

Membership Management (Membership Contact Store event type)

Last Modified on 08/01/2024 10:16 pm EDT



Want to jump to a particular section? Use the contents tab to the right of this article

You can use the membership features within EventsAir to provide ongoing membership management services to small or medium organizations. These services may include:

- Collecting annual membership dues (either on a set annual date for all members, or on each member's anniversary date)
- Storing up-to-date member contact data
- Setting up and keeping track of invoices and receipts, payment schedules, cancellation schedules and unique member discount codes
- Member communications and surveys
- Downloadable forms and documents
- Invitations to events, functions and meetings (plus attendance tracking)
- A self-service member portal for sign-up, payments, renewals, course and contact detail updates
- Continuing education/professional development management - invitations, registrations, and member history tracking plus payment collection, class/event calendar and course attendance (using CE Course technology)
- Member merchandise sales

You need a unique Membership Contact Store for each association/client who needs membership management.

A Membership Contact Store is a particular type of 'event' within EventsAir.

A Membership Contact Store event is a bit different to other events. It allows you to manage association memberships, using the following **modules**:

- **Contact**
- **Notes**
- **Marketing**
- **Survey**
- **Membership** (this module is **ONLY** available in 'events' created as either a Membership Contact Store or CE Course Contact Store)
- **Functions**
- **CE Courses** (if enabled)

You can also set up these **features** within a Membership Contact Store type event:

- **Accounting**

- Packages
- Project Manager
- Run Sheet
- Name Badge Editor
- Custom Fields
- Reporting
- Online (sites & portals)
- Communications
- Alerts
- Express Actions

Creating a Member Contact Store

Each Member Contact Store and related Membership Module must be unique to one specific association. It's where you define specific details for that association: membership rates, discount codes, payment/cancellation schedules, and other settings.

The Membership Module is also the hub of all communication and member management processes, including tracking attendance history.

To help you automate processes, EventsAir will differentiate between:

- **Financial Members** — members who've paid (partly or in full) their membership fee **for the current membership year**.
- **Non-Financial Members**— members in good standing **for the current membership year** who have NOT yet made a payment against their fee.
- **Non-Current Members** — people in the association database who've previously been financial members **and/or** whose current year membership fee status is **CANCELED** (either by request or for non-payment).
- **Non-Members** — contacts in the Membership Module who aren't actual members of the association (and **never have been**), **and who have no membership fee type attached**. For example, they may be part of a wider marketing mailing list but shouldn't have access to membership-only content/pages on the Member Portal).

You can set up your own structure using categories such as associate members, VIP members, honorary life members etc.

But the member statuses listed above are important to understand because they determine certain processes within EventsAir (such as the Express Actions that relate to renewal and cancellation of membership).

Also, when you link a Member Contact Store to an external event, and want to set up registration permissions, you choose from this list.

To set up your first Membership contact store and Membership Module, choose "Member Contact Store" as the Event type when creating the event.

Event

Details Modules External Connections Access Rights Invoice Header Custom Fields

Name* JS test event (Membership)

Type* Event

Alias* Event

Start Date* CE Contact Store

End Date* Member Contact Store

Event Location Time Zone* Clear Selection

Under optional modules, select “Membership” (and CE Courses, if needed).

Event

Details Modules External Connections Access Rights Invoice Header Custom Fields

Name* JS test event (Membership)

Type* Member Contact Store

Alias* JS test event (Membersh ✓
<https://centium.eventsair.com/js-test-event-membership>

Event Location Time Zone* (UTC+10:00) Brisbane

Event Currency* Australian Dollar - AUD

Enable Multi-currency

Office* Brisbane Office

Country List* Testing Country List

State

Country

Unique Code

Event Logo Image Add (Automatically resized to 400px wide)

Optional Modules

- Membership
- CE Courses
- CE Courses

Authorizing costs (Membership and/or CE Courses)

Creating a Member Contact Store event (which adds the Membership module) may incur extra charges, depending on your EventsAir subscription.

Likewise, creating a CE Contact Store event (or adding the CE Courses module to an existing event or contact store) can incur an extra fee.

Optional Modules

- Membership
- CE Courses
- CE Courses



When enabling these options, you'll see an authorization screen that lists the cost for your region. There is usually a minimum 12-month commitment. You need to accept the authorization to install the functionality.

If you have questions about pricing or the best option for you, please contact your account manager.

Membership module setup

Once you've created your Member Contact Store event, in the **Setup Panel**, under the **Membership** module, you'll find:

Preferences

(More details in separate section below).

Set the start month and day for the membership year (for example, January 1). This is used to work out when annual renewal payments should be processed (or calculate pro-rata membership payments if you've enabled this).

Payment and Cancellation Policy

(More details in separate section below).

Define schedules for payments, such as 50% deposit and 50% within 30 days) and what refunds, if any, may apply if a member cancels partway through their membership year.

Membership Category

(More details in separate section below).

Set up membership categories, such as Full Member, Student Member, Non-Member and more. A category could also be something members purchase (merchandise, books, functions). You can also set up functions such as dinners here as a membership type. For each category, you need to define at least one fee type, even if there's no charge for that specific membership category.

Membership Discount Codes

You can create discount codes here with many different options — type of discount, availability, what they can be used for (e.g. for merchandise purchases, for payment of membership fees etc.)

[Read more about Discount Codes here.](#)

Payment and Cancellation Policy

You can define **membership-specific** payment and cancellation schedules and terms. Both of these are optional. You can choose to apply them to all membership categories in this 'event' (contact store), or leave them out/override them for certain membership categories.

[Read more about Payment & Cancellation Policies here.](#)

Membership Category and Fee Setup

Setting up Membership Categories

This section lets you define membership **categories**, such as Full Member, Student Member, Non-Member and more. For each category, you need to define at least one fee type, even if the fee is 'inclusive' or 'complimentary'.

- Remember, regardless of your categories, EventsAir will distinguish between different membership **statuses**: those who've paid this year's membership, those who haven't, those who aren't current, and those who've never been members. [Financial Members, Non-Financial Members, Non-Current Members, and Non-Members.]
- Categories can be used to define access to the Member Portal, although you can also filter on other fields. The main purpose of categories is to organize your membership structure, and allow you to add other items for purchase.
- You can set up your categories however you like. For example, you may have an annual membership category, with one full price fee type and a reduced fee type for students. Alternatively, you can set up Full Annual Member and Student Annual Member as two different categories.
- Each category can have more than one fee type.
- **Membership Item vs. Non-membership categories** — you may want to make some items (including functions, courses, and merchandise) visible to non-members by creating extra pages on your membership portal, with the access set to include non-members. You can include non-membership items in your membership categories.

In the Membership Module, use the + next to Membership Category to add a new category.

Name the category, then under it, add at least one Fee Type.

Add Membership Fee Types

Use the + icon to add a new Fee Type to a Membership Category.

Give the Fee Type a name, such as the name of the membership category (this could include any categories you've

set up to cover other items, such as a Membership Book)

Type: either One Time Charge or Recurring Charge as appropriate

- **One Time Charge** — Use this for an item such as merchandise which will only be charged once (not on a recurring basis).

For a one-time charge, you'll also enter the amount.

- **Recurring Charge** — Use this for items like membership fees that will be charged regularly (for example, annually, either on a fixed renewal date or on a member's anniversary date).

For a recurring charge, you'll also enter:

- **Initial amount** (first time membership)
- **Renewal amount** (if you the fee is reduced for someone renewing their membership)
 - **Default Start Date** — When setting up a recurring fee type, you can set the start date as being either:
 - today (current day)
 - start of current month, or
 - start of next month.
- **Type** — define how renewals are managed:
 - **In __ month(s)**. 12 months is the default (renewal occurs on the individual member's anniversary date).
 - **Annual On** — defines a common renewal date for all members, such as January 1.
 - **Apply Pro Rata** — If you set a fixed renewal date, you can offer discounted membership depending on what portion of year remains. For example, if the membership year begins on January 1, a member joining on July 1 would only pay half the annual fee.

Other modules in a Member Contact Store event

You may also want to make use of features you'd use in other events, such as Notes and Marketing Tags, Contact searching and filtering, Surveys and Functions, Reporting and Project Management. You can do this just as you would for other events.

CE Courses

Just as for other events, you can add CE Courses to your Membership Contact Store event. This can include ongoing scheduled classes as well as one-time classes, seminars or other educational functions. CE Courses are displayed in the Member Portal, so members can purchase classes, view purchase history, and search for upcoming educational programs. [Read more information about CE Courses here.](#)

Membership Express Actions

The Membership Module includes a selection of Express Actions. Many are the same as found in a standard event's Express Actions, but also included are two specific Express Actions for member management:

Membership Renewals

The Membership Renewals Express Action lets you, on a specific date (such as the first of each month), filter for memberships with specific start or end dates (and target for other criteria), choose members and renew their memberships in bulk. You can send Membership Renewals in a Merge Doc to these selected for Membership Renewals.

Of course, it's always possible to manually create a membership renewal for specific members without using this Express Action.

Non-Financial Member Cancellations

A Non-Financial Member is one whose membership has been renewed for the current year, but who hasn't paid (or made a part payment towards) their membership.

Once a membership renewal has been created for a member, there'll be a NEW membership record for that member for the year, showing a payment status of purchased but NOT paid.

At a pre-determined date, members who have NOT paid will be canceled and the system will consider these members as Non-Current Members.

Again, you can always manually change a member's record to canceled without using this Express Action.

The Member Portal

You can create multiple Member Portals if you wish, and filter access-based information recorded within any module within your Member Contact Store, including event attendance history.

Home Member Training Materials Membership Enhancements

Alan Johnson

- Member Renewal
- Member History
- Search
- Calendar
- Shopping Cart
- Update Details
- Current Schedule
- Sign off

Welcome to the Sunshine and Rehabilitation Association Website!

We appreciate your support of our children and families! As you know, STAR is dedicated to helping children suffering from debilitating and often fatal diseases by helping the participate in the world around them.

From our monthly parties and family support programs to our coordinate with Make-a-Wish and Child Success, we are focused on bringing joy and success to every child we connect with.

Please use this site to locate your volunteer materials and update your membership details, as well as renewing your membership.

Also, this is where you can sign up for classes and check the calendar for upcoming programs.

The Member Portal is the one-stop-shop for members to:

- Apply for new membership or renewal of membership
- Update contact details
- View their current schedule
- Search for new classes (if connected to CE Courses)
[Classes and functions managed by the CE Portal can also include assignment of earned credits and certificates of completion.]
- Visit links to upcoming events, meetings or conferences (using a connected Event)
- View and search a calendar to see upcoming functions, courses, events etc.
- Make purchases (courses, memberships, merchandise etc.) via the Portal Shopping Cart
- See past purchases
- See other content such as downloadable forms, event info pages, merchandise and more

You can create pages that are accessible to the public (non-members), member-only pages, or pages that are only visible to certain membership categories.

Setting up the Member Portal

Many of these features are designed for use with a connected CE Courses module.

In the Online Panel, choose Member Portal.

Details Tab Settings

- App Name
- Alias – set the unique portion of the URL here
- Copy URL and Copy QR Code – click on the desired button to copy the URL or QR Code to your clipboard

- **Brand** – select your desired Brand, set up in the [EventsAir Brand Editor](#)
- **App Live From & To Dates** – choose the date range that users can access this portal

Authentication — you can filter access to this portal based on ANY type of field recorded in your Member Contact Store, not just membership category.

- **App Pre-Open** – define the Heading and Message shown before the portal is live
- **App Closed** – define the Heading and Message shown after the portal has closed
- **Analytics View** – enter your Google Analytics account information here

Content Tab Settings

- **Home Page** – a simple welcome page where you can include any necessary instructions, or messages to all members
- **Search Page** — Lets you choose what CE Course classifications to include in the search feature, if CE Courses are connected. This section also lets you limit the number of search results and manage button text and text on the page.
- **Join Page** — Lets you define content and links to a Join Interactive Site (a registration site set up for new memberships to be created).
- **Shopping Cart Page** – also includes:
 - Number of Suggested Courses to show – by default, this list will show 10 Suggested Courses.
 - Payment Interactive Site – choose the existing Interactive Site that will be used for Payments.
 - Confirmation Email Merge Doc – choose the Merge Doc that will be used for Confirmation Emails.
 - Enable Waitlist – if an item's inventory level is getting low, you can choose to put further bookings on the Waitlist. Then, one of your staff can later use the [Waitlist Management Express Action](#) to manually choose which people on the Waitlist should receive tickets. To learn more about Waitlists, see our article on [Waitlist Management](#).
- **Calendar Page** — you can define headings and buttons here
- **Sign-in Page** — lets you modify headings, page text, navigation text and link to a New Account Interactive Site
- **Update Details Page** – also includes:
 - Update Details Interactive Site – choose the existing Interactive Site that will be used to Update Details.
- **Upcoming Events Page**
- **Event History Page**
- **Credits Page** – also includes:
 - Module – this field narrows down the list of reports for the next setting, Certificate Report.
 - Certificate Report – choose any report to print under Certificate on the Credits Page.
- **Event Detail Popup**
- **Member Renewal** — lets you manage content and link to a Payment Interactive form/site.
- **Member History**

- Generic Buttons and Labels

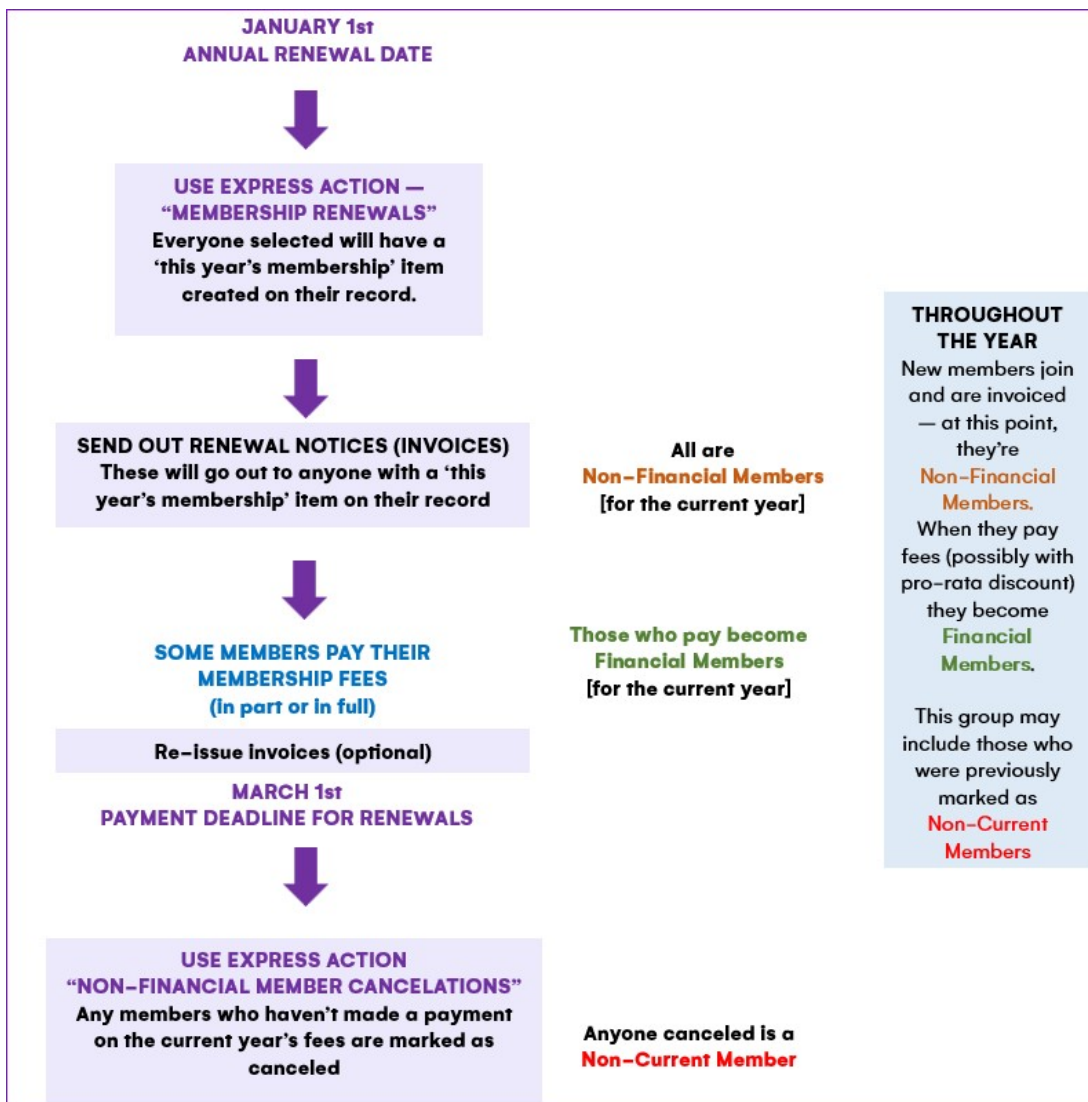
Understanding the Member Renewal Process

Every association or non-profit will determine their membership renewal processes. For example:

- Renewal can occur on a member's anniversary date, (a year from the date they joined — or you can create membership renewals based on 3-monthly or 6-monthly renewals, or any other number of months).
- You can start a membership on the first day of the current month or upcoming month.
- Renewals can occur on a fixed calendar date, such as January first of each year.

There are several stages to a typical renewal process, based on the decisions and processes of the specific association management team. Members are defined by their status within the renewal cycle (Financial, Non-Financial, Non-Current Members) or they're non-members (in the database but not members and never have been).

The flowchart is a generic example of how an association could manage a renewal process. (It's not how you have to do it, though.)



Linking to Interactive Sites and other events

Like Contact Stores and CE Stores, you can link a Member Contact Store to another event.

Once the connection between an event and a contact store is made, it cannot be changed.

When creating the event (or later, by going back to Event Preferences), you can connect a Member Contact Store (as long as you have access to it from the same office your event is in).

The screenshot shows the 'Event' configuration page with the following fields and values:

Field	Value
Name*	[Empty]
Type*	Event
Alias*	[Empty]
Start Date*	12/12/2023
End Date*	13/12/2023
Event Location Time Zone*	(UTC+10:00) Brisbane
Event Currency*	Australian Dollar - AUD
Enable Multi-currency	<input type="checkbox"/>
Office*	Please select...
Country List*	Please select...
Clone From	Please select...
Event Group	Please select...
Venue	[Empty]
City	[Empty]
State	[Empty]
Country	[Empty]
Unique Code	[Empty]
Contact Store	Please select...

A red arrow points to the 'Contact Store' dropdown menu.

This connection allows associations to send event invitations to member contacts, including sending Auto Login Tokens.

Event attendance is recorded on the member's contact record (of the Member Contact Store).

Registration Type options in events connected to Membership

When creating an event that you want to connect to a Member Contact Store, you can define which Member Types can access a specific Registration Type. The options below are available only in events that are connected to a Membership Contact Store.

You'll find them in the Advanced section of a specific Registration Type's setup panel.

Registration Type Setup

Details **Advanced**

Unique Code

Visible for

- All
- Financial Member
- Non Financial Member
- Non Current Member
- Non Member

You can choose which Member Status(es) can select this specific Registration Type.
