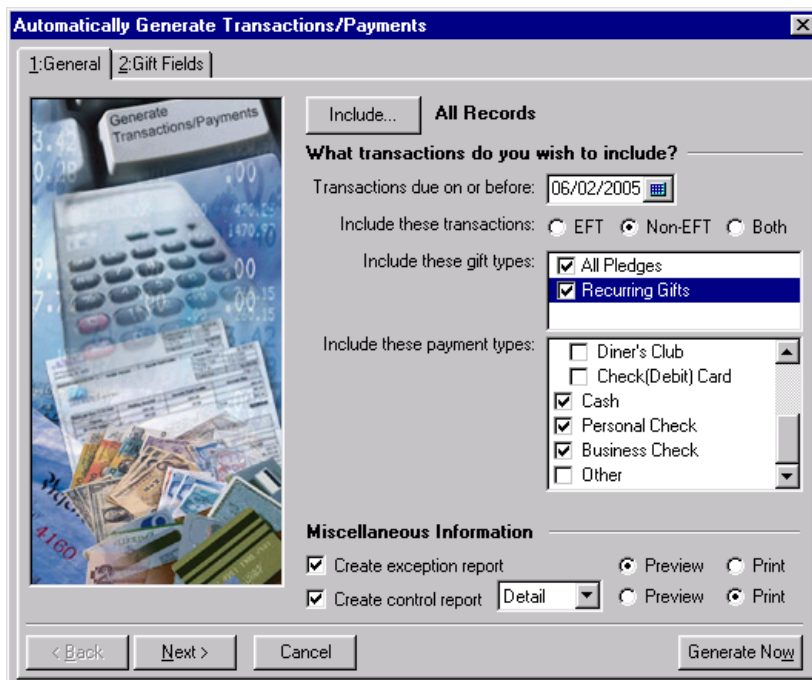
11. Click **Include**. From the submenu that appears, select **All Records**. When you select **All Records**, you are specifying that all records in the database matching the criteria you set for automatically generating payments and transactions are included.

    If you choose **Selected Records**, the Open Query screen appears so you can include records in an established gift query or create a new gift query. When you choose **Selected Records**, you are specifying that only specific records matching the criteria you set for automatically generating payments and transactions are included.

12. In the **Transactions due on or before** field, enter the date 06/02/2005 because you want the program to select the recurring gifts that require transactions and payments on or before this date.

13. In the **Include these transactions** field, select **Non-EFT** because you only want to generate transactions for non-electronic gifts at this time.

14. In the **Include these gift types** box, mark the **Recurring Gifts** checkbox to generate recurring gift transactions at this time.

15. In the **Include these payment types** box, mark the **Cash**, **Personal Check**, and **Business Check** checkboxes.

16. Mark the **Create exception report** checkbox to keep a record of the transactions and payments that are not able to be generated. Mark the **Preview** option. If exceptions are found, you can preview the report on a screen. You can also select to print the exception report from the exception report preview screen.

17. Mark the **Create control report** checkbox to keep a record of the type of transactions you generated. Select "Detail" in the accompanying field. Mark the **Print** option. The control report automatically prints when you generate the payments and transactions.

    You create control reports, in summary or detail format, to view information about a batch. You can use the reports to verify that information in a batch is correct, for reporting purposes, or for any other needs specific to your organization.

18. Click **Next** to view the Gift Fields tab.

19. In the **Gift date** field, select "Specific date" because you want the gift date for all generated gift records to be 06/02/2007 regardless of when the installment or transaction was due. In the accompanying **Gift date** field, enter the date 06/02/2007.

20. In the **Reference** field, select "System generated". The program automatically adds information in the **Reference** field on the Gift tab of a gift record to note how the transaction was generated.

21. In the **Letter** field, select "Use letter from gift". When you make this selection, the program copies the letter you selected on the gift record of the recurring gift to the generated gift record for the transaction or payment.

22. In the **GL post status** field, select "Not posted" because you plan to use the **Post to GL** option in *Administration* to post the gifts to *General Ledger*. For more information about the **Post to GL** option, see the Gift Records chapter of the *Gift Records Guide*.

23. In the **GL post date** field, enter the date 06/02/2005.

> **Note**: This option defaults to marked under the **For membership transactions linked to a gift** business rule option, if you select **Automatically apply the payment to the same membership**. If you select **Prompt to apply the payment to the same membership** or **Do not apply the payment to the same membership** is selected for this business rule, then **If a transaction/payment is generated for a gift that is linked to a membership: Apply the payment to the same membership** defaults to unmarked.

24. Under **If a transaction/payment is generated for a gift that is linked to a membership**, leave the **Apply the payment to the same membership** option marked. When you mark this checkbox and select to automatically generate pledge and recurring gift payments, payments are linked to the same membership that is linked to the pledge or recurring gift. If the payment generates a renewal, then the payment is linked to the renewal. For more information about the tabs on the Automatically Generate Transactions/Payments screen, see the *Electronic Funds Transfer (EFT) Guide*.

25. Click **Generate Now** to begin generating gift records for recurring gift transactions. A progress indicator appears.
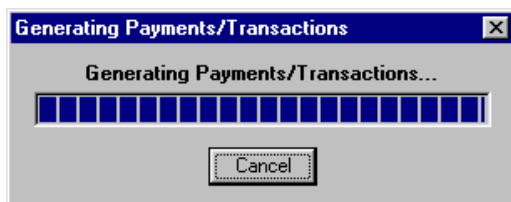
26. When the program finishes generating the transactions and payments, the Automatically Generate Transactions/Payments screen appears, detailing the results of the automatic generation.
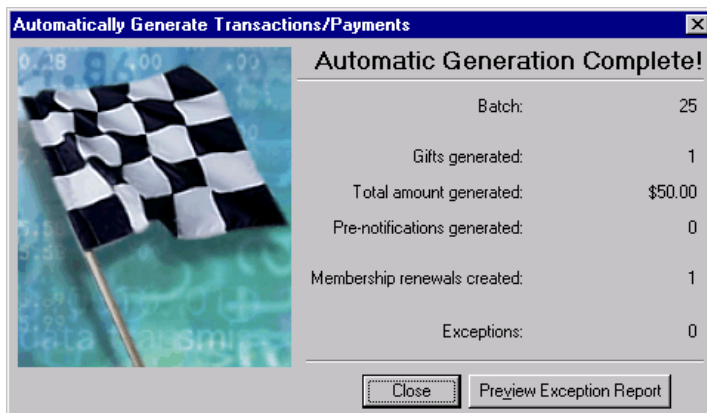
If exceptions are found in a batch, you can click the **Preview Exception Report** button to preview the exceptions found in the batch. When you preview the report, you can print the report directly from the report preview screen.

27. Click **Close**. You return to the Batch Data Entry screen for the gift batch. The generated payments and transactions appear in the grid.

28. You can now commit the batch to the database. For more information about committing gifts to the database, see the *Batch Guide*.

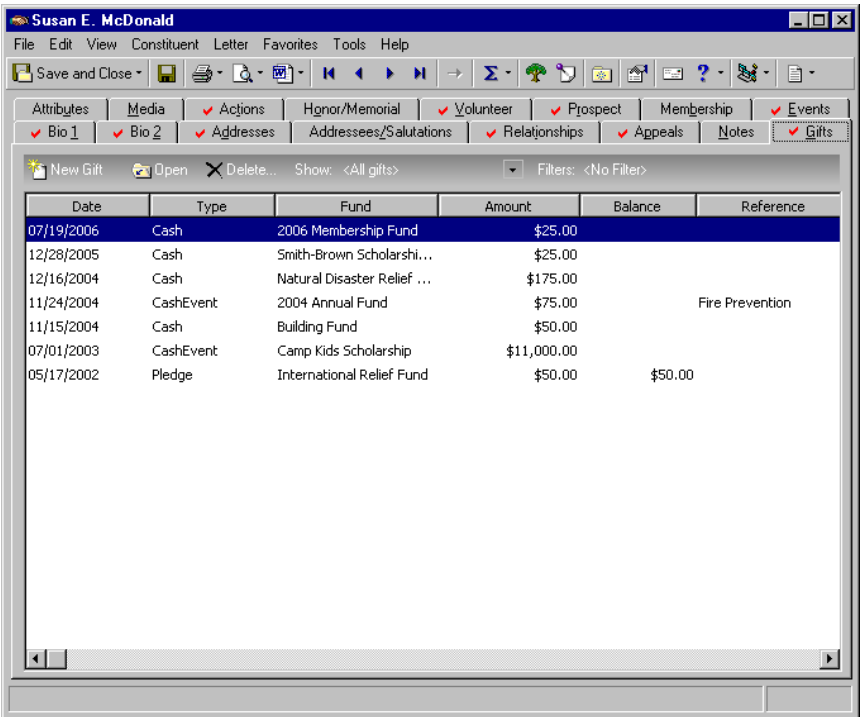# Paying Membership Dues for Another Constituent

When a constituent receives a gift of membership, a constituent other than the member can pay the membership dues. For example, Susan McDonald decides to give her cousin, Jason Campbell, an Individual membership to your organization for his birthday. Although Jason receives the membership, Susan pays the dues. To show that dues have been paid for Jason's membership, you need to link Susan's gift record to Jason's membership record.

▶ **Giving a gift of membership**

Before using this procedure, you need to create a membership record for the constituent receiving the membership. For more information about adding a new membership, see the *Membership Data Entry Guide*.

> ***Scenario:*** Susan McDonald upgraded an Education Program membership for her cousin, Jason Campbell, as a gift for his birthday. You already renewed Jason Campbell's Education Program membership. Now, you need to create a gift record for Susan McDonald and link it to Jason's membership record.

1. From Susan McDonald's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

2. On the action bar, click **New Gift**. The New Gift screen appears.

3. From the New Gift screen, select the Gift tab and add the information about Susan's gift as shown on the screen below. For more information about adding a gift record, see the Gift Records chapter of the *Gift Records Guide*.

Note: If the donor is paying for another person's dues, do not link the gift to the donor's membership record on the Link Gift to Membership screen.

4. To link Susan's gift to Jason's existing membership record, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Membership**. The Link Gift to Membership screen appears.

5. Click **Load Memberships From**. The Open screen appears so you can search for Jason Campbell in your database. When you find and select Jason, his Education Program membership appears in the grid on the Link Gift to Membership screen.

In the **Amount Applied** column for Jason's membership, $450 defaults automatically. When you tab through the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $450.

6. Click **OK**. You return to Susan's gift record.

7. Click **Save and Close** on the toolbar. Susan's gift record is now linked to Jason's Education Program membership.

Breaking the Link Between a Gift and a Membership

On occasion, you may need to break the link between a gift and a membership. For example, a gift may have been linked to the wrong membership. When you break the link, neither the gift nor the membership is deleted from your database. Instead, the gift is not applied toward the dues owed for the membership. For example, you link a gift record of a $100.00 gift to a membership. On the membership record, the **View/Link Gifts** display shows $100.00 has been paid toward this membership. If you break the link between the gift and membership records, the **View/Link Gifts** display shows $0.00 has been paid toward the membership.

▶ **Breaking a link between a gift and a membership**

You can use this procedure to break the link between a gift record and the current membership transaction. However, if a gift is linked to a membership transaction that is not the most recent transaction, you cannot break the link between the gift and membership. Also, if the gift has a post status of Posted, you cannot break the link between gift and membership records. When you break the link, neither the gift nor membership record is deleted from the database. For more information about deleting a membership record, see the *Membership Data Entry Guide*. For more information about deleting a gift record, see the Gift Records chapter of the *Gift Records Guide*.

> *Scenario:* Ginger Rosenberg purchased an Adopt an Animal membership. You created a new membership record for Ginger's membership and linked her gift record of $75 to pay her dues. You now realize Ginger's gift was linked to the membership in error and you need to break the link without deleting the membership or gift record.

1. Open the gift record for Ginger Rosenberg's $75 gift. For more information about opening a gift record, see the Gift Records chapter of the *Gift Records Guide*.

Warning: If the linked transaction is not the current membership, the row in the grid is disabled and you cannot break the link between the gift and membership.

2. From the menu bar, select **Gift**, **Links**. When the submenu appears, select **Membership**. The Link Gift to Membership screen appears.

3. In the **Link?** column, unmark the checkbox in the row containing Ginger's Adopt an Animal membership. The gift amount entered in the **Amount Applied** column disables and the status bar updates to show Ginger's gift has been unapplied from this membership.

Warning: Even though you broke the link between Ginger's gift and membership, you have not deleted Ginger's gift from the database. For more information about deleting a gift, see the Gift Record chapter of the *Gift Records Guide*.

4. Click **OK**. You return to Ginger's gift record.

5. Click **Save and Close** on the toolbar. Ginger's gift record is no longer linked to her Couple membership.

Creating New Membership Transactions from a Gift Record

From a gift record, you can create new memberships and transactions for any constituent in your database. For example, you receive a $50.00 check from a constituent to pay dues for an Individual membership. When you add the gift record, you can also add the new membership directly from the gift record. Then, you can link the gift and membership records to pay the dues for the membership. You can also renew, rejoin, upgrade, or downgrade a membership from the gift record.

Adding a New Membership from a Gift Record

> **Note**: You can also create a new gift record for membership dues when you create a new membership record. For more information, see the *Membership Data Entry Guide*.

Depending on how you add information to your database, it may save you time to create new memberships when you create a gift record for the membership dues. Before you create new memberships, you need to ensure your membership programs and categories are set up properly in *Configuration*. For more information about setting up membership categories and programs, see the Configuration chapter of the *Configuration & Security Guide*.

▶ **Adding a new membership from a gift record**

> ***Scenario:*** Earlier this month, Ellen Crenshaw called Autumn Compton and invited her to join the Friends of the Museum, which is a membership group that helps support your museum. Today, you receive a $50.00 check from Autumn Compton to pay the dues for her new Individual membership to Friends of the Museum. You can create a gift record for Autumn's membership dues and link the gift record to a new Individual membership for the Friends of the Museum.

> **Note**: Before you add new memberships, you must set up membership programs, categories, and subcategories in *Configuration*. For more information about defining programs, categories, and subcategories, see the Configuration chapter of the *Configuration & Security Guide*.

1. From Autumn Compton's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.
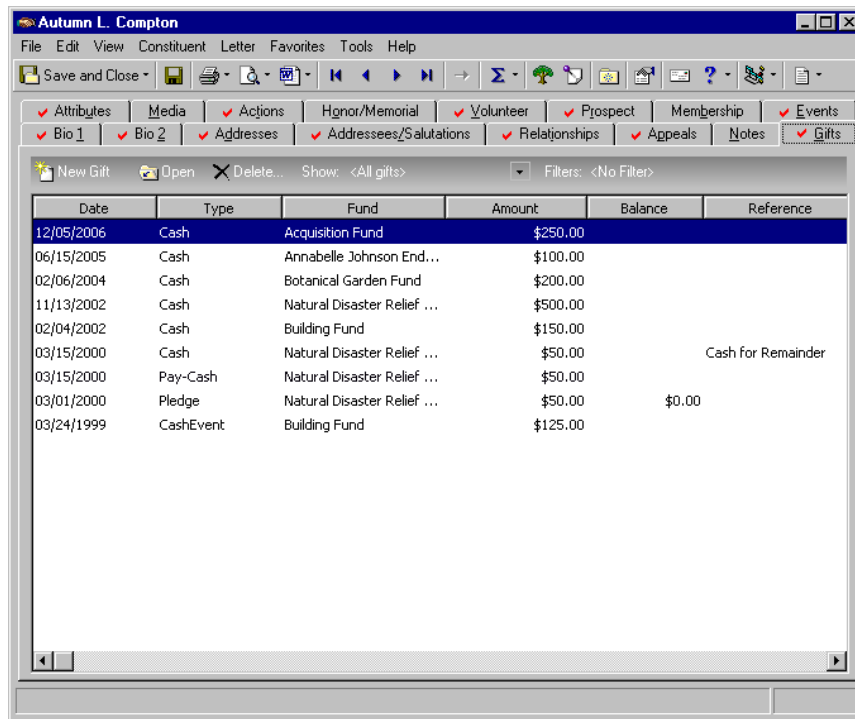
2. On the action bar, click **New Gift**. The New Gift screen appears.

3. From the New Gift screen, select the Gift tab and add the information about Autumn's gift as shown on the screen below. For more information about adding a gift record, see the Gift Records chapter of the *Gift Records Guide*.

4. On the toolbar, click the **Save** button.

Note: The Link Gift to Membership screen displays all current and previous memberships for Autumn. Because the grid does not contain any information, Autumn has never participated in a membership program.

5. From the menu bar, select **Gift**, **Links**. When the submenu appears, select **Membership**. The Link Gift to Membership screen appears.

Warning: If a constituent has entries in the Membership grid and you click **New Membership**, the program warns you that another current membership exists. To add the new membership, click **OK** to continue. If instead you wish to renew, rejoin, upgrade, or downgrade the current membership, click **Cancel** and choose the appropriate option from the action bar.

6. On the action bar, click the **New Membership** arrow. A submenu appears.

7. Select **New Membership** to create a new membership record for Autumn. The New Membership screen appears. You can also open, renew, rejoin, upgrade, or downgrade existing memberships by highlighting a membership in the grid and clicking the appropriate button. Because Autumn is a new member, no existing memberships display in the grid.

Note: The program can automatically create a membership ID when you mark the **When saving records, automatically generate Membership IDs** checkbox on the **Generate IDs** tree view option on the Business Rules screen in *Configuration*.

8. In the **Constituent** field, click the **binoculars** to search using the Open screen, for Autumn Compton's constituent record.

9. In the **Membership ID** field, enter "85-TE". A membership ID is a series of numbers and letters to identify Autumn's membership.

10. In the **Dues** field, the amount $50 defaults automatically. This is the gift amount you entered on the Gift tab of the gift record. Because this is the correct dues amount for an Individual membership to the Friends of the Museum, it is not necessary to change this number.

11. In the **Program** field, select "Friends of the Museum".

12. In the **Category** field, select "Individual".

Note: The program defaults a date into the **Expires** field when you enter a default in the **New memberships expire after** field on the Default Settings tab for the membership category record in *Configuration*.

13. In the **Date joined** field, enter the date 10/01/2005 because you want Autumn's membership to start on the first date of the month.

14. In the **Expires** field, enter the date 10/01/2005 to indicate Autumn's membership expires one year from the date she joined Friends of the Museum.

15. Mark the **Print renewal notices** checkbox because you want to remind Autumn to renew her membership when it is close to expiring.

16. Add Ellen Crenshaw as a solicitor for this membership by clicking the **Solicitors** button. The Solicitors Credited for this Membership screen appears.

17. Click the binoculars to search your database for Ellen Crenshaw. After you locate her record, click **OK** on the Solicitors Credited for this Membership screen to return to the New Membership screen.

18. In the **Reason** field, select "Interested in supporting museum" to explain why Autumn purchased a membership.

Note: Because you are adding a new membership from the Link Membership to Gift screen, you do not need to click the **Link to Gift** button on the membership record to link the gift to the membership.

19. In the **Comments** field, enter "Autumn may be a good prospect for a large donation next year." The comments you enter in this field should pertain to this membership transaction.

20. Select the Attributes/Notes tab to add any attributes or notes about Autumn's membership. For example, you can add an attribute describing the exhibits in which Autumn is interested. For detailed information about adding an attribute, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. You can also add notes, such as "Autumn may be interested in purchasing a lifetime membership next year."

Warning: Because you already added Autumn's membership to the database, her membership is added, regardless of whether you save her gift.

21. Click **OK** after you enter all necessary information on the New Membership screen. A new Individual membership is created for Autumn. You return to the Link Gift to Membership screen. Autumn's new membership appears in the grid and the checkbox in the **Link?** column is marked.

22. Click **OK**. You return to Autumn's gift record.

23. Click **Save and Close** on the toolbar. Autumn's gift record is now linked to her Individual membership.

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