



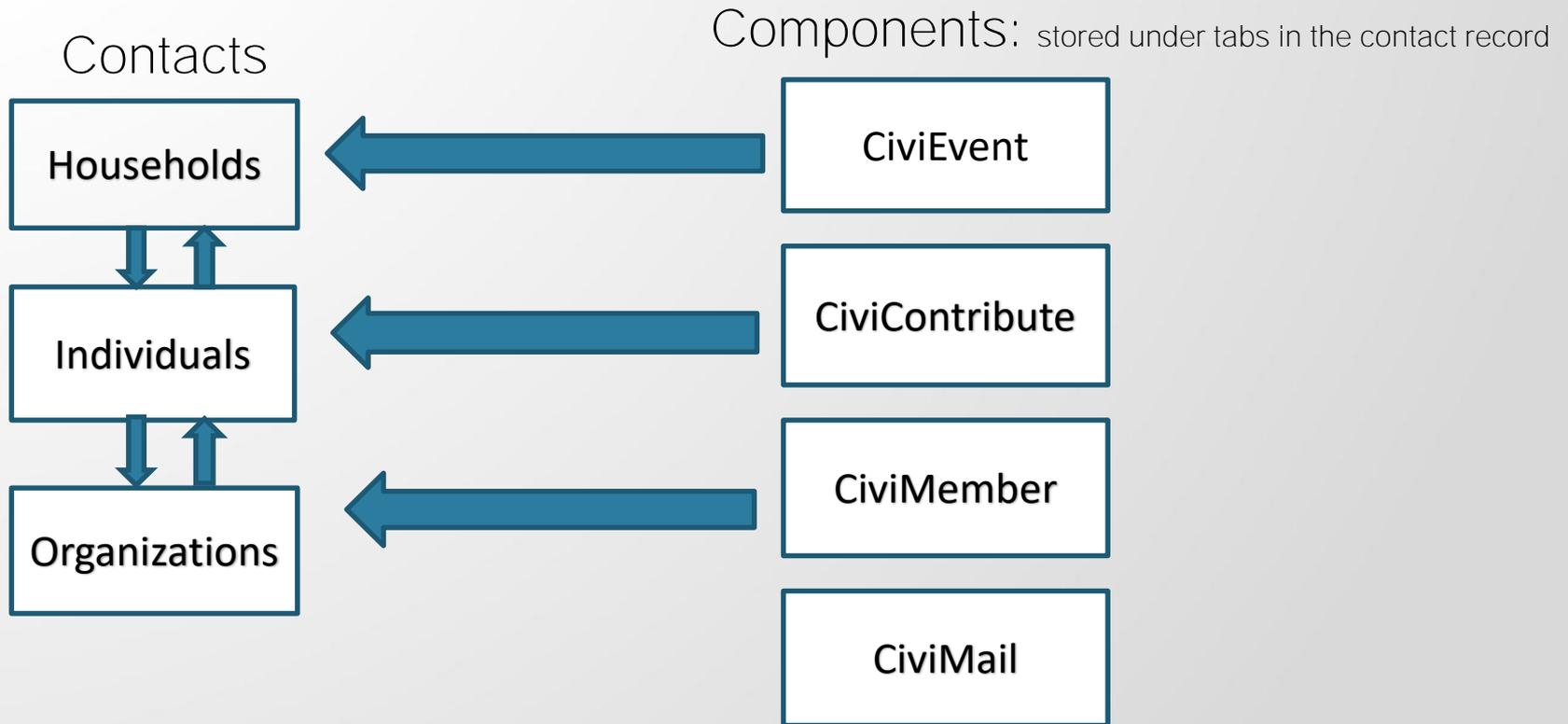
cloud solutions for nonprofit organizations

Membership Management with CIVICRM



1. Membership Types, Status and Rules
2. Tracking Membership: Dashboard & Searching
3. Membership Dues (contributions)
4. Manually Recording a Membership
5. Creating a Drupal User for members
6. Manually renewing a Membership
7. Online membership Signup and Renewal pages
8. Membership Reminder emails
9. Membership reports

Data in CiviCRM is organized in tables



Membership Types

Decisions to make before creating a new membership type

- To which organization or chapter of your organization does this membership apply?
- What are the membership fees?
- Duration and period type?
- Fixed: Fixed Rollover Date

Membership Status Rules

- Three important membership dates

CIVICRM



- Join Date (Member Since . . .)
- Start Date
- End Date

- “System” managed status – status changes automatically based on rules in the CRM

- New
- Current
- Grace
- Expired

- “Manually” managed - overrides the system
ie. If you know a member does not want to renew

Tracking Membership: Dashboard

- Displays a summary of current memberships per membership type (Last two months/YTD/Current)
- *Current* shows the active members (status: new, current, and grace)
- Shows the total number of new/renewed members

Exercises

Tracking Membership: Searching

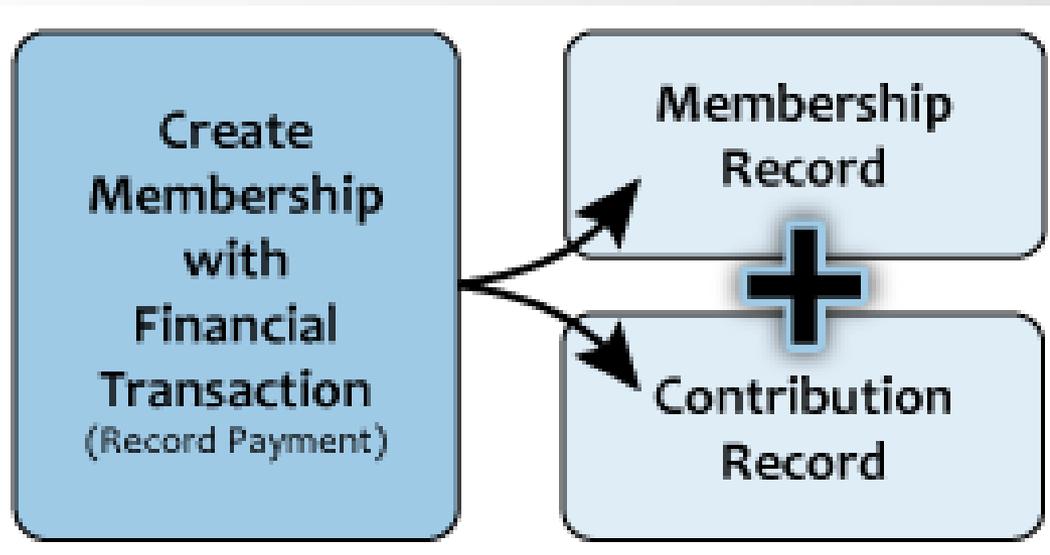
- Find Memberships: component search that results in membership records
- Advanced Search: contact search that displays contact records based on membership information
- Creating a smart group of active members

Exercises

Membership & contributions (member fee)

- “Membership” is an ongoing historical record of the contact’s *member* relationship with your organization
- The membership fee is stored as an associated, but distinct “contribution” record
- Over time, a single membership will have a history of “contributions” (membership renewals) but only one membership record

Membership Payments



Recording new memberships manually



- Membership > New Membership (search for an existing contact or add a new contact)

OR

- Go to the existing contact record, click on the membership tab and add a new membership
 - Can process credit card from here depending on your payment processor
- Option to record associated payment
- Option to send confirmation and receipt

Creating a Drupal User

For documentation on Drupal User Management and step by step instructions, go to:

http://doc.arcsfoundation.org/drupal_docs/CreatingDrupalUsers/

- Create a Drupal user for all Members and Scholars
- Existing CiviCRM contacts – Create a Drupal user and use the same email address as the one in CiviCRM
- New contacts – Create the Drupal User and it creates the CiviCRM contact at the same time
- Access the People Page in Drupal (User Management) and click on Add User
 - User Name, Email Address, temporary Password

Renewing a membership manually



- Click on the membership tab in the contact record, click on “More” and choose the **renew** option
- Creates a new contribution, but **not** a new membership
- Renewing an expired membership changes the start and end dates of the existing membership
- Renewing a current or grace membership does not change the start date, but it does change the end date by extending it.
- Never delete a membership

Exercises

Join/Renew online



- Use an online contribution page
- Select membership types to offer
- Self-service renewals
 - CMS integrated: Page will show existing membership if user is logged into account
 - Standalone: Page will show existing membership if user clicks on emailed link

Special Link for membership renewal

- A special link to the membership page
 - Internal contact id token `{contact.contact_id}` identifies the specific contact record
 - Checksum token `{contact.checksum}` which functions as a password to allow the contact to access their personal information
- Allows the member to update their contact info and renew their membership.
- The link is active for seven days (can be resent)
- Example of special link:
...../crm/index.php?q=civicrm/contribute/transact&reset=1
&id=1&cid={contact.contact_id}&{contact.checksum}

Exercises

Renewal Reminders



Administer > Communications > Schedule Reminders

- Helps your organization retain members
- Emails sent automatically based on certain parameters
- Can configure any number of "schedule reminders"
- Criteria is varied and can be based on membership type, join/end date, etc.
- Can be limited to send only to participants with the permissioned relationship

Exercises

Membership Reports



- **Summary Template:** shows membership contributions (no specific names) grouped by frequency or membership type
- **Detail Template:** shows membership details for each member
- **Lapsed Template:** provides a list of memberships that have lapsed or will lapse before the specified date

Exercises