Memberships Guide
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Introduction to Membership Programs

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

There are three types of membership programs.

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

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

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

When you add a membership program, you complete a series of tabs with information about the program. As you make choices and enter information about the program, the tabs and fields change to reflect the information needed for the specific type of program.
How to Set Up an Annual, One-Term Membership Program

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

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

This workflow walks through the setup of an annual, one-term membership program, along with the different tabs and fields you encounter along the way.
Before you begin, consider whether your membership program is going to include any benefits or add-ons, as you can set these up in advance. Benefits include items given to the member when joining at a certain level, such as a key chain or calendar. Add-ons are items members can purchase in addition to the membership, without any impact to the membership level. For example, at any level, you might allow members to purchase an additional member or "plus one" for a guest. For more information, see Membership Benefits on page 12 and Membership Add-ons on page 18. Also consider whether you need to create a membership promotion, such as 20% off, to offer when someone purchases the membership. For more information, see Membership Promotions on page 19.

From Memberships, click Add. The Add a membership program screen appears. The first fields on the screen are for general information about the membership program, such as its name and description. For more information, see General Information about the Membership Program on page 9.

On the General tab, make key choices about the type of membership program you want to set up. This workflow is for an annual, one-term program. However, you can still choose whether membership in the program is based on dues, contributions, or both. This workflow covers all three scenarios. For more information about dues and contributions, see Rules for Dues and Contributions on page 14.

On the Levels tab, set up the levels for your membership program. You need to have at least one level, but you can have multiple levels. For example, you might have a standard level as well as a premium one. When you enter your levels, begin with the lowest or most basic level first.

For dues-based programs, each of your levels has one price. You can also specify the number of members, membership cards, and children allowed for each level.

For contributions-based programs, you set minimum and maximum amounts for each level. The lowest level might be any gift under $50, while other levels may be between $50 and $99, $100 and $249, and so on.

If your program includes both, you specify how people obtain each level—whether it is purchased with dues or awarded with contributions. You then specify the amounts for each level accordingly.

For more information about levels, see Membership Program Levels and Terms on page 10.

On the Levels tab, you can also specify add-ons for dues-based programs or levels. Contributions-based programs and levels do not use add-ons. Any additional benefit is a reason for a member to upgrade to a higher level rather than remain at a lower level and purchase the add-on. For more information about add-ons, see Membership Add-ons on page 18.

On the Benefits tab, select which format to use for your membership cards, along with the name format to use for members. In addition, you can indicate whether any portion of the membership amount is tax deductible. If the membership program has any benefits, you can assign those to levels on this tab. The benefits will be awarded when memberships are added. For more information, see Membership Benefits on page 12.

For a dues-based program, the Dues tab appears. For a contributions-based program, the Contributions tab appears. And if it has both, both tabs appear.

On the Dues tab, you set rules for any membership dues received, including tax deductibility and payment options. In addition, you can specify which promotions, if any, can be used when memberships are purchased. For information on these options, see Rules for Dues-Based Programs and Levels on page 15.
On the Contributions tab, you set rules for any membership contributions received, including the types of giving activity that count toward a membership and what happens if someone gives more than the amount specified for a level. You also specify when the contributions-based membership expires. For information on these options, see Rules for Contributions-Based Programs and Levels on page 15.

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

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

Then on the Renewals tab for dues- and contributions-based programs, you set up the renewal window and determine how members’ statuses change based on where they are in the window. For information about renewals, see Manage Renewal Information for Membership Programs on page 17.

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

How to Set Up an Annual Membership Program with Multiple Terms

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

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

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

Before you begin, consider whether your membership program is going to include any benefits or add-ons, as you can set these up in advance. Benefits include items given to the member when joining at a certain level, such as a key chain or calendar. Add-ons are items members can purchase in addition to the membership, without any impact to the membership level. For example, at any level, you might allow members to purchase an additional member or "plus one" for a guest. For more information, see Membership Benefits on page 12 and Membership Add-ons on page 18. Also consider whether you need to create a membership
promotion, such as 20% off, to offer when someone purchases the membership. For more information, see Membership Promotions on page 19.

- From Memberships, click Add. The Add a membership program screen appears. The first fields on the screen are for general information about the membership program, such as its name and description. For more information, see General Information about the Membership Program on page 9.

- On the General tab, make key choices about the type of membership program you want to set up. This workflow is for an annual program with multiple terms. However, you can still choose whether membership in the program is based on dues, contributions, or both. This workflow covers all three scenarios. For more information about dues and contributions, see Rules for Dues and Contributions on page 14.

- On the Terms and Levels tab, enter the terms for the program. Terms can be based on a number of months or years. Then set up the levels for the program. You need to have at least one level, but you can have multiple levels. For example, you might have a standard level as well as a premium one. When you enter your levels, begin with the lowest or most basic level first.

  For more information about levels, see Membership Program Levels and Terms on page 10.

- For dues-based programs, the Prices tab appears. Each of your levels has one price and you can also specify the number of members, membership cards, and children allowed for each level.

  For contributions-based programs, the Price Ranges tab appears. You set minimum and maximum amounts for each level. The lowest level might be any gift under $50, while other levels may be between $50 and $99, $100 and $249, and so on.

  If your program includes both, you specify how people obtain each level—whether it is purchased with dues or awarded with contributions. You then specify the amounts for each level accordingly.

- On the Prices or Price Ranges tab, you can also specify add-ons for dues-based programs or levels.

  Contributions-based programs and levels do not use add-ons. Any additional benefit is a reason for a member to upgrade to a higher level rather than remain at a lower level and purchase the add-on. For more information about add-ons, see Membership Add-ons on page 18.

- On the Benefits tab, select which format to use for your membership cards, along with the name format to use for members. In addition, you can indicate whether any portion of the membership amount is tax deductible. If the membership program has any benefits, you can assign those to levels on this tab. The benefits will be awarded when memberships are added. For more information, see Membership Benefits on page 12.

- For a dues-based program, the Dues tab appears. For a contributions-based program, the Contributions tab appears. And if it has both, both tabs appear.

  On the Dues tab, you set rules for any membership dues received, including tax deductibility and payment options. In addition, you can specify which promotions, if any, can be used when memberships are purchased. For information on these options, see Rules for Dues-Based Programs and Levels on page 15.

  On the Contributions tab, you set rules for any membership contributions received, including the types of giving activity that count toward a membership and what happens if someone gives more than the amount specified for a level. You also specify when the contributions-based membership expires. For information on these options, see Rules for Contributions-Based Programs and Levels on page 15.
On the Renewals tab for a dues-based program, specify whether the membership term varies based on the start date of the membership or based on a fixed date such as a calendar year. You also specify when dues-based levels expire.

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

Then on the Renewals tab for dues- and contributions-based programs, you set up the renewal window and determine how members' statuses change based on where they are in the window. For information about renewals, see Manage Renewal Information for Membership Programs on page 17.

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

## How to Set Up a Recurring or Lifetime Membership Program

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

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

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

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

Before you begin, consider whether your membership program is going to include any benefits or add-ons, as you can set these up in advance. Benefits include items given to the member when joining at a certain level, such as a key chain or calendar. Add-ons are items members can purchase in addition to the membership, without any impact to the membership level. For example, at any level, you might allow members to purchase an additional member or "plus one" for a guest. For more information, see Membership Benefits on page 12 and Membership Add-ons on page 18. Also consider whether you need to create a membership promotion, such as 20% off, to offer when someone purchases the membership. For more information, see Membership Promotions on page 19.

From **Memberships**, click **Add**. The Add a membership program screen appears. The first fields on the screen are for general information about the membership program, such as its name and description. For more information, see General Information about the Membership Program on page 9.
On the General tab, make key choices about the type of membership program you want to set up. This workflow is for a recurring or lifetime program. These programs must be dues-based only. For more information about dues, see Rules for Dues and Contributions on page 14.

On the Payment Options/Levels tab, enter the payment options for the membership program.

Recurring programs can have payment options of annually, semi-annually, quarterly, and monthly.

Next, on the Payment Options/Levels tab, set up the levels for the program. You need to have at least one level, but you can have multiple levels. For example, you might have a standard level as well as a premium one. When you enter your levels, begin with the lowest or most basic level first.

For more information about levels, see Membership Program Levels and Terms on page 10.

For recurring and lifetime programs, the Prices tab appears. Each payment option and level has a price.

For a recurring program with two levels and payment options of annually and quarterly, you set annual and quarterly-based prices for each level. For example, you might qualify for a recurring membership if you make quarterly payments of $150 or slightly discounted annual payments of $500.

For a program with two levels and payment options of five yearly payments and pay in full, you set the yearly payment amount to be paid in five installments as well as the price if the membership is paid in full. For example, you might qualify for a lifetime membership if you make five yearly payments of $150 or if you make a one-time payment of $500.

On the Prices tab, you can also specify add-ons. Add-ons are items members can purchase in addition to the membership, without any impact to the membership level. For more information, see Membership Add-ons on page 18.

On the Benefits tab, select which format to use for your membership cards, along with the name format to use for members. In addition, you can indicate whether any portion of the membership amount is tax deductible. If the membership program has any benefits, you can assign those to levels on this tab. The benefits will be awarded when memberships are added. For more information, see Membership Benefits on page 12.

On the Dues tab, you set rules for any membership dues received, including tax deductibility and payment options. In addition, you can specify which promotions, if any, can be used when memberships are purchased. For information on these options, see Rules for Dues-Based Programs and Levels on page 15.

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

How to Set Up a Program for Memberships with Revenue in Another System

Some membership programs in your organization may be managed and have revenue tracked in other systems, but you may still be interested in information about members for the other program. For example, a university’s alumni association may be interested to see that one of its members is also a member of an athletic booster
program. In this situation, you can set up the athletic booster program as a membership program in which payments are made in another system. For these programs, you set up and can track basic information about the membership, but not things like benefits or add-ons.

This workflow walks through the setup of a membership program whose payments are made in another system, along with the different tabs and fields you encounter along the way.

- **From Memberships**, click **Add**. The Add a membership program screen appears. The first fields on the screen are for general information about the membership program, such as its name and description. You also specify that payments for this membership program are made in another system. For more information, see General Information about the Membership Program on page 9.

- **On the General tab**, make key choices about the type of membership program you want to set up, such as whether it is annual, recurring, or lifetime. You also choose whether membership in the program is based on dues, contributions, or both. For programs with payments in another system, you make these selections, but you won’t actually set up the rules for membership dues or contributions.

- **For annual programs**, on the Levels tab, set up the levels for your membership program. You need to have at least one level, but you can have multiple levels. For example, you might have a standard level as well as a premium one. When you enter your levels, begin with the lowest or most basic level first.

  For dues-based programs, each of your levels has one price. You can also specify the number of members, membership cards, and children allowed for each level.

  For contributions-based programs, you set minimum and maximum amounts for each level. The lowest level might be any gift under $50, while other levels may be between $50 and $99, $100 and $249, and so on.

  If your program includes both, you specify how people obtain each level—whether it is purchased with dues or awarded with contributions. You then specify the amounts for each level accordingly.

  For recurring or lifetime programs, on the Payment Options/Levels tab, enter the payment options for the membership program. On the Prices tab, you can enter a price for each payment option and level.

- **Note:** Pricing information is for informational purposes only. When you add memberships, you will not enter revenue for memberships in this program.

  For more information about levels, see Membership Program Levels and Terms on page 10.

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

  Then on the Renewals tab for dues- and contributions-based programs, you set up the renewal window and determine how members’ statuses change based on where they are in the window. For information about renewals, see Manage Renewal Information for Membership Programs on page 17.

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

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

You can run the Update Membership Status global change to go through your membership programs and update the members' statuses automatically based on the rules for the renewal window for the programs. For more information, see Manage Renewal Information for Membership Programs on page 17.

General Information about the Membership Program

When you set up a membership program, you indicate whether it is an annual, recurring, or lifetime program. You also indicate whether it is dues-based, contributions-based, or both. Once saved, you cannot edit these settings for the program. On the General tab on the membership program view, you can edit other information about the program, such as its name and description.
If a membership program has payments tracked in another system, you can specify that on the General tab when you set up the program. Once saved, you cannot edit this setting. For example, a university's alumni association may be interested to see that one of their members is also a member of an athletic booster program. In this situation, you can set up the athletic booster program as a membership program in which payments are made in another system. For more information, see How to Set Up a Program for Memberships with Revenue in Another System on page 7.

In addition to basic information about the program, you can view two widgets on the General tab: Membership Activity and Membership Revenue. Membership Activity compares joins and renewals over two time periods, such as this month compared to this month last year. Membership Revenue compares the revenue of membership levels over two time periods. A maximum of five levels are displayed. If there are more than five levels, the five levels with the most revenue are displayed. Add-on revenue is included. These widgets are based on data from the data warehouse. Information about when the data was last updated is displayed below the widgets.

For information about the different types of programs, as well as how to set them up, see Introduction to Membership Programs on page 1.

## Edit General Membership Program Information

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

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

If a membership program has payments tracked in another system, you can specify that on the General tab when you set up the program. Once saved, you cannot edit this setting.

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

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>This is the name of membership program, such as &quot;Adopt an Animal&quot; or &quot;Alumni Association.&quot;</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the membership program to include additional information and details about the program.</td>
</tr>
<tr>
<td>Category</td>
<td>Select a category for the program, such as &quot;Museum&quot; or &quot;Alumni Association.&quot; This can help you analyze membership programs based on category.</td>
</tr>
<tr>
<td>Site</td>
<td>If your organization uses sites, you can select a site to associate with the program.</td>
</tr>
<tr>
<td>Allow multiple memberships</td>
<td>If a constituent can join the membership program more than one time, select this checkbox.</td>
</tr>
</tbody>
</table>

## Membership Program Levels and Terms

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

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

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

**Note:** Add-ons are not available if the membership program is set up to have payments tracked in another system. For more information, see How to Set Up a Program for Memberships with Revenue in Another System on page 7.

- For annual, single-term programs, a Levels tab appears. For each level, you enter a name and description. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions. With dues-based programs, you can also manage add-ons from this tab. For more information, see Associate Add-ons with a Membership Program on page 19.

- For annual, multiple-term programs, a Terms and Levels tab appears. You specify the terms for the program, such as one year or three years. For each level, you enter a name and description. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions.

- For recurring and lifetime programs, a Payment Options/Levels tab appears. For each level, you enter a name, description, and price. For information about payment options, see Payment Options for Membership Programs on page 22.

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

Membership types can be used to further classify membership levels. For more information, see Membership Types on page 12.

### Manage Membership Program Levels and Terms

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

- For annual, single-term programs, a Levels tab appears. For each level, you enter a name and description. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions. With dues-based programs, you can also manage add-ons from this tab. For more information, see Associate Add-ons with a Membership Program on page 19. To edit the levels of this type of a program, go to **Memberships** and click the membership program. On the membership program page, select the Levels tab and click **Edit**. When you edit levels, you can also mark which ones are active.

- For annual, multiple-term programs, a Terms and Levels tab appears. You specify the terms for the membership program, such as one year or three years. For each level, you enter a name and description. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions. To edit the levels of this type of a program, go to **Memberships** and click the membership program. On the membership program page, select the Terms and Levels tab and click **Edit**. When you edit terms and levels, you can also mark which ones are active.

- For recurring and lifetime programs, a Payment Options/Levels tab appears. For each level, you enter a
name, description, and price. For information about payment options, see Payment Options for Membership Programs on page 22. To edit the levels of this type of a program, go to Memberships and click the membership program. On the membership program page, select the Terms and Levels tab and click Edit. When you edit levels, you can also mark which ones are active.

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

To edit pricing information, see Manage Prices or Price Ranges on page 14.

Membership Types can be used to further classify membership levels. For more information, see Membership Types on page 12.

### Membership Types

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

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

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

### Membership Benefits

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

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

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

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

On the Benefits tab, you can select which card format to use for membership cards for the program. You can also select which name format to use for the membership cards. In addition, you specify whether all of the amount, part of the amount, or none of the amount of membership dues is tax-deductible.
**Note:** Add-ons and benefits are similar. Benefits are things like items members automatically receive with their memberships or membership levels. Add-ons are optional offerings members can "add on" to their membership, for an additional cost or not depending on the item.

## Manage Benefits for Membership Programs

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

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

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

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Card format</td>
<td>Select the card format to use for membership cards for the program. The card format determines which card template to use when you print membership cards. To edit the format for a membership card, you must use the report model for the card in <em>Analysis</em>. Under <em>Reporting services</em>, click <em>Report explorer</em>. Under <em>System Reports, Membership, Card Formats</em>, open the card format. For information about the card formats, see <em>Membership Card Formats</em> on page 72.</td>
</tr>
<tr>
<td>Name format</td>
<td>Select the name format option to use to determine how names appear on membership cards. Name format options are configured in <em>Marketing and Communications</em>.</td>
</tr>
<tr>
<td>Is a portion of the membership dues considered tax deductible?</td>
<td>Select which portion (all, some, or none) of the membership dues is considered tax-deductible.</td>
</tr>
<tr>
<td>Benefits grid</td>
<td>Your membership levels appear in the order you added them. We recommend you add your levels beginning with lowest or most basic level first. You can assign benefits to each level of the program. For the first level, click under <em>Benefit</em> in the grid and select a benefit. Under <em>Quantity</em>, select whether to base the quantity of the benefit on the number of members or a specific number. For example, if a level allows two members, each member may get a key chain; however, only one magazine subscription is allowed. If the quantity is set to a specific number, enter the number under <em>Number to offer</em>. If the quantity is based on the number of members, the number defaults to the number of members allowed for the level and cannot be changed. Under <em>Frequency</em>, select whether the benefit should be issued with every renewal or just the first time the member joins. For example, some benefits, such as a welcome kit, may be issued only once. If your benefits accumulate, you can click <em>Include the benefits from the previous level</em>. This automatically copies the benefits from the previous level to the current level. You can then edit them as needed. To remove a benefit, select its row and press <em>DELETE</em> on your keyboard.</td>
</tr>
</tbody>
</table>

## Membership Program Prices or Price Ranges

Some membership programs use prices or price ranges instead of a set amount per level. Information about prices varies based on the type of membership program.
For annual, single-term programs, you set a price for each membership level. If the program is dues-based, you set a price for each level. If it is contributions-based, you set the price range for each level. If the program is both dues- and contributions-based, you can base some levels on dues and others on contributions. These programs do not have a separate Prices or Price Ranges tabs.

For annual, dues-based multiple-term programs and for recurring or lifetime giving programs, a Prices tab appears. Each level is listed in the prices grid, along with columns for each term. You enter the price for each level and term. For these programs, you can also manage add-ons from this tab. For more information, see Associate Add-ons with a Membership Program on page 19.

For annual, multiple-term programs that are contributions-based or both dues- and contributions-based, a Price Ranges tab appears. Each level is listed in the grid, along with two columns for each term—one column for the smallest gift amount and one for the largest gift amount. These are the gift amount ranges to qualify for each level and term. Contributions-based programs do not use add-ons, but if the program is both dues- and contributions-based, you can manage add-ons from this tab as well. For more information, see Associate Add-ons with a Membership Program on page 19.

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

### Manage Prices or Price Ranges

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

- Annual, single-term programs do not have a Prices tab or a Price Ranges tab. For these types of programs, prices are set up on the Levels tab.

- For annual, dues-based multiple-term programs and for recurring or lifetime giving programs, a Prices tab appears. Each level is listed in the prices grid, along with columns for each term. You enter the price for each level and term. For these programs, you can also manage add-ons from this tab. For more information, see Associate Add-ons with a Membership Program on page 19.

- For annual, multiple-term programs that are contributions-based or both dues- and contributions-based, a Price Ranges tab appears. Each level is listed in the grid, along with two columns for each term—one column for the smallest gift amount and one for the largest gift amount. These are the gift amount ranges to qualify for each level and term. Contributions-based programs do not use add-ons, but if the program is both dues- and contributions-based, you can manage add-ons from this tab as well. For more information, see Associate Add-ons with a Membership Program on page 19.

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

To edit level or term information, see Manage Membership Program Levels and Terms on page 11.

### Rules for Dues and Contributions

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

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

Rules for Dues-Based Programs and Levels

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

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

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

For dues-based programs, you can also select which promotions can be used. Promotions are discounts that can be applied against a membership purchase or payment to reduce the total amount owed. For example, a membership program might have a student discount, as well as a $5 off promotion. Available promotions can be applied when the membership is sold or entered. For more information about promotions, see Membership Promotions on page 19.

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

For information about payment options, see Payment Options for Membership Programs on page 22.

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

Rules for Contributions-Based Programs and Levels

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

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

To manage rules for contributions for membership programs that use them, select the Contributions tab on the Add a membership program screen. Or, from Memberships, click a membership program to go to the program page and select the Rules tab.
<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>What types of giving activity are counted toward a membership?</td>
<td>Select what types of revenue transactions count toward a membership. Payments for donations, pledges, recurring, and planned gifts: Select this to include activity for any designation, specific designations, or one specific designation. Pledges: Select this if pledges (not pledge payments) count. Recurring gifts: Select this if recurring gift payments count. Event registration payments: Select this if paid event registrations count. You can include registration payments for any events or for events in a specified category. Membership dues payments: Select this if membership dues payments count. You can include dues payments in any membership program or in a specified program.</td>
</tr>
<tr>
<td>Can multiple revenue transactions count toward a membership?</td>
<td>If a single transaction on its own is the only way to qualify for a contributions-based level, select No, only a single revenue transaction counts. If you have a contributions-based level in a program for giving between $1000 and $5000, a donor with five $500 transactions (even within a single term of the program) does not qualify. If the five $500 transactions given within the term of the program would qualify, select Yes, the combined amounts of multiple revenue transactions count.</td>
</tr>
<tr>
<td>What happens if they give more?</td>
<td>Money given during the renewal window automatically counts toward a renewal. If a gift large enough for an upgrade is given before the renewal window, you specify how to count it. You can count the money as additional revenue, toward an upgrade, or toward a renewal. Gifts not large enough for an upgrade that are given before the renewal window are treated as additional revenue.</td>
</tr>
<tr>
<td>When does the membership expire?</td>
<td>For contributions-based memberships, define the date(s) used to determine when the memberships expire. Select The transaction date of the gift to set the membership to expire after the gift date plus the length of the term. A one-year term membership awarded based on a gift date of the first of March would expire one year later. Select The last day of the month the gift was received to set the membership to expire on the last day of the month after the gift date plus the length of the term. A one-year term membership awarded based on a gift date of the first of March would expire at the end of March one year later. Select Specific dates to enter specific start, end, and expiration dates.</td>
</tr>
</tbody>
</table>

Membership Campaigns

With campaigns, your organization can make planned efforts to raise money for specific programs or causes. After you add a membership program, you can associate campaigns with it on the Rules tab. On the Rules tab, click Edit campaigns. By default, the campaign will be associated with any membership revenue for the program.

Membership Program Renewals

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

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

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

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

You can run the Update Membership Status global change to go through your membership programs and update the members' statuses automatically based on the rules for the renewal window for the programs. For more information, see Manage Renewal Information for Membership Programs on page 17.

Manage Renewal Information for Membership Programs

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

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

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

Note: We recommend you set up the Update membership status global change process to run on a regular basis (nightly or weekly) to keep these statuses up to date. If your membership programs expire only on a monthly, quarterly, or yearly basis and all memberships expire at the same time, you can run the process less frequently.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership term</td>
<td>Select how the membership term is calculated for dues-based memberships. The term is either fixed (such as based on a calendar year) or can vary according to the membership start date (such as based on a rolling year).</td>
</tr>
<tr>
<td>When a member joins a dues-based level, set the expiration date to</td>
<td>Select Same day as transaction date if the membership should expire on the same date as the transaction, according to however the membership term is defined. For example, if a constituent buys a membership with a one-year term on the first of December, the membership expires on the first of December the following year. Select End of month to give members a little extra time before their memberships expire. For the same example, if a constituent buys a membership with a one-year term on the first of December, the membership expires at the end of December the following year. When you select End of month, you can also indicate the membership should expire at the end of the prior month. When you select this, you set the day of the month to use. For example, you could set the membership to expire at the end of the prior month when starting before day 2 of the month. If a member joins on the first of December, rather than giving the member 13 months for a one-year term, you might set the membership to expire at the end of the following November instead, which would be exactly 12 months. If the member joined on the second (or later) of December, the membership expires at the end of December the following year. You can also select Is fixed and set a date when all dues-based memberships for the program expire. If selected, you must enter a date. To expire the memberships for the program on the same day and month every year, select Is fixed and enter the month and day in the Expiration date column. In the Push to next</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Before the expiration date</strong></td>
<td><strong>Period after</strong> column, enter the membership join date that extends the membership until the next expiration date. For example, you enter 12/31 in the <strong>Expiration date</strong> column. If you enter 09/01 in the <strong>Push to next period after</strong> column, the expiration date for a constituent who joins on or after September 1 is December 31 of the following year, not the current year. You can enter multiple rows of dates in this grid if you want to expire and push multiple dates throughout the year.</td>
</tr>
<tr>
<td><strong>Before the expiration date</strong></td>
<td>Set rules for when the renewal begins and whether memberships can be set up to renew automatically. For dues-based programs, when a membership is in the renewal window, the membership page for the constituent has a <strong>Renew now</strong> button. Prior to the renewal window, this button is <strong>Upgrade now</strong> and is used for a mid-term upgrade of the membership. For contributions-based programs, the Membership contribution process uses the renewal window to determine when existing members are eligible for a renewal. In <strong>Renewal window starts</strong>, select how many months before the expiration date (0 to 12) or select &quot;at start of membership.&quot; The renewal window options are the same regardless of the length of the terms. For members who are set to renew automatically, you can set the renewal process to take place 1-31 days or 1-12 months before the expiration date. Or you can set the renewal process to take place on a specific day of the month the membership expires. You can also specify whether members can renew automatically.</td>
</tr>
<tr>
<td><strong>After the expiration date</strong></td>
<td>Define when the renewal window for the membership program ends. You can set it to end 0-12 months after the membership expires. If this is set to zero months after expiration, the renewal window ends when the membership expires. If the renewal window ends 1-12 months after expiration (as opposed to zero months), revenue received during that window counts toward a renewal of the membership. You can then set rules for when membership statuses should change for members whose memberships have expired, but are still within the renewal window. You can set status changes for each month until the renewal window is closed. For example, if the renewal window ends three months after the membership is expired, you might keep a member &quot;Active&quot; during the first month, &quot;Grace&quot; during the second month, and &quot;Lapsed&quot; during the third month after expiration.</td>
</tr>
<tr>
<td><strong>After the renewal window</strong></td>
<td>Specify how to count revenue from a member after the renewal window closes. It can count toward a rejoin of the previous membership or toward a new membership. You must also specify the status for members after the renewal window closes. For example, after the renewal window closes and a member does not renew, you might consider those members &quot;Expired.&quot;</td>
</tr>
</tbody>
</table>

## Membership Add-ons

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

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

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

1. Add a membership program add-on

   1. From **Memberships**, click **Add-ons** under **Configuration**. The Add-ons page appears.
2. On the Add-ons page, click Add. The Add an add-on screen appears.
3. Enter the name of the add-on, such as "Parking pass" or "Additional member."
4. In Add-on type, select whether the add-on is a benefit or an additional member. If you use the type "Additional member," when you add a membership for a constituent and select that add-on, you can select an additional constituent to add to the membership.
   
   **Note:** An add-on used as an additional member does not change the number of cards allowed for the membership.
5. Click Save. You return to the Add-ons page. The new add-on is available to associate with a membership program.

▷ **Edit an add-on**

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

▷ **Delete an add-on**

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

### Associate Add-ons with a Membership Program

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

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

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

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

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

### Membership Promotions

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

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

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

**Configure Membership Promotions**

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

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

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

- **Add membership promotions**
  1. From the Membership Promotions page, click **Add**. The Add a membership promotion screen appears.

    ![Add a membership promotion](image)

    - Enter a name and description for the membership promotion such as to explain what the promotion offers.
    - In the **Application type** field, select whether the discount should be applied manually or with the entry of a promotional code.
      - If you select **With code**, a grid appears to enter the promotion code and the dates the code is valid. If you do not select any dates, the code is always valid.
4. In the **Promotion type** field, select whether the promotion will provide a discount on the price of the membership or a term extension for the membership.

5. If you select **Discount**, select whether the discount should be calculated as a dollar amount off of the price of the membership, or as a percentage. Then enter the dollar amount or percentage.
   If you select **Term extension**, enter the number of months by which to extend the membership term.

6. Click **Save**. You return to the Membership Promotions page.

### Edit membership promotions

1. From the Membership Promotions page, select a promotion to edit and click **Edit**. The Edit membership promotion screen appears.

2. If needed, edit the name and description for the membership promotion to explain what the promotion offers.

3. In the **Application type** field, select whether the discount should be applied manually, or with the entry of a promotional code.
   If you select **With code**, a grid appears to enter the promotion code and the dates the code is valid. If you do not select any dates, the code is always valid.

4. In the **Promotion type** field, select whether the promotion will provide a discount on the price of the membership or a term extension for the membership.

5. If you select **Discount**, select whether the discount should be calculated as a dollar amount off of the price of the membership, or as a percentage. Then enter the dollar amount or percentage.
   If you select **Term extension**, enter the number of months by which to extend the membership term.

6. Click **Save**. You return to the Membership Promotions page.

### Delete membership promotions

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

## Edit Membership Promotion Codes

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

### Edit membership promotion codes

1. From the Membership Promotions page, select a promotion configured to be applied with promotion codes and click **Edit**. The Edit membership promotion screen appears.

2. In the **Code** column of the grid, you can enter a new promotional code or edit an existing code. These are the actual codes that will need to be entered to apply the discounts.

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

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

4. Click **Save**. You return to the membership promotion record.
Mark Membership Promotions as Inactive

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

You can access the Membership Promotions page from **Memberships**.

Manage Membership Promotions

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

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

Payment Options for Membership Programs

You specify the payment options for the program. Payment options include the payment schedule, such as yearly or monthly. For lifetime programs, you also enter the number of payments for each payment option. Recurring programs do not have a set number of payments.

For annual, dues-based and dues- and contributions-based programs, these options appear on the Dues tab. After the program has been created, these options appear on the Rules tab.

For recurring and lifetime programs, these options appear on the Payment Options/Levels tab.

**Note:** For recurring programs, recurring gifts are created. For lifetime programs with payment options other than pay in full, a revenue transaction type of Membership installment plan is used. Membership installment plans are also used for any program that can be pledged. For more information, see Membership Installment Plans on page 22.

Membership Installment Plans

For recurring programs and for lifetime programs with payment options other than pay in full, a revenue transaction type of Membership installment plan is used. Membership installment plans are also used for any program that can be pledged.

Membership installment plans are similar to pledges but are not technically pledges. Unlike pledge revenue, revenue from membership installment plans is not always bookable. There is a setting on the membership program which determines whether the plans themselves are bookable. The plan transactions are also mapped separately to the ledger.

**Note:** In order to post membership installment plans and payments to membership installment plans to the ledger, the necessary mappings must be set up in Administration. Your business or accounting office can help you determine whether membership installment plans should post to the ledger or if only payments for the plans should post. This determination will answer the "Do you post membership installment plans to GL" question on the membership program.
For programs which allow membership installment plans for payments, you set up the installment plan when you add members. For a lifetime program with a "five annual payments" option, the default installment plan would be set up with five annual payments. You can modify the installment plan schedule if needed.

**Tip:** If you have an irregular installment schedule that is similar to one of the "regular" schedules (such as annually, quarterly, or monthly), you can select the regular frequency first. The payment schedule and amounts default according to the frequency you select. You can then modify the dates and amounts to meet your needs. For example, if you want a 12-month installment plan with a first payment of $50 and subsequent monthly payments of $5, you can first select a frequency of monthly. The 12 monthly installment dates and amounts will default into the schedule with the amounts evenly divided. You can then easily modify the amounts to reflect your payments.

### Membership Contribution Processes

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

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

**Note:** We recommend you set up the Membership contribution process to run on a regular basis (nightly or weekly) to keep these memberships in contributions-based programs or levels up to date.

### Manage Membership Contribution Processes

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

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

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

- Delete a membership contribution process

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

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

Tabs of a Process Status Page

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

**Recent Status Tab**

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

**History Tab**

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

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

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

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

- **Delete a status record from the History tab**

  1. On the History tab of the process status page, click the double arrows beside a status record and click Delete. A confirmation message appears.
Note: You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the Status field, and click Apply. Only completed instances appear in the grid.

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

Job Schedules Tab (Not Available on All Process Pages)

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

Schedule Process Jobs

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

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

Create Job Screen

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

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

2. In the Job name field, enter a name for the scheduled process.

3. By default, the schedule is active. To suspend it, clear the Enabled checkbox.

4. In the Schedule type field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever SQL Server Agent service starts; or whenever the computer is idle according to SQL Server Agent. Your selection determines which other fields are enabled.
   a. For a process that runs once, select the date and time to run it.
   b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or...
months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.

c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

5. To return to the Job schedules tab, click **Save**.

**Edit Job Schedules**

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

- **Edit a job schedule**

  1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to **Create Job Screen** on page 25.

  2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.

  3. Click **Save**. You return to the Job schedules tab.

**Delete Job Schedules**

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

- **Delete a job schedule**

  1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.

  2. Click **Yes**. You return to the Job schedules tab.

**Start Process**

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

**Generate Windows Scripting File**

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements. To create a scripting file, click **Generate WSF** under **Tasks**. Your browser prompts you to open or save the file.

- **Generate a Windows Scripting File**

  1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.

  2. Your browser prompts you to open or save the file. To save the file, choose the file location.

**Note:** The download process varies according to the browser you use.
Membership Renewal Notices

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

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

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

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

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

View Packages

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

View Letters

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

Process Membership Renewal Notices

After you have set up membership renewal notices, run the membership renewal notices process to generate the
renewal notices. When you run the membership renewal notices process, the program prepares renewal notices
for constituents whose memberships will expire in the time intervals specified when you set up the membership
renewal notices. For information about how to set up membership renewal notices, see Membership Renewal
Notices on page 28.

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

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

Start a Membership Renewal Notice Process

When you run the membership renewal notices process, the program prepares membership renewal notices for
constituents whose memberships will expire in the time intervals specified when you set up the membership
renewal notices. For information about how to set up membership renewal notices, see Membership Renewal
Notices on page 28.

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

- Process membership renewal notices
  1. From a membership program record, click Process membership renewal notices under Renewal
     Notices. The Process membership renewal notices screen appears.
  2. By default, membership renewal notices are associated with the current membership program. To select
     a different appeal, click the magnifying glass.
     - To create an appeal to associate with membership renewal notices, select Add a new appeal and
       enter an appeal name and description.
• Click Start. The membership renewal process begins, and the Membership Renewal Notices Status page appears. For information about the Membership Renewal Notices Status page, see Membership Renewal Notices Process Status on page 30.

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

### Membership Renewal Notices Process Status

When you start a membership renewal notice process, the program creates a status page of the process. While you run the membership renewal notices process, you can monitor it on the Membership Renewal Notices Status page. This page automatically appears after you start the membership renewal notices process. For information about how to start the membership renewal notices process, see Process Membership Renewal Notices on page 29.

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

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

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

### Merge, Download, or Email Membership Renewal Notices

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

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

Each time you run a membership renewal notices process, the program prepares a renewal notice for constituents who meet the membership expiration criteria selected when renewal notices were set up. For information about how to set up membership renewal notices, see Membership Renewal Notices on page 28.

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

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

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

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

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

2. Click Merge. If there are multiple letters, the Merge multiple letters screen appears. Otherwise, a download screen appears so you can make any necessary changes before you send them to constituents.

3. By default, all of the letters are selected. If you do not want to merge one of the letters, clear its checkbox.

4. Click Merge. A download screen appears so you can make any necessary changes before you send them to constituents.

Download membership renewal notices

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

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

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

2. Click Download output. Select Mail or Email to specify the packages to download renewal notices for. The Save As screen appears.

3. Browse to the location on the workstation or network to save the membership renewal notices .csv file.

4. In the File name field, enter the name of the membership renewal notices .csv file to create.

5. Click Save. The program generates the membership renewal notices in a .csv file. A confirmation message displays the location of the .csv file and asks whether to display the file. You can send the file to a third party to print and send membership renewal notices to constituents.

Email membership renewal notices

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

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

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

2. Click Start email job. The Start email job screen appears.
3. The current date and time of day automatically appear in the Start date and Time fields. To set a specific time for your email job to start, select a different start date and time.

4. In the grid, the email packages that will be sent to constituents appear. To exclude an email package, clear the corresponding checkbox.

5. Click Start. You return to the Membership Renewal Notices Status page.

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

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

Constituent Memberships

If a constituent is a member of a membership program, you can view those programs on the Memberships tab of the constituent record. From the Memberships tab, click on the name of a membership program and you see the membership program page. From the Memberships tab, you can also click Add to add a membership for the constituent. For more information about how to add a membership to a constituent, see Membership Dues on page 43.

Memberships Page

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

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

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

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

If the constituent paid with a credit or debit card and wanted the membership to automatically renew, the Flagged for auto-renew icon appears in the main summary section.
Note: You can send renewal notices as appeals from the Mailings tab in the Appeals task in Marketing and Communications.

Summary Section for a Constituent Membership

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

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

You can run the Update Membership Status global change to go through your membership programs and update the members' statuses automatically based on the rules for the renewal window for the programs. For more information, see Manage Renewal Information for Membership Programs on page 17.

If a membership program has payments tracked in another system, revenue-related information and tasks, such as Total payments made or the Make a payment task, are not available.

From this summary panel, you can click:

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

Primary Member and Constituencies

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

You can also view the member's constituencies in the Additional details section. If you click Communication preferences, you go to the Preferences tab on the constituent's Communications page.
Lifetime Information Section
On a constituent membership page, you can view a Lifetime information section which includes the total membership amount and the last renewal.

If a membership program has payments tracked in another system, information about the number of transactions for the lifetime membership is not available.

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

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

- Issue New Membership Card on page 40
- Print Membership Cards on page 65
- Clear Membership Card Print Status on page 40
- Assign Membership Card Number on page 40
- Edit Membership Card on page 40
- Cancel Membership Card on page 40
- Delete Membership Card on page 41

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

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

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

Benefits and Sent Items Section
On a constituent membership page, you can view a list of benefits and sent items, which includes recent mailings. Click View all benefits and items to go to a list of all benefits and items sent for this membership.
Recent Membership Transactions Section

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

If a membership program has payments tracked in another system, revenue transactions and the revenue history are not available.

Edit Recent Membership Transactions

You can edit recent membership transactions from the constituent's membership page. When you edit the transaction, you can change the level and term, as well as the transaction and expiration dates.

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

Membership Attributes Section

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

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

Add a membership attribute

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

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

Edit a membership attribute

If an attribute for a membership needs to be modified, you can edit it. From the constituent membership page, select an attribute and click Edit.

Delete a membership attribute

If an attribute no longer applies to a membership, you can remove it. From the constituent membership page, select an attribute and click Delete.

Documentation Section

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

Membership and Membership Card Tasks

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

Edit Members for a Membership

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

Edit Membership Details

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

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

Edit Membership ID

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

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

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

Edit Renewal Information for a Gift of Membership

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

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

Note: When you make a membership a gift, this screen appears as Make membership a gift.
Change Installment Plan Schedule

If a membership is to be paid with a membership installment plan schedule, you can reschedule the remaining installments. From the summary section on Membership tab or the membership page, click **Change installment plan schedule.** On the Reschedule remaining installments, you can view the total revenue amount along with the balance. For the remaining installments, you can change the frequency and the number of installments remaining, as well as the next installment date.

Mid-term Upgrade for a Membership

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

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

Only memberships that are paid in full are eligible to be upgraded. This includes memberships purchased with a single payment or memberships with installment plans which have been paid off completely.

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

If the same membership could also be purchased with six $10 installments and the installments were paid in full, the upgrade would cost the member $15 instead.

Membership installment plans cannot be used to pay for upgrades. The only payment option available for an upgrade is "Pay in full."

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

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

Transfer Membership

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

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

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

When a membership expires, a Renew now button appears on the constituent's membership page. When you click Renew now, you can select the membership dues batch to add the renewal transaction. For more information, see Membership Dues on page 43.

Rejoin a Membership

When a membership is lapsed or dropped, the Rejoin button appears. After you rejoin the membership, the membership status becomes active. When you click Rejoin, you can select the membership dues batch to add the rejoin transaction. For more information, see Membership Dues on page 43.

Cancel a Membership

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

Issue New Membership Card

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

You are allowed to issue as many cards as the membership level allows. If the membership level allows one card and a card has already been issued, you will not be able to issue another card until you cancel the first card. For information, see Cancel Membership Card on page 40.

Clear Membership Card Print Status

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

Assign Membership Card Number

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

Edit Membership Card

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

If you edit a membership card and need to reprint it, see Clear Membership Card Print Status on page 40.

Cancel Membership Card

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

**Delete Membership Card**

You are allowed to issue as many cards as the membership level allows. If the membership level allows one card and a card has already been issued, you will not be able to issue another card until you cancel or delete the first card. Only cards with a status of "Issued" can be deleted. When you click **Delete**, the membership card is removed and no record of the card being issued remains. You can also cancel a membership card. For more information, see **Cancel Membership Card** on page 40.

**Remove Gift Membership Status**

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

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

**Make Membership a Gift**

To make a membership a gift, go to the constituent’s membership record and under **Other tasks**, click **Make membership a gift**. The Make membership a gift screen appears. Select who to send the renewal notice to and who the gift was given by and click **Save**. For information about this screen, see **Edit Renewal Information for a Gift of Membership** on page 38.

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

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

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

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

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

Membership Dues Workflow

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

To successfully enter payments for membership dues, you must perform several steps.
From Administration, select Batch and then Batch entry. Under Configuration, click Batch numbering schemes to create a numbering scheme to use with membership dues batches. The batch numbering scheme determines whether you manually assign identification numbers to these batches or the program automatically assigns the batch numbers.

From Batch entry, click Batch workflows under Configuration to create a workflow to use with membership dues batches. The batch workflow determines the steps required to commit batch information to the database. For example, your organization may require a review and approval process for membership dues payment information.

From Batch entry, click Batch templates under Configuration to create a template to use with membership dues batches. The template includes any field defaults and determines the batch numbering scheme and workflow to use with batches created from the template. Your organization may create multiple templates for membership dues batches. For example, you may create separate templates with defaults based on membership programs or levels.

To add a payment for membership dues, enter the dues as a batch from Memberships, Revenue, or Batch entry. When you start to enter membership dues payments in a batch, you select which template to use to capture the information. For information about how to enter membership dues payments, see Enter Membership Dues Payments on page 51.

From Batch entry, you can perform several tasks to manage aspects of membership transactions, such as members, add-ons, and donations. For information about how to manage this information within a membership dues batch, see Membership Dues Batch Tasks on page 56.

After you commit the membership dues batch, manage information about its payments as necessary from their transaction records in Revenue.

Add a Membership

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

To enter multiple memberships at one time, you can use the Enter membership dues batch. Batch entry gives you added convenience, control, and audit trail than the one-off screen. For more information, see Add Membership Dues Batches on page 52.

Add a membership

Note: If you are adding a membership to a program whose payments are made in another system, several fields and sections on this screen are not available. In the What are they paying for section, the payment options do not appear. The Is there a discount or promotion section does not appear. The Do they want add-ons section does not appear. The Are they also giving a donation section does not appear. The How are they paying section does not appear. In addition, the Do not receipt, Tax deductible amount, and Total amount fields do not appear. For information about these types of programs, see How to Set Up a Program for Memberships with Revenue in Another System on page 7.

1. From Memberships, click Add a membership under Tasks. The Add a membership screen appears. For information about the items on this screen, see Add a Membership Screen on page 48.
2. If your organization configures multiple general ledger account systems and implements site security, and you have rights to work with multiple account systems, the Account system link appears. To select the account system to apply the payment toward, click the link.

**Warning:** After you save the payment, you cannot edit its account system. To apply the saved payment to another account system, you must delete the payment and add it again.

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

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

4. Under **Who is paying for this?**, enter information about the constituent who pays the membership dues.

   a. Search for and select the name of the constituent who pays the membership dues. Or, if you receive the payment in response to a membership renewal effort, enter the finder number from the reply form to identify the constituent.
   
   b. In the Date field, select the date of the payment. For example, select the current date or the date you receive the payment.
   
   c. If you receive the payment in response to a membership renewal effort, search for and select the effort to track its effectiveness.
**Note:** If you identify the constituent by finder number or source code, the **Effort** field automatically displays the membership renewal effort and appeal.

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

5. Under **What are they paying for?**, enter information about the membership to apply the payment toward.
   
a. Select whether to use the payment to add, renew, or upgrade a membership.

   b. If the membership program allows you to pledge its dues, select whether to pay for the transaction in full, pay only the first installment, or create an installment plan without making any payments.

   c. If the payment amount includes additional revenue to apply toward the next installment, select **Pay other amount** and enter the amount to apply. If you want any additional amount to count as a donation instead of a payment toward the next installment amount, you can still use the "Are they also giving a donation" fields on the screen.

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

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

   f. By default, the **Amount** field displays the cost of the membership dues, based on the program, level, and term. Edit the membership amount as necessary. If you want to reduce the amount of the transaction, consider using promotions instead of manually changing the transaction amount.

6. Select whether to apply a membership promotion to the transaction. If you select to apply a promotion, enter the applicable promotion code.

7. If the membership program allows add-ons such as guest passes, select the add-ons to include in the transaction.

8. If the selected program level allows multiple members, under **Who should be included on this membership?**, search for and select the constituents to include as members. If the membership program allows child members, under **Number of children**, search for and select the constituents to receive child memberships.

9. Under **Which members should receive a card?**, select the members to receive membership cards. For each member selected, enter the name to appear on the card and adjust the expiration date as necessary.

10. If the payment includes a donation to your organization in addition to the membership dues, enter information about the donation.

    a. Under **Are they also giving a donation?**, select **Add a donation of**, enter the donation amount, and select whether the constituent gives the donation anonymously.

    b. To apply the donation to a major giving plan opportunity, search for and select the opportunity.

    c. Search for and select the designation to which to apply the donation.

    d. In the **Category** field, select the category for the donation amount, such as Membership Giving. Your system administrator configures the selections available for this field.

    e. In the **Campaigns** field, the default campaigns for the selected designation appears. To apply the donation amount toward other campaigns, click **Edit**. On the Campaigns screen, search for and select the campaigns to apply the donation toward.
f. If you set up solicitor credit rules for major giving in *Prospects*, the **Solicitors** field displays the default solicitor for the selected opportunity. To credit other solicitors with the donation, click **Edit**. On the Solicitors screen, search for and select the solicitors to associate with the donation and how much credit each receives for the donation amount.

g. In the **Recognition** field, the default recognition credits for the constituent appear. To edit the recognition credit associated with the donation, click **Edit**. On the Recognition credits screen, search for and select the constituents to receive recognition credit. For each constituent, select the type, effective date, and amount of recognition credit received and the designation to which to apply the credit.

11. If the constituent pays for the first installment or creates an installment plan without making a payment, set up the installment schedule.

**Tip:** If you have an irregular installment schedule that is similar to one of the "regular" schedules (such as annually, quarterly, or monthly), you can select the regular frequency first. The payment schedule and amounts default according to the frequency you select. You can then modify the dates and amounts to meet your needs. For example, if you want a 12-month installment plan with a first payment of $50 and subsequent monthly payments of $5, you can first select a frequency of monthly. The 12 monthly installment dates and amounts will default into the schedule with the amounts evenly divided. You can then easily modify the amounts to reflect your payments.

a. In the **Frequency** field, select the frequency of the installments, such as Monthly or Single installment.

b. In the **Starting on** field, select the due date of the first installment.

c. In the **No. installments** field, enter the number of installments into which to divide the payments.

d. Select **Send reminders** to make installment plan reminders available to be included in pledge reminder processes.

e. The grid displays the regular schedule for the membership installment plan, based on the frequency, start date, and number of its installments. To set up an irregular installment, such as if the constituent requests to skip a month, edit the **Date** and **Amount** columns as necessary.

12. Under **How are they paying?**, enter information about how you receive the payment, such as by check or credit card. If this is a recurring membership and you chose to create the recurring gift, but not make the first payment, you can still enter credit or debit card information. The token will be saved to use for future recurring gift payments for the membership.

In order to process direct debit payments in euros from a constituent with a bank account which uses the "Europe (SEPA)" banking system, the organization must have a signed SEPA mandate on file from the constituent which authorizes the organization to draw funds from the constituent’s account. In the **Mandate** field, select an existing mandate or click **Add** to add a new one.

13. Select whether to send an acknowledgement to the constituent for the payment.

To send an acknowledgement, select the letter to send the constituent when your organization includes the payment in an acknowledgement process.

To apply the revenue to a tribute, search for and select the tribute.

14. The **Total amount** field displays the total amount of the payment. In the **Tax deductible amount** field, enter the monetary value of the payment, such as for a receipt. For example, if the constituent receives benefits for the payment, this amount is the total amount minus the total benefit amount.
15. Your organization may run a receipt process to automatically generate a receipt for the payment. To exclude the payment when you run this process, select Do not receipt.

16. Click Save. The record of the payment appears and the membership record has been created.

For information about the items on the payment record, see the Revenue Guide.

Add a Membership Screen

This table explains the items on the Add a membership screen. These fields also appear on the Enter membership dues batch screen. For information about how to access these screens, see Add a Membership on page 44 and Membership Dues on page 43.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are you doing with this payment?</td>
<td>Select whether the constituent provides the payment to pay for a personal membership or for a gift of membership for another constituent.</td>
</tr>
<tr>
<td>Who is the membership being given to?</td>
<td>If you select Giving a membership to someone else, this section appears. In the Name field, search for and select the constituent to receive the gift of membership as the primary member. You can search for the constituent by name, lookup ID, or telephone number. Select whether to send renewal notices to the giver, the primary member, or both.</td>
</tr>
<tr>
<td>Who is paying for this?</td>
<td>Specify the constituent that provides the payment. You can search for and select the constituent in the Name field or, if you receive the payment in response to an appeal mailing or membership renewal effort, enter the finder number from the reply form. In the Date field, select the date of the payment, such as the date you receive it or the date you add it to the database. If you enter the finder number to specify the constituent, its appeal mailing or membership renewal effort appears under Marketing information. To associate the payment with a mailing or effort, search for and select the communication. You can also enter a source code. The related appeal and effort appear under Marketing information. In the Inbound channel field, select how you receive the payment, such as by Mail, Phone, or Walk-in. In the Transaction notes box, enter any additional information about the membership transaction.</td>
</tr>
<tr>
<td>What are they paying for?</td>
<td>Select how to apply the payment toward the membership dues, such as for a join or renewal, and select the applicable membership program, level, and term as necessary. If paying for a lifetime or recurring program, the term is replaced with the payment options. When you select the membership program, the Benefits field displays any default benefits the constituent receives for the transaction. If the selected membership program and level assign benefits based on the number of members, the quantity of benefits received matches the maximum number of members allowed for the selected level. In the Expires on field, the expiration date of the membership appears, based on the selected program, level, and term. Edit the expiration date as necessary. If the selected membership program allows an installment plan, select whether to pay the membership in full, pay only one installment, or pledge the entire membership and create an installment plan. If the program has payments tracked in another system, payment options do not appear. In the Membership amount field, the total amount of the membership dues appears, based on the selected program, level, and term. Edit the amount as necessary. If an installment plan has been creating and you are making a payment toward it, the payment options include: Pay in full, Pay next installment, and Pay other amount. When you select Pay other amount, you enter the amount of the payment.</td>
</tr>
<tr>
<td></td>
<td>• If the amount is less than the next installment amount, the next installment is partially paid.</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is there a discount or promotion?</td>
<td>Select whether to apply a discount or promotion toward the cost of the membership. To apply a discount or membership, select <strong>Yes, apply the following discount</strong> and select the discount or enter the applicable promotion code. If the program has payments tracked in another system, this section does not appear.</td>
</tr>
<tr>
<td>Do they want any add-ons?</td>
<td>If the selected membership program offers add-ons, select the add-ons to include with the membership. The <strong>Total add-on amount</strong> field displays the total cost of the selected add-ons. If the program has payments tracked in another system, this section does not appear.</td>
</tr>
<tr>
<td>Who else should be included on this membership?</td>
<td>If the selected membership program level allows multiple members, such as a Family level, select the constituents to include as members and enter the number of children to include.</td>
</tr>
<tr>
<td>Which members should receive a card?</td>
<td>Select which members receive membership cards. For each selected member, enter the name to appear on the card and adjust the expiration date as necessary. Select <strong>Send reminders</strong> to make install plan reminders available to be included in pledge reminder processes.</td>
</tr>
<tr>
<td>What is the installment plan?</td>
<td>If the constituent pledges the membership payment or pays for the first installment, set up the installment schedule, including the frequency, start date, number of installments, and the schedule.</td>
</tr>
<tr>
<td>Tip:</td>
<td>If you have an irregular installment schedule that is similar to one of the &quot;regular&quot; schedules (such as annually, quarterly, or monthly), you can select the regular frequency first. The payment schedule and amounts default according to the frequency you select. You can then modify the dates and amounts to meet your needs. For example, if you want a 12-month installment plan with a first payment of $50 and subsequent monthly payments of $5, you can first select a frequency of monthly. The 12 monthly installment dates and amounts will default into the schedule with the amounts evenly divided. You can then easily modify the amounts to reflect your payments. Select <strong>Send reminders</strong> to make installment plan reminders available to be included in pledge reminder processes.</td>
</tr>
<tr>
<td>Are they also giving a donation?</td>
<td>If the payment includes a donation to your organization in addition to the membership dues, select <strong>Add a donation of</strong> and enter the amount of the payment to apply as a donation. To apply the donation toward a major giving opportunity, search for and select the opportunity. Search for and select the fundraising designation to apply the donation amount toward. To group the donation with similar donations, select the applicable category. For example, your organization may have a Membership Donations category to easily track donations received from members. In the <strong>Campaigns</strong> field, the default campaigns for the selected designation appear. To apply the donation amount toward another campaign, click <strong>Edit</strong> and select the applicable campaigns. If you set up solicitor credit rules for major giving in <strong>Prospects</strong>, the <strong>Solicitors</strong> field displays the default solicitors for the selected opportunity. To credit other solicitors with the donation, click <strong>Edit</strong>, select the solicitors and enter how much credit each receives.</td>
</tr>
</tbody>
</table>
### Membership Dues Constituent Search

When you add a membership dues transaction, you can search for constituents, such as to identify who makes the payment, receives a gift of membership, or to include as a member. In the Name field, you can enter the constituent’s lookup ID, phone number, or name to begin the search. For more search criteria, such as address, alternate lookup IDs, or constituent type, you can access the Membership Dues Constituent Search screen.

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

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

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

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

**Note:** In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch that does not have the Bill to field marked as required.

Uncommitted Membership Dues Batches

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

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

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

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

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

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

- **Enter multiple membership transactions**

  **Note:** If you are adding a membership to a program whose payments are made in another system, several fields and sections on this screen are not available. In the What are they paying for section, the payment options do not appear. The Is there a discount or promotion section does not appear. The Do they want add-ons section does not appear. The Are they also giving a donation section does not appear. The How are they paying section does not appear. In addition, the Do not receipt, Tax deductible amount, and Total amount fields do not appear. For information about these types of programs, see How to Set Up a Program for Memberships with Revenue in Another System on page 7.

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

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

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

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

5. Click Save. The Enter membership dues screen appears. Most of the items on this screen are the same as the Add a membership screen. For more information, see Add a Membership Screen on page 48.
Note: The batch template determines the fields available on the Enter membership dues screen. If you hide fields in the template, they may not appear on the screen.

6. For each membership dues transaction, enter information about its membership and payment.
   a. If your organization configures multiple general ledger account systems and implements site security, and you have rights to work with multiple account systems, the Account system link appears. To select the account system to apply the payment toward, click the link.

   Warning: After you save the payment, you cannot edit its account system. To apply the saved payment to another account system, you must delete the payment and add it again.

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

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

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

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

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

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

      In the Inbound channel field, select the channel through which you received the payment, such as Mail, Phone, or Walk-in.
Under **Transaction notes**, enter any additional information to track about the transaction.

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

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

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

If the membership program allows you to pay its dues in installments, select whether to pay for the transaction in full, pay only one installment, or create a membership installment plan without adding a payment.

If the payment amount includes additional revenue to apply toward the next installment, select **Pay other amount** and enter the amount to apply. If you want any additional amount to count as a donation instead of a payment toward the next installment amount, you can still use the "Are they also giving a donation" fields on the screen.

**Note:** If you select **Pay first installment** or **Create installment plan**, a revenue transaction with a transaction type of Membership installment plan is created. For information about membership installment plans, see Membership Installment Plans on page 22.

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

e. Select whether to apply a membership promotion to the transaction. If you select to apply a promotion, enter the applicable promotion code.

f. If the membership program allows add-ons such as guest passes, select the add-ons to include in the transaction.

g. If the selected program level allows multiple members, under **Who else should be included on this membership?**, search for and select the constituents to include as members and enter the number of children to include.

h. Under **Which members should receive a card?**, select the members to receive membership cards. For each member selected, enter the name to appear on the card and adjust the expiration date as necessary.

i. If the payment includes a donation to your organization in addition to the membership dues, under **Are they also giving a donation?**, enter information about the donation.

j. If the constituent pays for the first installment or creates an installment plan without making a payment, set up the installment schedule.

**Tip:** If you have an irregular installment schedule that is similar to one of the "regular" schedules (such as annually, quarterly, or monthly), you can select the regular frequency first. The payment schedule and amounts default according to the frequency you select. You can then modify the dates and amounts to meet your needs. For example, if you want a 12-month installment plan with a first payment of $50 and subsequent monthly payments of $5, you can first select a frequency of monthly. The 12 monthly installment dates and amounts will default into the schedule with the amounts evenly divided. You can then easily modify the amounts to reflect your payments.

k. Under **How are they paying?**, enter information about how you receive the payment, such as by check or credit card. If this is a recurring membership and you chose to create the recurring gift, but not make the first payment, you can still enter credit or debit card information. The token will be saved to use for future recurring gift payments for the membership.
For a payment method of Credit card or Direct debit, the **Mark this membership for automatic renewal for later query** checkbox appears. To include the membership in query results for memberships to convert to automatically paid memberships, select this checkbox.

In order to process direct debit payments in euros from a constituent with a bank account which uses the "Europe (SEPA)" banking system, the organization must have a signed SEPA mandate on file from the constituent which authorizes the organization to draw funds from the constituent's account. In the **Mandate** field, select an existing mandate or click **Add** to add a new one.

1. Select whether to send an acknowledgement to the constituent for the payment.

   - If the constituent requests to pay for the membership anonymously, select **Is anonymous**.
   - To apply the revenue to a tribute, search for and select the tribute.

   You can also select the post status and date.

m. The **Total amount** field displays the total amount of the payment. In the **Tax deductible amount** field, enter the monetary value of the payment, such as for a receipt. For example, if the constituent receives benefits for the payment, this amount is the total amount minus the total benefit amount.

n. Your organization may run a receipt process to automatically generate a receipt for the payment. To exclude the payment when you run this process, select **Do not receipt**.

   - Click **Next Payment**. Under **Summary - Batch #**, the payment appears.

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

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

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

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

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

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

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

**Committed Membership Dues Batches**

On the Committed batches tab of the Enter Membership Dues page, you can view the membership dues batches that are committed to the database. When you commit a batch to the database, the program uses its data to create records of the membership dues payments to the database. Under **Uncommitted batches**, you can view the number, owner, and status of each uncommitted membership dues batch.
To limit the batches that appear, you can filter the grid by the date the batches commit to the database and select whether to include deleted batches. To filter the grid, select the criteria of the batches to view and click Apply. To remove the filter and view all batches, click Reset.

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

Membership Dues Batch Tasks

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

Note: In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch that does not have the Bill to field marked as required.

Manage Members and Membership Cards in a Membership Dues Batch

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

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

- **Manage members and membership cards**
  1. On the batch data entry screen, select the membership with the members or membership cards to manage.
  2. On the Dues tab, click Members and cards under Members on the ribbon bar. The Members and cards screen appears.
3. Under **Additional members**, specify the constituents to include as members. You can select constituent relationships of the primary member, or you can search for and select constituents as necessary.

4. Under **Members receiving cards**, select which members receive membership cards if the membership level includes multiple cards. For each member selected, enter the name and expiration date to appear on the card.

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

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

### Edit Membership Installments in a Membership Dues Batch

Your organization may allow members to pledge dues for specific membership programs. From a membership dues batch, you can set up the installment schedule for a pledged membership.

- **Edit the installment schedule for a pledged membership**
  1. On the batch data entry screen, select the pledged membership with the installment schedule to edit.
  2. On the Dues tab, click **Edit installments** under **Pledge** on the ribbon bar. The Installment schedule screen appears.
3. In the **Frequency** field, select the frequency of the installments, such as Monthly or Quarterly.

4. In the **Starting on** field, select the due date of the first installment.

5. In the **No. installments** field, enter the total number of installments into which to divide the pledge.

6. In the grid, the regular installment schedule, based on the entered frequency, start date, and installment number, appears. To set up an irregular installment, such as if the member requests to skip a month, edit the grid as necessary.

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

### Manage Benefits in a Membership Dues Batch

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

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

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

**Manage benefits for a membership in a dues batch**

1. On the batch data entry screen, select the membership with the benefits to manage.

2. On the Dues tab, click **Benefits** on the ribbon bar. The Benefits screen appears.
3. In the grid, search for and select the benefits that the constituent receives for the membership transaction.

4. For each benefit, enter the quantity the constituent receives. The **Total fair market value** field displays the total value of the benefits received. The fair market value is set up when you manage benefits from the **Benefits catalog** in **Memberships**.

5. In the **Tax deductible amount** field, edit the tax-deductible value of the membership if necessary. By default, the tax deductible amount is the cost of the membership minus the monetary value of any membership-related benefits.

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

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

**Manage Add-ons in a Membership Dues Batch**

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

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

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

**Manage Donations in a Membership Dues Batch**

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

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

![Additional donation screen](image)

3. Select **Add a donation of** and enter the total monetary amount of the donation.

4. To apply the donation to a major giving plan opportunity, search for and select the opportunity.

5. Search for and select the designation to which to apply the donation.

6. In the **Category** field, select the category for the donation amount, such as Membership Giving. Your system administrator configures the selections available for this field.

7. In the **Campaigns** field, the default campaigns for the selected designation appear. To apply the donation amount toward other campaigns, click **Edit**. On the Campaigns screen, search for and select the campaigns to apply the donation toward.

8. If you set up solicitor credit rules for major giving in Prospects, the **Solicitors** field displays the default solicitor for the selected opportunity. To credit other solicitors with the donation, click **Edit**. On the Solicitors screen, search for and select the solicitors to associate with the donation and how much credit each receives for the donation amount.

9. In the **Recognition** field, the default recognition credits for the constituent appear. To edit the recognition credit associated with the donation, click **Edit**. On the Recognition credits screen, search for and select the constituents to receive recognition credit. For each constituent, select the type, effective date, amount of recognition credit received, and the designation to which to apply the credit.

10. Click **OK**. Your return to the batch data entry screen.

**Manage Promotions in a Membership Dues Batch**

From a membership dues batch, you can manage discounts and promotions to apply toward membership transactions. For example, to increase membership enrollment, your organization may offer reduced dues for new memberships during a specific weekend. On the batch data entry screen, select the membership and then, on the Dues tab, click **Promotion** under **Options**.
On the Membership Promotions screen, select whether to apply a discount to the membership transaction. If you select Yes, select the discount or enter the code of the promotion to apply. To return to the batch data entry screen, click OK.

Member Dues Batch Reports

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

Membership Dues Batch Validation Report

The Membership Dues Batch Validation Report displays the number and properties, including projected totals, of the batch; lists the membership dues transactions in the batch; and calculates the total count and monetary amount of the transactions.
For each transaction, you can view its constituent, date, amount, payment method, revenue type, and membership program and level. By default, the report sorts the transactions by their order in the batch; however, you can click a column header to sort by that value.

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

**Membership Dues Batch Control Report**

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

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

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

**Membership Dues Batch Exception Report**

When you commit a membership dues batch to the database, some transactions may not commit to the database, such as due to incorrect or insufficient data entry. Transactions that do not commit are called "exceptions." The Membership Dues Batch Exception Report displays the number and properties, including projected totals, of the batch; lists the membership dues transactions in the batch that did not commit to the database; and calculates the total count and monetary amount of the transactions that did and did not commit.
For each exception, you can view its constituent, date, amount, payment method, revenue type, and an explanation of why the transaction did not commit.

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

### Import Membership Dues

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

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

> **Import membership dues transactions**

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

1. From Administration, add an import process based on the membership dues batch template to use with your membership dues transactions.

2. To create the membership dues transactions, map the import process to your import file and run the import process. For information about the requirements of specific fields in your import file, see Membership Dues Import Fields on page 64.

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

a. From the status page of the membership dues import process, download the exception file to determine which rows in your import file contain new constituents or incorrect information.

b. If necessary, use the information in your import file to add all new constituents to your database. For example, create a new import file of the constituent information and use an import process based on a constituent batch, or create and commit a constituent batch of the new constituent information.

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

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

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

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

**Membership Dues Import Fields**

To import membership dues, your import file must be a comma-separated values (*.csv) of the membership dues information. The table below explains the requirements of specific fields in the import file. For information about additional fields used to add membership dues, see Add a Membership Screen on page 48.

<table>
<thead>
<tr>
<th>Template column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership transaction type</td>
<td>This field determines the type of membership transaction to add, such as a join or renewal. You can enter only one of these values. To add a new membership, enter 0. To renew an existing membership, enter 1.</td>
</tr>
<tr>
<td>Discount type</td>
<td>For a transaction that includes a Manual membership promotion, enter the name of the promotion. For a transaction that includes a With code membership promotion, leave this field blank. Instead, enter the promotion code in the Promotion code field.</td>
</tr>
<tr>
<td>Promotion code</td>
<td>For a transaction that includes a With code membership promotion, enter the code for the promotion. For a transaction that includes a Manual membership promotion, leave this field blank. Instead, enter the promotion name in the Discount type field.</td>
</tr>
<tr>
<td>Membership program add-ons, Add-on type</td>
<td>When you add add-ons to a membership, the Add-on type field indicates whether the add-on is for a benefit or an additional member. You can enter only one of two values. To add a benefit add-on, enter 0. To add an additional member add-on, enter 1.</td>
</tr>
<tr>
<td>Members receiving cards, Member</td>
<td>When you add additional members with membership cards to a membership, enter the system record ID for the member to receive a membership card. To include this value in a constituent query, include the Constituent/Constituent record field.</td>
</tr>
</tbody>
</table>
Print Membership Cards

Print Membership Card Tasks

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

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

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

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

Add Print Membership Card Process

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

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

- Add a print membership card process
  1. On the Print Membership Cards page, click Add. The Add a print membership cards process screen appears.
2. On this screen, you can enter name and description information. You can also select criteria details and results information.

For information about items on this screen, see Add a Print Membership Cards Process Screen on page 66.

3. To close the screen and save the information you entered, click **Save**. The process status page appears. For information about this page, see Go To Process Status Page for Print Membership Cards on page 68.

You are now ready to run the print membership cards process to prepare membership cards to be printed or downloaded as a .csv file. For information about how to run the print membership cards process, see Run Print Membership Cards Process on page 67.

### Add a Print Membership Cards Process Screen

The following table explains the items on this screen.

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

**Run Print Membership Cards Process**

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

- **Run print membership cards process**
  1. From the Print Membership Cards page, select a process and click Start process. The Run print membership cards process screen appears.
For information about items on this screen, see Run Print Membership Cards Process Screen on page 68.

2. To run the print membership cards process, click Start. The process begins, and you are sent to the Recent Status tab on the Print Membership Cards page. For information about the Recent Status tab, see Recent Status Tab on page 69.

After the process completes, you can print membership cards or download them as a .csv file to be sent to a third party to print. For information about how to print or download membership cards, see Print Membership Cards on page 71 and Download Membership Cards on page 72.

### Run Print Membership Cards Process Screen

The table below explains the items on this screen.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process name and For membership program</td>
<td>This information defaults from the Name and Program name fields on the Add (or Edit) print membership cards process screen. The fields are disabled. To change the process name, access the Edit print membership cards process screen.</td>
</tr>
<tr>
<td>Create constituent selection from results</td>
<td>To create a Constituent selection for a group of members in the process, select this checkbox. The remaining field and checkbox are enabled.</td>
</tr>
<tr>
<td>Selection name</td>
<td>When you select Create constituent selection from results, you must enter a name for the selection that the process generates.</td>
</tr>
<tr>
<td>Overwrite existing selection</td>
<td>To overwrite the selection in the previous field each time you run the process, select this checkbox.</td>
</tr>
</tbody>
</table>

### Go To Process Status Page for Print Membership Cards

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

**Recent Status Tab**

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

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

- **Go to results:** To view a list of constituents included in the process, click Go to results. A Printed cards grid appears. Additional information in the grid includes data, such as the card status, card number, name on card, and expires on date. You can also assign a different membership card number if necessary, clear the results of the process, and delete the status record entirely.
- **Print cards:** To print the membership cards that were processed, click Print cards. The Print membership cards screen appears and allows you to select a different card format if necessary. For information, see Print Membership Cards on page 71.
- **Download output:** If you would rather download a .csv file of the membership cards that were processed to be sent to a printing service, click Download output. The Save As screen appears for you select a location to save the membership cards. For more information, see Download Membership Cards on page 72.
- **Delete:** To delete the most recent instance of the process, click Delete.
• **Clear results**: To run a print membership cards process again, click **Clear results**. This allows you to run the process for the cards again.

**History Tab**

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

![History grid](image)

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

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

• **Print cards**: To print the membership cards that were processed, click **Print cards**. The Print membership cards screen appears and allows you to select a different card format if necessary. For information, see **Print Membership Cards** on page 71.

• **Download output**: If you would rather download a .csv file of the membership cards that were processed to be sent to a printing service, click **Download output**. The Save As screen appears for you select a location to save the membership cards. For more information, see **Download Membership Cards** on page 72.

• **Delete**: To delete a single instance of the process, select the process. Click **Delete**.

• **Reset print status**: To reset the status of the print membership card process, click **Clear results**. The status of the process changes from “Printed” to “Issued.” If you already downloaded or printed membership cards, you must reset the print status to perform the action again.

• **Filter**: As the history list grows, it may be difficult to find a particular print membership cards process. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.

• **Refresh**: To make sure you have the latest process information, click **Refresh**.

**View Print Membership Card Process Results**

After you run a print membership cards process, the process status page appears. To view specific results of the print process, including a list of the membership cards prepared during the selected process, click **Go to results**. The process results page appears.
The Printed cards grid displays information about each card prepared during the process and provides specifics like the card status, card number, name on the card, and expiration date. Depending on your security rights and system role, you can perform functions to manage the instance of the process you are viewing. For example, you can assign a different number to a card printed during this process or clear the process results.

- **Assign card number**: To associate a different card number with the selected membership card, click Assign card number. On the screen that appears, in the Card number field, enter the number for the card. Click Save.
- **Reset print status**: Click Clear results. This allows you to run the process for the cards again.
- **Delete**: To delete the instance of the process, click Delete.

### Clear Print Status of Printed Membership Cards

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

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

### Print Membership Cards

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

- **Print membership cards**
  1. From the print membership cards process status page, click Print cards. The Print membership cards screen appears.
2. Select a different card format if necessary.
3. Click Save. A download screen appears.
4. Select a location to download the file and click Save.
5. Open the file you just downloaded and print from your compatible document editor.

Download Membership Cards

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

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

A message appears that confirms the location where the .csv file was saved, and asks whether to display the file.
- To view the membership cards .csv file, click **Yes**. The membership cards file appears.
- To not view the membership cards .csv file, click **No**. You return to the print membership cards process status page.

Membership Card Formats

Provided in the system are preconfigured membership card formats you can use when you print membership cards. Each card format is a mail merge document created in Microsoft Word. The card formats use data fields that pull specific member and membership information from your database to create the membership cards and content. For more information about the fields that can be added to a card format, see **Membership Card Format Data Fields** on page 78.
If necessary you can edit the preconfigured membership card formats. For example, you may want to include or exclude certain merge fields in the content of the membership card document. To edit the membership card format, from Marketing and Communications, under Configuration, click Letter template library. On the page that appears, you can edit the necessary templates.

**Full Sheet, Letter With One Card Format**

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

```
<MEMBER>
<ADDRESS>
<CITY>, <STATE> <ZIP>

Dear <MEMBER>:

We appreciate your support. You have joined our membership program as a <LEVEL> member. Your membership doesn’t expire until <EXPIRATIONDATE>, so you have lots of time to enjoy the many benefits of membership.

Sincerely,

Membership Coordinator
```

**Full Sheet, Letter With Two Cards Format**

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

By default, the system includes a selection of preconfigured membership card formats you can use when creating card formats for membership cards. We recommend you use the pre-configured membership card formats as a starting point. For more information, see Membership Card Formats on page 72. If needed, you can create your own membership card formats instead of using the preconfigured card formats.

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

Dear MEMBER:

We appreciate your support. You have joined our membership program as a LEVEL member. Your membership doesn’t expire until EXPIRATION DATE, so you have lots of time to enjoy the many benefits of membership.

Sincerely,

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

- **Generate a membership card format header file**
  1. From the *Marketing and Communications*, under *Configuration*, click *Letter template library*. The Letter Template Library page appears.
  3. In the *Letter type* field, select “Membership card.”
  4. In the *Output format* field, select “Membership card output.”
  5. In the *Header file* field, click the ellipsis. The Save As screen appears. Browse to the location to save the new *.csv* header file and name the file.

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

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

- **Create a membership card format**

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

  1. From Word, create a new blank document and write the body of the membership card format. The body of the letter should provide context for the data fields you will add to the letter during this process. For examples of how to format the letter, you can review the preconfigured templates included in the system. For more information, see *Membership Card Formats* on page 72.

  2. On the ribbon, select the *Mailings* tab.

  3. In the *Start Mail Merge* group, click *Select Recipients, Use Existing List*. The Select Data Source screen appears.
4. Browse to membership card format header file (*.csv) you previously created, select it and click Open. The Header Record Delimiters screen appears.

5. Leave the default settings as they appear on the Header Record Delimiters screen and click OK. You return to the Word document.

6. In the Write & Insert Fields group, click Insert Merge Field. A list of the membership card data fields you can add to the membership card format appears.
Note: Prior to inserting a field, you can place your cursor in the document in the location where the field should go within the body of the membership card format letter. You can also move the fields around as needed within the document after they are inserted.

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

Note: The data fields you place in the membership card format will be used to pull specific data from your database when a membership card is created for a constituent. For a list of the fields you can insert and their definitions, see Membership Card Format Data Fields on page 78.

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

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

Add the membership card format to the Letter Template Library

1. From Marketing and Communications, under Configuration, click Letter template library. The Letter Template Library page appears.
2. On the action bar, click Add. The Add letter template screen appears.

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

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

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

Membership Card Format Data Fields

When you specify data fields in a membership card format, you can include information like the member’s name and address, and membership program and level. You can also include the merge fields necessary to create the membership card.
**Note:** To include the barcode on the membership card, you must use the `<<CARDNUMBER>>` field, and use the “3 of 9” font to display the field as a barcode. The whole merge field must be set to the “3 of 9” font.

The following table includes a list of the data fields you can include in your membership card format. For examples that illustrate how these fields are typically used in a membership card letter, see Membership Card Formats on page 72.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUSINESSPROCESSOUTPUT...PKID</td>
<td>This field is related to a system business process and should not be added to the membership card format.</td>
</tr>
<tr>
<td>ISGIFT</td>
<td>Gift of membership</td>
</tr>
<tr>
<td>MEMBER</td>
<td>Member’s name</td>
</tr>
<tr>
<td>GIVENBY</td>
<td>If this membership was a gift of membership, this field displays which constituent gave the gift of membership.</td>
</tr>
<tr>
<td>JOINDATE</td>
<td>Membership join date</td>
</tr>
<tr>
<td>LASTRENEWEDON</td>
<td>Date the membership was last renewed</td>
</tr>
<tr>
<td>LEVEL</td>
<td>Membership level</td>
</tr>
<tr>
<td>PROGRAM</td>
<td>Membership program</td>
</tr>
<tr>
<td>STATUS</td>
<td>Current membership status</td>
</tr>
<tr>
<td>TERM</td>
<td>Membership term</td>
</tr>
<tr>
<td>TYPE</td>
<td>Membership type</td>
</tr>
<tr>
<td>CURRENTLEVELPRICE</td>
<td>Price of the current membership level</td>
</tr>
<tr>
<td>NEXTLEVELNAME</td>
<td>Name of the next highest membership level</td>
</tr>
<tr>
<td>NEXTLEVELPRICE</td>
<td>Price of the next highest membership level</td>
</tr>
<tr>
<td>MEMBERSHIPCARDID</td>
<td>Membership card ID</td>
</tr>
<tr>
<td>CARDNUMBER</td>
<td>Membership card number. This field is used to display the barcode on the membership card. The font for this field must be set to “3 of 9”.</td>
</tr>
<tr>
<td>MEMBERSHIPID</td>
<td>Membership ID</td>
</tr>
<tr>
<td>NAMEONCARD</td>
<td>Name that appears on the membership card</td>
</tr>
<tr>
<td>MEMBERSINCE</td>
<td>Date the constituent first became a member</td>
</tr>
<tr>
<td>ADDRESS</td>
<td>Member address</td>
</tr>
<tr>
<td>CITY</td>
<td>Member city</td>
</tr>
<tr>
<td>STATE</td>
<td>Member state</td>
</tr>
<tr>
<td>Zip code</td>
<td>Member Zip code</td>
</tr>
<tr>
<td>PRIMARYADDRESSEE</td>
<td>Primary addressee</td>
</tr>
<tr>
<td>PRIMARYSALUTATION</td>
<td>Primary salutation</td>
</tr>
<tr>
<td>LASTORGGROUPNAME</td>
<td>Last name or group name</td>
</tr>
<tr>
<td>CARDNUMBERDISPLAY</td>
<td>Membership card number</td>
</tr>
<tr>
<td>REVENUEAMOUNT</td>
<td>Amount of revenue from membership purchase</td>
</tr>
<tr>
<td>REVENUE RECEIPTAMOUNT</td>
<td>Revenue receipt amount</td>
</tr>
<tr>
<td>REVENUEREREFERENCE</td>
<td>Revenue reference</td>
</tr>
<tr>
<td>REVENUEDATE</td>
<td>Date revenue was taken in</td>
</tr>
</tbody>
</table>
Membership Reports

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<th>Page</th>
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<td>Membership Actuals Report</td>
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</tr>
</tbody>
</table>

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

**Active Membership Report**

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

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

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

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

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

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

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

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

Membership Renewal Report

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

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

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

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

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

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

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

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

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

Membership Dues Revenue Report

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

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

Membership Projected Revenue Report

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

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

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

![Membership Projected Revenue](image)

---

**Membership Dues Statistics Comparison Report**

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

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

For reports grouped by activity, only the most recent membership transaction within the selected periods is counted in the **Totals** row. For example, if a member joins and renews within a selected period only, a single membership is counted in the total. However, a join and a renew is added to each activity sub-total for the period.
**Note:** The retention rate is the percentage of existing memberships that opted to renew a membership during the renewal opportunity. Lifetime memberships and memberships that are not due for renewal are excluded from the calculation.

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

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

**Membership Appeals Report**

The Membership Appeals Report compares performance information about a group of membership appeals such as goals, amount raised, number of donors, number of gifts.

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

**Membership Activity Report**

Before you run this report, a system administrator must install and configure a standard data mart. The data mart places records from your source database in a data warehouse so you can conduct complex reporting and analysis. For information about data marts, see the **Data Warehouse Guide**.

To run the report, from a membership program, click **Membership activity** under **Reports**. Select your Membership program under the Filters tab, and specify the proper dates. Click **View Report** and you will see
information on amounts of members, renewals, upgrades, drops, and other membership activities. You can click on specific numbers in the report to view a breakdown of those figures.

Active memberships will include memberships that were valid at any point during the specified date range. Retention rate is calculated as the number of memberships at the end of the date range subtracted by the number of memberships that joined during the date range, subtracted by the number of memberships that rejoined during the date range, and then divided by the amount of memberships at the start of the date range.

Use the Layout tab to divide membership activity statistics into groups, including country, ethnicity, month, and level. Click View Report to view the statistical breakdown.

**Note:** Address fields (Country, State, County, City) are pulled from the primary address of primary member. Education fields (Class Of, Degree) are pulled from the primary education of the primary member.

**Membership Actuals Report**

This report compares contributed revenue and earned revenue in two selected time periods. You can also view the variance, or how spread out the distribution is, of contributed and earned revenue from this report. Contributed revenue includes any revenue that is associated with a contributions-based membership. Earned revenue includes any revenue that is associated with a dues-based membership.

Before you run this report, a system administrator must install and configure a standard data mart. The data mart places records from your source database in a data warehouse so you can conduct complex reporting and analysis. For information about data marts, see the *Data Warehouse Guide*. 

**Note:** You can export the report using the floppy disk icon into multiple formats, including XML, PDF, Excel, and Word.
To run the report, from a membership program, click **Membership actuals** under **Reports**. Select your Membership program under the Filters tab, and specify the proper dates in the Period fields. Click **View Report** and you will see a comparison of Contributed and Earned Revenue in the two time periods. You can click on specific numbers in the report to view a breakdown of those figures.

Use the **Layout** tab to divide membership activity statistics into groups, including country, ethnicity, month, and level. Click **View Report** to view the statistical breakdown.

![Membership Actuals](image-url)