Member Management – Memberships

Objective:
To understand what Memberships are, how to configure them and the implications of Memberships as it pertains to new and renewing members of your organization.

Member Management Notes Series:
This document is the second of a series of notes regarding the YourMembership.com Member Management setup. There are several aspects that play a role in the configuration of your membership structure within the system. You need to review all aspects to ensure your database and membership structure is configured appropriately. We’ve outlined the related documents for Member Management that you should review in the following order:

- “Creating/Editing Member Types”
- “Custom Fields”
- “Memberships” (THIS DOCUMENT)
- “Membership Modifiers”
- “Characteristics-Based Dues Rules”
- “Renewal Rules”
- “Membership Promotional Codes”

What is a Membership?
Memberships in YourMembership.com are the method of charging your members’ dues and other payments to hold their membership with your organization. Memberships allow you to set how long a membership term is, the amount a member will pay as well as other critical settings. These “Memberships” are then linked to specific “Member Types” in order to be applied to the members within your database. A “Member Type” is used to classify different members of your organization & grant them specific rights within your online community. A “Membership” is the dues payment option available for that specific “Member Type.” This document will focus on how to create Memberships and their available settings as well as explain how they relate to Member Types.

If you have not yet reviewed the first two documents in our Member Management series “Creating/Editing Member Types” & “Custom Fields” we strongly recommend doing so before continuing with this document.
Creating Memberships

Since Memberships are dues payment options, they are located within the Ecommerce section. **Navigate** to “Ecommerce” tab > to left rail menu “Dues & Membership” > “Memberships” & click on “Add a New Membership.” We will outline all of the available configuration settings for Memberships below (in **bold**).

1. **Membership**: Enter the desired name for the membership. The name entered within this field will be displayed on the frontend of the website during the new member registration process as well as renewal. The Membership name is also used within the import file for standard member imports. *(Quick Tip: It is recommended to utilize naming conventions for your memberships. This will make it easier to distinguish between each membership administratively as well as identifying new members & renewing members. For example, if you are creating a membership that new student members will pay, name the membership “New Student Membership Dues”)*

![Membership Example](image)

2. **Membership Code**: The Membership Code is the internal name of the Membership and is only seen administratively on the backend. The Membership code is also used for sorting memberships within list views on the frontend and backend of the site. *(Quick Tip: Membership Code is also utilized in Membership Dues Transaction imports. It is recommended to name the Membership code something that relates to the actual name of the membership)*

3. **GL Code/Item Name**: Enter the appropriate General Ledger Code/Item name for the corresponding account within your accounting program. *(Quick Tip: It is important to include this information within the Membership before you begin collecting dues payments as the GL Code/Item name can be included in dues transaction exports which is critical for accounting purposes. Please review our “GL Codes & Commerce Configuration” notes documentation for more information on Accounting within YourMembership.com)*
4. **QuickBooks Class**: If you utilize QuickBooks as your accounting software, enter the appropriate QuickBooks Classification item within this field. *(Quick Tip: Along with GL codes the QuickBooks Class can be included in dues transaction exports. This additional classification is specifically useful for clients utilizing the YourMembership.com Plug-In for QuickBooks)*

5. **Dues Amount**: Utilize the “Dues Amount” field to enter a numeric amount that you wish to charge for a member to hold this membership with you. Only a number is needed within the field (no need for decimal or $`).

   ![Dues Amount Image]

   NOTE: If the membership is free, enter “0” for the Dues Amount field. Free Memberships do not require any billing/credit card information to be provided. *(Quick Tip: The Dues Amount field can only be used to charge a flat fee or “base amount.” If you wish to create a Membership based upon criteria of a member like custom profile fields or demographic information, you’ll want to utilize the Characteristics-Based Dues Rules. Please review our Member Management notes series on “Dues Calculation rules” for more information)*

6. **Expiration**: Utilize this field to configure how long the Membership fee is good for to hold an active membership with your organization. There are 3 options:
   a. **None**: Select this option if the membership does not expire and to charge the corresponding Dues Amount fee one time only.

   ![Expiration Image]

   This option is often used for Lifetime Memberships. *(Quick Tip: The installment option is not available when “None” is selected for the Expiration field)*
b. **1st of Each Month**: Select this option if the Membership expires each month and you wish to charge a corresponding fee on the first of each month. This option allows the Membership to be renewed on the first day of each month regardless of the member’s registration or renewal date. Check the “Pro-rated” option if the dues amount should be adjusted for a member registering or renewing on a day other than the first of the month. *(Quick Tip: With Pro-Rated enabled for the 1st of each month expiration option, if the Membership amount is $100 and the member joins on January 15th, the member will pay $50 for the dues amount as the system will automatically calculate the pro-rated dues amount based on the date joined or date renewed)*

c. **Expires**: Toggle “Expires Every” to configure the Membership expiration to expire in a specific amount of “Days” or “Years” from when the member joins/renews. When “Year(s)” is selected, you have 2 options to determine when the member will expire:

i. **Anniversary Date Membership**: If the Membership expires each year and is based upon the date that the member joined, just utilize the Expires every toggle, enter the number of years & toggle “Year(s).” With members expiring 1 year from the day they join, no other settings need to be configured within this section.

ii. **Annual Renewal Date Membership**: If the Membership expires each year on a specific date that your organization determines, utilize the “Expires every: # of years,” toggle “Years” and select the Month & Date within the “For Renewal Date Use Only Options.”

For example, use this option if you offer a membership that is active from January 1st to December 31st.
1. The Annual Renewal Date option also allows you to offer a new membership grace period or automatic pro-rated dues amount.

2. With a grace period of “X” day(s) for new memberships – select this option to enter a desired number of days grace period.

   This grace period is the amount of days prior to the next year(s) expiration in which a new registrant or renewing member may purchase this membership and be granted access through the next year(s). (Quick Tip: For example, set your expiration to “1 year” with the first expiration on the 15th of July and a “30 day” grace period. A new membership purchased would be able to join/renew on July 1st (within the 30 day grace period) and his/her expiration would not expire in 15 days, rather 380 days because they had registered within the grace period window)

3. Pro-rated (Dues amount is automatically adjusted based on the day registered/renewed) – select this option if you wish for the dues amount to be adjusted based on the day the member joins/renews.

   The proration automatically occurs to the day and the dues amount value is automatically determined by the system. (Quick Tip: For example, set your expiration to “1 year” with the first expiration on the 15th of July & with pro-rated dues selected. If the membership dues amount is $100, and the member joins on the 15th of January the member will pay $50 for the dues amount as they are coming into the membership halfway through the year)

7. **Allow Installments**: Utilize this field to define if the membership can be paid in installments. When set to “Yes” the Number of Installments field is displayed. Enter the number of installments in which the membership amount can be paid during the duration of the membership (Quick Tip: The Pro-rated option for Annual Renewal Date expiration is NOT available when Installments are enabled).
a. Example: If you have an Annual Membership with 4 installments enabled, a new member/renewing member will be given the option to pay the full amount of the membership or pay by installment. For an annual membership of $120, this example would be 4 installment payments of $30 due every 3 months over the course of the yearly membership.

Quick Tip: If you are utilizing Real-Time Credit Card processing: The Auto-Renewal option is NOT available when “Allow Installments?” is set to Yes. Additionally, if utilizing real-time credit card processing, Credit Card & ACH/E-check accounts will be automatically charged when an installment is due.

8. **Renewal Date/Amount Calculation:** Utilize this field to calculate the member’s new expiration date for renewal. By default, the current date is used to calculate the member’s new expiration date.
   a. **Will be calculated from date renewed:** If selected, the expiration date will be calculated based on the date that the member renews their membership. *(Quick Tip: If using Annual Renewal Date expiration with pro-ration, we recommend selecting “Will be calculated from date renewed” to calculate the pro-rated dues amount. This will allow the prorating to occur on renewals that have expired and are not within the Expiration Grace Period)*

   b. **Will be calculated from previous expiration date if available:** If selected, the previous expiration date (even if the date has passed) will be used to calculate the member’s new expiration date. For example, if a member’s previous expiration date is 2 years in the past and they wish to renew, they will be charged for the 2 years that they were inactive or expired. *(Quick Tip: If using Annual Renewal Date expiration with pro-ration, selecting the “Will be calculated from previous expiration date if available” will override the pro-rated dues calculation and use the previous expiration date. In this case the pro-rating dues will only occur when a new member joins with the new member online registration process)*
9. **Expiration Grace Period**: Utilize this field to determine how many days members can continue to login to their member account and receive member benefits (ie: registering for events at member price) after their membership has expired.

Within this number of days the member is still considered expired & still has the ability to renew they will just also have the ability to login to their profile. However, once the amount of days of the grace period has passed, when a member logs into their profile they will only be prompted to renew their membership. *(Quick Tip: If the Membership is configured for installments, this Expiration Grace Period field will allow the member to continue to log into their account with a past due installment payment. For example, the expiration grace period is set to 5, member records with an installment payment less than 5 days past due will still be able to sign into their profile)*

10. **Availability**: Utilize this option to determine when members have the ability to pay this membership fee. You can configure a membership so that it is available only to new members during registration, existing members during renewal, or both.

   a. **Available During Registration**: Check this option to allow this membership fee to be available for new members joining your organization. If selected, this membership will be available for a new member to select when joining on the frontend during the online registration process.

      *(Quick Tip: It is HIGHLY RECOMMENDED to create the same Membership twice to track new members & renewing members. One that is ONLY available during registration, or for new members joining, and the other that is ONLY available during renewal. Setting up the same membership in this way will allow you to easily track new members & renewing members within your database)*

   b. **Available for Upgrade/Renewal**: Check this option to allow this membership fee to be available for existing members to pay at the time of their renewal. If selected, this membership will be available for selection when a member is going through the renewal process on the frontend of the site.

11. **Initial Membership Period**: The Initial Membership Period is available with Real-Time Credit Card processing ONLY & cannot be utilized if the Membership Availability is configured to upgrade/renewal. This allows you to set an initial membership dues amount & expiration for a specific Membership.
An Initial Membership period should be used when you would like to create any of the following membership scenarios:

a. A free trial period that will automatically roll over to a paid membership.
b. A reduced cost introductory fee that will automatically roll over to normal pricing.
c. A one-time activation fee followed by recurring membership fees.
d. Please review the additional rules & requirements for configuring an initial membership period below:
   
i. You cannot have an initial membership period for a free membership. *(Quick Tip: This meaning the Membership Dues amount cannot be 0)*
   
ii. Initial Membership expiration must be at least one day, event when creating a one-time activation fee scenario. *(Quick Tip: This is due to the fact that there is a delay between processing the initial payment and the first dues payment)*

iii. You MUST enable auto-renewal when using an initial membership period. *(Quick Tip: Auto-Renewal is available when real-time credit card processing is enabled on your site. For more information about payment providers & credit card processing, navigate to “Support” click on “Support Home & click on the “Real-Time Credit Card Processing” link within the Manage section)*

12. **Auto Renew**: If Real-Time Credit Card processing is enabled, utilize this Auto-Renew option to allow members paying via e-check or credit card to be automatically renewed when their membership is up for expiration.

![Auto Renew Option](image)

If a member selects a membership that is configured to auto-renew, the member does have the ability to cancel their membership within their profile to stop the automatic renewal payment. *(Quick Tip: When creating a membership with auto-renewal, any member that selects that membership will be forced into the auto-renewal process. If you wish for users to have a choice, we suggest creating 2 memberships: one membership that is configured for auto-renew & the other not. If your membership is configured to auto-renew we recommend including this within the name of the Membership, ie: “Student Member (Auto Renewal)” so that the user knows that they will be automatically billed)*

13. **Additional Seats**: Utilize this field only if this Membership will be attached to a Master Member Type configuration. The number entered within this field will dictate the amount of active sub-accounts associated with the Master record with this Membership.
This is especially useful for organizations that would like to allow multiple associates to join the community under a single master account who pays for the membership. *(Quick Tip: The maximum number of additional seats allowed is 999. Please review our notes documentation on the Master/Sub Configuration for more information)*

14. **Career Openings**: Utilize this field to set a desired number of career openings that members of this membership will be allowed to post within the Career Center feature.

When a membership expires the opening will not automatically expire, however, the member will not be able to access their openings or view applications submitted until they have renewed. *(Quick Tip: To allow unlimited postings to the career center, enter 0 within this field)*

15. **Member Pages**: Utilize this field to set a desired number of member web-pages that members of this membership will be allowed to create from within their profile.

Enter a numeric value to increase or decrease the amount of pages from the default of 10. *(Quick Tip: Member Pages are created within the member profile and can be made visible to other users. They can be used to allow the member to add additional information & content about themselves that is not otherwise contained within the member profile)*

16. **Prompt member for an additional donation**: If “Yes” is selected, a checkbox will appear above the submit button on the membership payment form asking if the member would like to make an additional donation after submitting their dues payment.

If the member checks the box, they will be automatically redirected to the Donations Fund page where an additional donation can be made. *(Quick Tip: If selected, the Donation Fund listing page will be the landing page after dues payment is submitted. Additionally, the Donation submitted will be submitted as a separate non-dues transaction. If the member elects to contribute an additional donation it will be performed through the Donations function within your site. To create Donation Funds navigate to “Ecommerce” > “Donations” > “Donation Funds” & click on “Add a New Fund.”)*

17. **Allow multiple outstanding invoices**: Utilize this option if you wish for a Membership Dues Invoice to be automatically created by the system for an expired member.
Selecting “Yes” will result in an Open invoice being automatically generated, regardless of their previous invoice status, if the member is currently expired & the member does not have an Open invoice for the current membership period. *(Quick Tip: This options is best if you wish to charge lapsed members for the Membership period that was missed)*

18. **Member Types**: Select the appropriate Member Type(s) that should be permitted to select & pay this membership fee. It is possible to select multiple member types for one membership.

However, it is recommended to have a single membership correspond to a single member type. For example, the “Student” Member Type has the “Student Membership Dues” configured. *(Quick Tip: You can also have multiple Memberships configured to a single Member Type; however, a member may only hold one member type & one membership. If Multiple Memberships are configured to a Member Type, the user will select which available Membership they wish to pay)*

19. **Modifiers**: If applicable, select the appropriate modifier(s) that should be available to select when members are paying this Membership fee. Membership Modifiers are simple calculations that you can create that will add an additional fee to your base Membership Dues Amount, taking into account specific responses provided by a member.

A Modifier must be created before it will be displayed in this list. To create a modifier navigate to “Ecommerce” > “Dues & Membership” > “Membership Modifiers” & click on “Add a New
Modifier.” *(Quick Tip: Please review the “Membership Modifiers” notes documentation to learn more)*

20. **Dues Calculation Rules**: If applicable, select the appropriate dues rule(s) that should be applied when members are submitting this Membership dues fee. Dues Calculation Rules are an automatic calculation to adjust the price of the Membership based on specific member profile field criteria. This differs from modifiers in that it is applied automatically and does not directly rely on the input of the member.

   To create a dues rule navigate to “Ecommerce” > “Dues & Membership” > “Dues Rules” & click on “Add a New Dues Rule.” *(Quick Tip: Please review the “Characteristics-Based Dues Rules” notes documentation for more information on how to properly utilize Dues Rules)*

21. **Promotional Codes**: If applicable, select the appropriate promotional code(s) that should be available when members are paying this membership fee.

   If promo codes are selected, the member will need to manually enter the code prior to submitting their membership dues payment. To create a Membership promotional code navigate to “Ecommerce” > “Dues & Membership” > “Promotional Codes” & click on “Add a New Promo Code.” *(Quick Tip: Please review our “Membership Promotional Codes” notes documentation to learn more)*

22. **Description**: Utilize the content editor to enter a description of the Membership. Any content added within the description section will be visible to the member during the join/renew online process. *(Quick Tip: It is highly recommended to include thorough explanation of the membership within this area so that members are informed of any fees, term & benefits of holding this membership with your organization)*

23. **Submit**: Click on the “Save” button to create & save the Membership.
Managing Memberships

Once your Memberships have been created, you can edit memberships, manage the membership configurations & renewals as well as view the associated membership dues transactions administratively. This section of the document will focus on those areas.

**Navigate** to “Ecommerce” > “Dues & Membership” & click on “Memberships” to view all existing Memberships.

Membership Options

1. **Add a New Membership**: Select the “Add a New Membership” link to create a new Membership.

2. **Edit**: Click on the pencil edit icon to the left of the Membership name to edit the membership settings (the settings explained previously in this document).

3. **Membership Configuration**: Click on the wrench icon to manage the Membership configurations for the corresponding membership. The Membership Configurations allow you to set the Membership renewal period as well as configure automatic renewal email reminders (These configurations will be explained within the next section of the document).

4. **View Associated Dues Transactions**: Click on the view icon to the view the dues processing page listing all Membership Dues transactions for the corresponding membership. This allows you to view, record/process payments & close dues transactions. *(Quick Tip: Please review our “Accounting” notes documentation for further information on recording/processing payments)*
Membership Configuration

You can utilize the membership configuration tool to set the number of days in advance existing members may renew their membership as well as configure automatic renewal email reminders to be sent. Click on the wrench icon to the left of the corresponding membership to set these configurations.

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<th>Membership Type</th>
<th>Price</th>
</tr>
</thead>
<tbody>
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<td>Annual Individual</td>
<td>$11.00</td>
</tr>
<tr>
<td>Annual Chapter</td>
<td>$111.00</td>
</tr>
<tr>
<td>Annual Member</td>
<td>$201.00</td>
</tr>
</tbody>
</table>

1. **Advanced Renewal Reminder**: The Advanced Renewal Reminder section allows you to configure the number of days in advance existing member may renew their membership & configure 2 automatic renewal email reminders.
   a. **How many days in advance can memberships be renewed**: Utilize this field to enter the desired number of days in advance a member may renew their membership & generate an invoice for the next membership period.

   For example, if you enter “30” then a member may renew their membership up to 30 days before the expiration date within their profile. *(Quick Tip: If you are utilizing ANNUAL RENEWAL DATE for your Membership expiration, it is recommended to set the “number of days in advance the Membership can be renewed” to either the same amount of days or less to that of the “Grace period for new memberships.” This will ensure that members who renew early will receive the appropriate new expiration date after their dues transaction has been closed. The system will automatically add the additional duration from the member’s expiration date, not the date when the member renews)*

   b. **Send a reminder via email**: Toggle “Yes” if you wish to send an email notification to your members reminding them to renew and that they are coming up for expiration.

   If selected, an email notification will be sent automatically to members on the day before their membership expires *(Quick Tip: This is directly dependent on the date in the “Date Membership Expires” field within the member profile. Members who have already renewed before this date will not receive a membership renewal reminder email notification)*

   c. **How many days in advance**
should a reminder be sent: Toggle “Yes” if you wish for a Membership renewal reminder email notification to be sent a certain amount of days prior to the member expiration.

Enter the desired number of days in advance within the field to send the renewal reminder notification for the Membership. For example, if you enter “21,” then members will receive an automatic renewal reminder notification email 21 days before their Membership expires. (Quick Tip: This advanced reminder is sent in addition to the reminder that is sent one day prior to membership expiration. This field is ignored if you toggle “No” for the “Send a reminder via email?” setting)

d. Use Custom reminder email content: If you choose to send automatic membership renewal email reminders you can utilize this field to customize the message of the email reminder that will be sent.

If “Yes” is selected, the custom membership reminder content entered within this area will override the default notification message content. (Quick Tip: If custom email reminders are not utilized, the same default membership renewal email reminder will be sent for ALL memberships. The default Membership renewal reminder notifications can be managed by navigating to “Content & Settings Menu Tab” > “General Settings Section” & clicking on “Notifications”)

i. Custom Subject: If “Yes” is selected for “custom email reminder content,” then this will be the subject displayed within the email notification that is received by members in advance of their expiration date.

Enter a subject line within the field that will draw attention for members to renew. For example “Your membership is expiring in @@MEMBERSHIP_EXPIRE_DAYS@@ amount of days.” (Quick Tip: Macros are available for the Subject line. Available Macros are explained later in this document)
ii. **Custom Message**: If “Yes” is selected for “custom email reminder content,” then any content entered within the Content editor will display as the custom message within the email notification that is received by members in advance of their expiration date. The content editor allows you to create hyperlinks, insert images and other rich text material within the email message. *(Quick Tip: Macros are available for the Custom message. Available Macros are explained later in this document)*

2. **Last Day Renewal Reminder**: If you choose to send automatic renewal email reminders you can utilize this field to send a customized message of the email that will be received by members on the last day before their membership expires.

   If “yes” is selected, the content added within the Custom Subject & Custom message will override the default notification message for the Last Day renewal reminder. *(Quick Tip: If custom email reminders are not utilized, the same default “Last Day” membership renewal email reminder will be sent for ALL memberships. The default Last Day Membership renewal reminder notification can be managed by navigating to “Content & Settings Menu Tab” > “General Settings Section” & clicking on “Notifications”)*

3. **Post Expiration Renewal Reminder**: Utilize this area to configure and send a post membership expiration email renewal reminder. If “Yes” is selected, an automatic email will be sent to those members who have expired and not yet submitted a new membership dues payment a certain amount of days after their current expiration date. *(Quick Tip: The post membership expiration email renewal reminder is directly dependent on the date in the “Date Membership Expires” field within the member profile. Members who have already renewed will NOT receive a post membership expiration renewal reminder email notification)*
a. **How many days after should a reminder be sent**: Utilize this field to enter the desired number of days after the member expiration date you wish the system to send the automatic renewal reminder email notification to members. For example, if you enter 30 days, any member who has not yet renewed will receive the post expiration renewal reminder 30 days after their membership expiration date. *(Quick Tip: We recommend setting the number of days for the post expiration reminder in accordance with the Expiration Grace Period, if applicable, within the Membership settings. If you allow for an Expiration Grace Period, which allows expired members to still login and gain access, you can coordinate this post expiration renewal reminder to be sent right before the Expiration Grace Period ends letting those expired members know they will be losing their “grace period” access)*

b. **Use custom reminder email content**: If you choose to send the automatic post expiration renewal reminder email notification you can utilize this field to customize the message of the email that will be sent.

If “Yes” is selected, the custom post membership expiration reminder content entered within the “Custom Subject” & “Custom Message” areas will override the default notification message content. *(Quick Tip: If you do not utilize the custom post expiration renewal reminder, the same default post membership expiration renewal reminder will be sent for ALL memberships. The default Membership renewal reminder notifications can be managed by navigating to “Content & Settings Menu Tab” > “General Settings Section” & clicking on “Notifications”)*

4. **Available Macros**: If utilizing the renewal reminder emails & you choose to customize the content of those notifications (Advanced Renewal Reminder, Last Day Renewal Reminder, Post Expiration Renewal Reminder), we strongly recommend adding the available Macros into the
content message of the notifications. The available macros can be found within the table at the bottom of the page below the “Save Changes” button.

Macros allow you to make the message of your email content more personable. Simply copy the ENTIRE macro as it exists within the table and paste within the editor. Then when the email reminder is received, the macro will populate with the correct information.

(Quick Tip: You must copy/paste the macro exactly as it appears. Otherwise the macro will not function properly when received within the email. Additionally, only the macros listed within the table are the available macros that can be used within these notifications. It is not currently possible to add additional macros)

Member Management – Memberships

This concludes the “Memberships” section of the Member Management Configuration notes documentation series. Be sure to continue to the next document which covers “Membership Modifiers.”

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