Membership Management FAQs

Page

What is Membership Management?

Membership Management is the new feature that was added to GoMembership v2.1. With this feature Administrators are able to add and update their memberships (licences).

How do I access Membership Management?

Once you are logged in, you will find in the Administration Area a tile called Membership Management. Click the Membership Management tile from either your Home page or via the Menu.
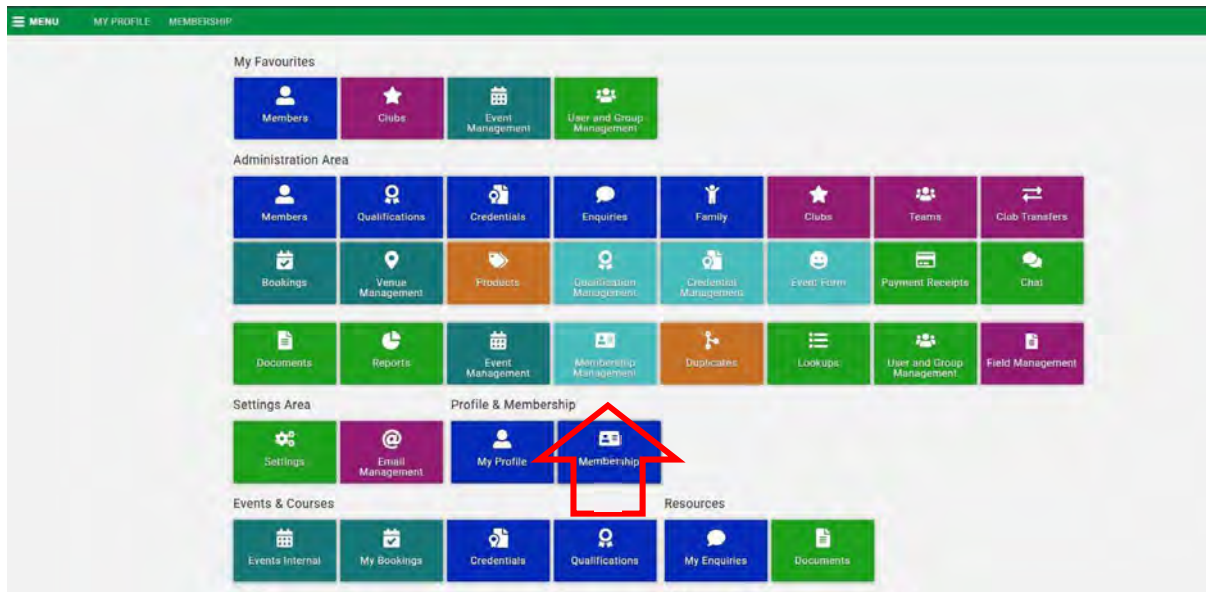
This displays all your memberships (licences) and can be summarised by Category or Status.

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What is a Category?

Membership Categories are a method of grouping different memberships which will help your members locate the memberships that they want to buy. It also separates between Club Affiliations and Memberships.

How do I add a new category?

To add a new category click on the Membership Categories button and then click on Add new category.

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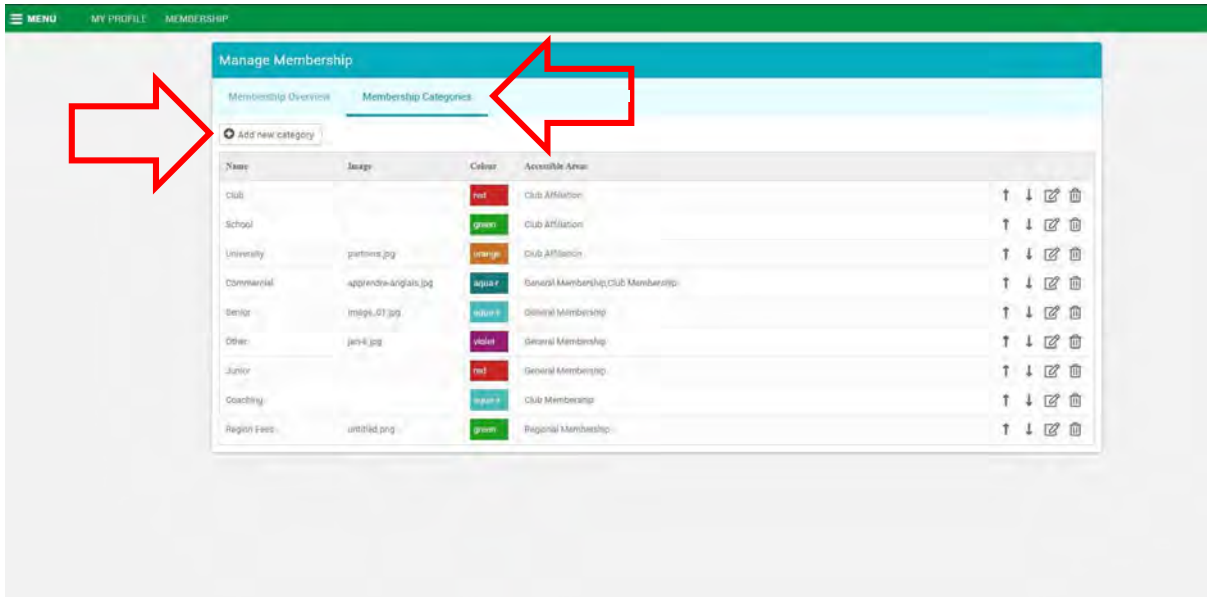
A new category record will appear at the bottom of the page.
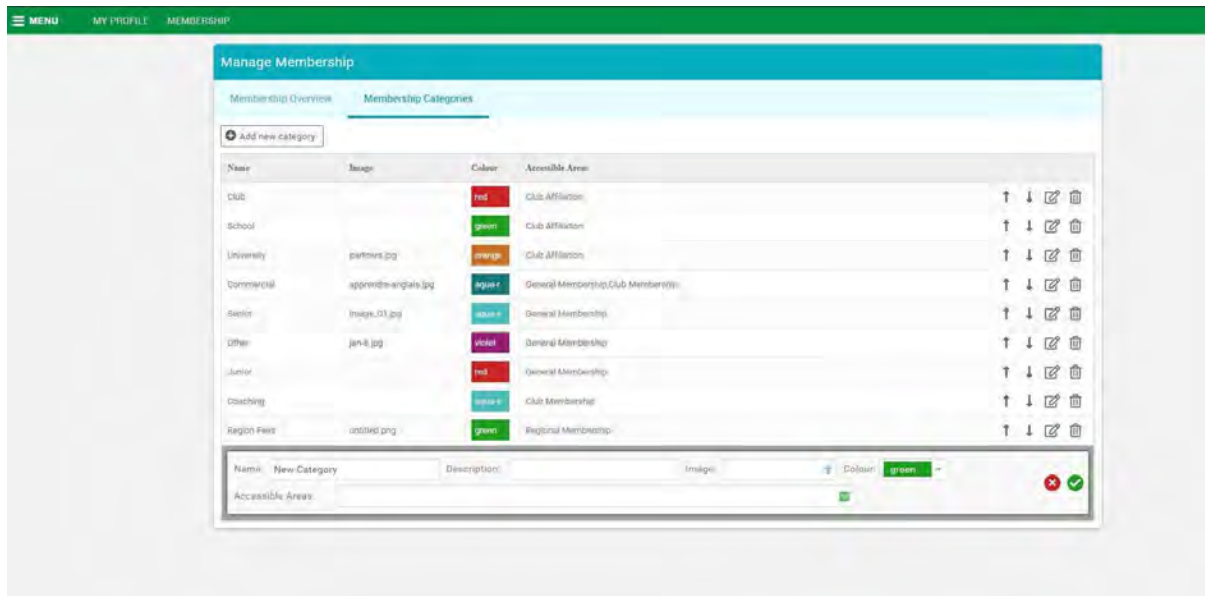
- ■ Enter the name of the Category.
- ■ Description is an internal reference to the category.
- ■ Image allows you to upload an image which will be shown as a watermark style background on the category page presented to the member.
- ■ Colour is a drop down list of the available system colours that is presented to the member when they are browsing memberships.
- ■ Accessible Areas allows you to differentiate the category between NGB membership, Regional membership, Club Memberships and Club Affiliations

Use the green tick to save changes or the red cross to discard changes.

Can I edit a Category?

Yes you can edit a category. Click on the Edit button against the category that you want to edit which expands the category's details.

Use the green tick to save changes or the red cross to discard changes.

Can I change the sequence of Categories?

Yes, there are sequence buttons (up and down) that you can use to change the position of the categories when displayed to the member.
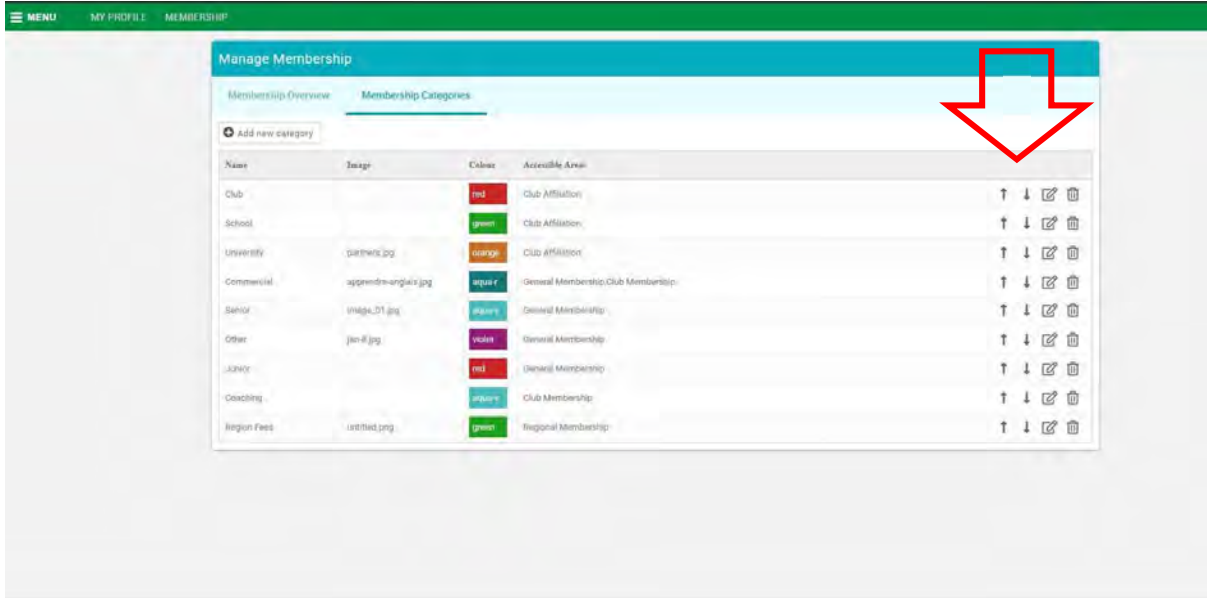
The sequence is only appropriate within the Categories Accessible Areas, there is no need to group together Member Categories, Club Member Categories, etc.

Can I delete a Category?

Yes you can delete a category if it is not required. Note however, that if the category has memberships (licences) linked to it you will need to re-link those licences to an appropriate category for your members to be able to see it/buy it.
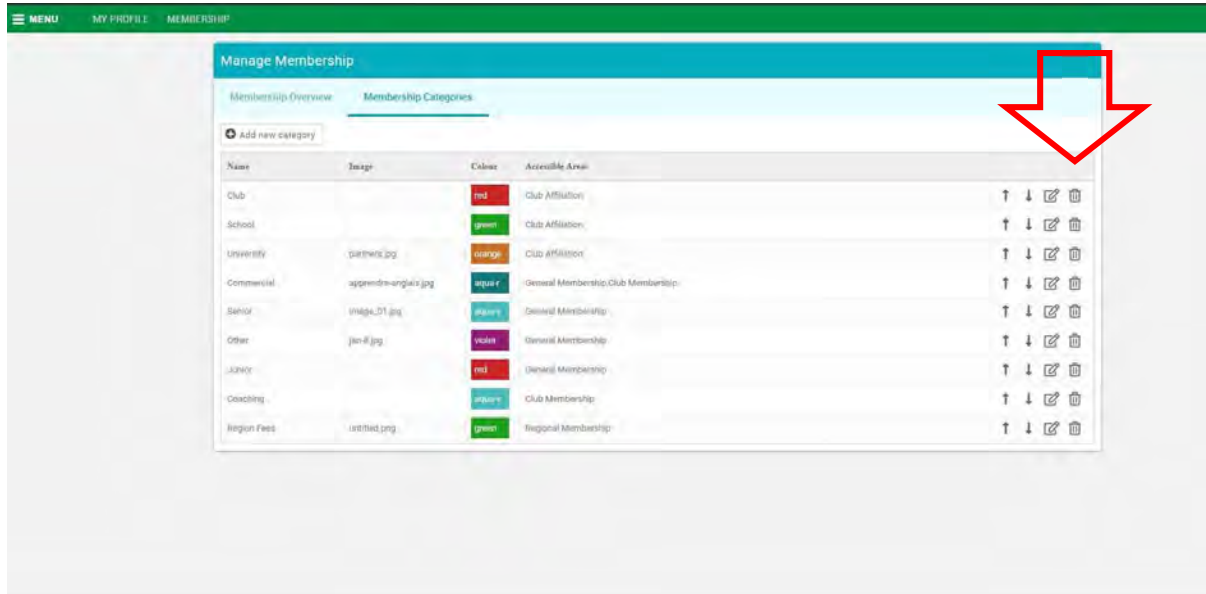
To delete a category click on the delete icon at the end of the row.

How to add a new Membership?

To add a new membership click the Add New Membership button on the left hand corner on top of the page.

You will then be directed to a new window.

The process is divided into 6 sections outlined below.

Membership Details

This is the section where you can add the basic details of the membership.

- Membership Name is the name that is presented to the member.
- Category is a drop down list allowing you to select the category this membership should be displayed in.
- Disable Bulk Renew excludes this membership being available in the Bulk Renew process
- About this Membership will appear to the member via the More Info section. When a member selects the membership, it will also display in an opening paragraph. This should explain to the member more information about this type of membership.
- Hide About Membership tick box allows you to hide the More Info option displayed underneath the membership.
- Colour is a drop down list of the available system colours that is presented to the member when they are browsing memberships.
- Membership Image allows you to set/update the image displayed on the membership.
- How long is the membership valid for allows you to specify the duration of the membership.
- Membership to start on allows you to set the start period of the membership.
- Hide Membership Duration tick box allows you to choose to hide the duration of the membership from the member at the time of purchase.
- How many days before a membership expiry is it available for renewal allows you to restrict members from renewing this specific membership until a specific time.
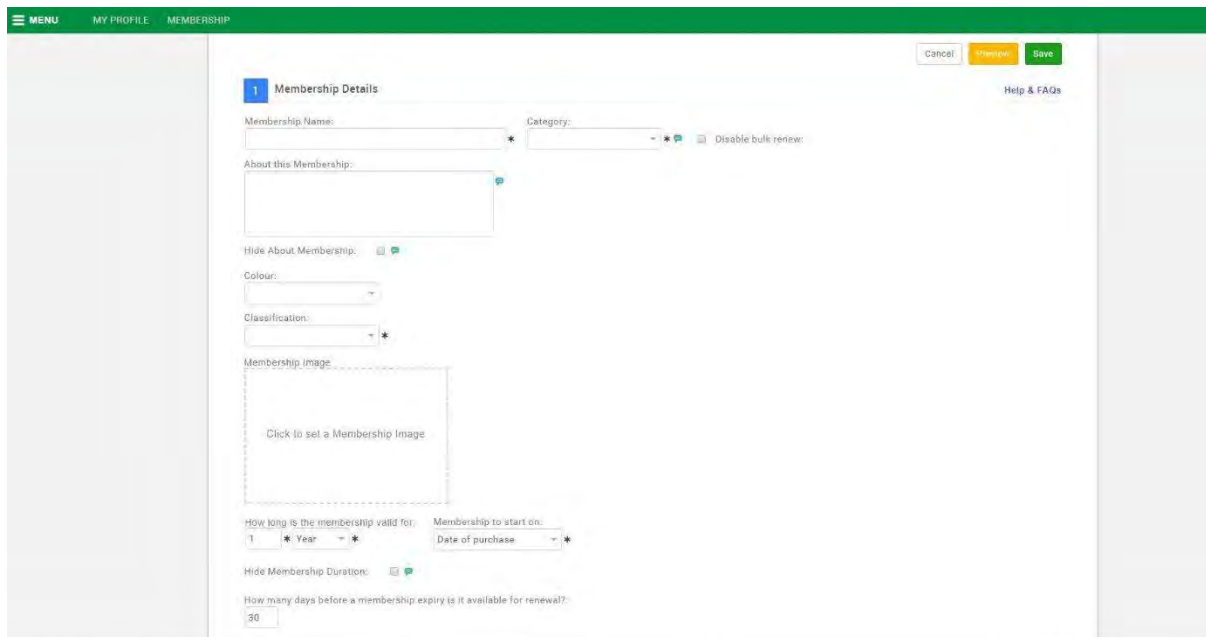
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Membership Pricing

This section is where you can control the price and payment settings of the membership.

- Price allows you to set the price of the membership.
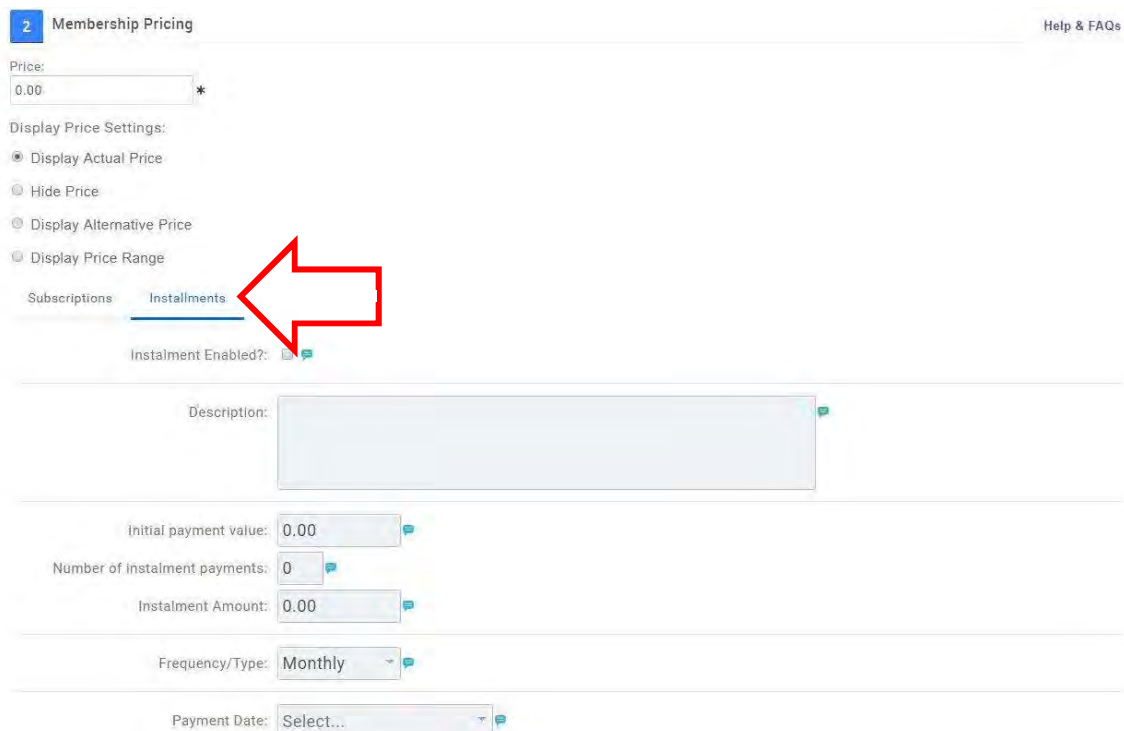- Automatically pro rata price is only available when the membership is configured to be started on a fixed date. This offers your members a discount based on the number of days the membership will be valid for, if purchased at a later date than the configured one. If you want to offer a fixed discount than using the discount rules will be a better option.
- Display Price Settings allows you to control if or what price you would like to show to the members.
- Subscriptions allows you to offer auto renewal options to your members.
    - Subscription Enabled allows you to turn this feature on for this Membership.
    - Description is presented to the member at the time of giving them the option to take out a reoccurring subscription.
    - Make this subscription mandatory allows you to automatically enrol your members into a subscription plan. If this is switched off then this option will be presented to the member but they would need to elect to sign up to the subscription plan.
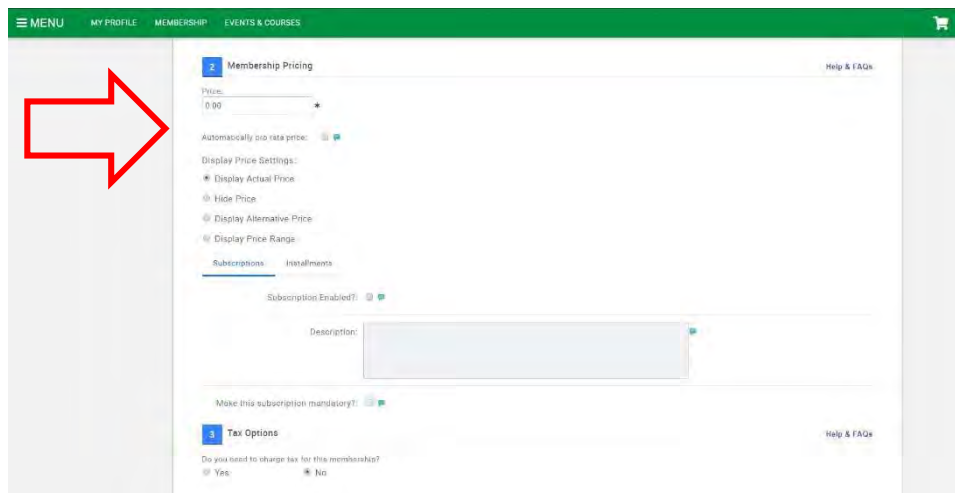
Note: If the membership is configured to be started on a fixed date, the Automatic Pro-Rata option will be available under this section.

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- Instalments allows you to offer payment plans to your members.
  - Instalment Enabled allows you to turn this feature on for this Membership. When switched on, payment by automatic instalments will be available to the member.
  - Description is presented to the member at the time of giving them the option to take out an instalment plan.
  - Initial payment value is the initial amount that is taken when the member selects the instalment option; this could be classed as the up-front charge.
  - Number of instalment payments determines the number of instalment payments that follows the initial payment.
  - Instalment Amount is the value of each instalment that will be charged to the member.
  - Frequency/Type determines the period that an instalment will be automatically charged.
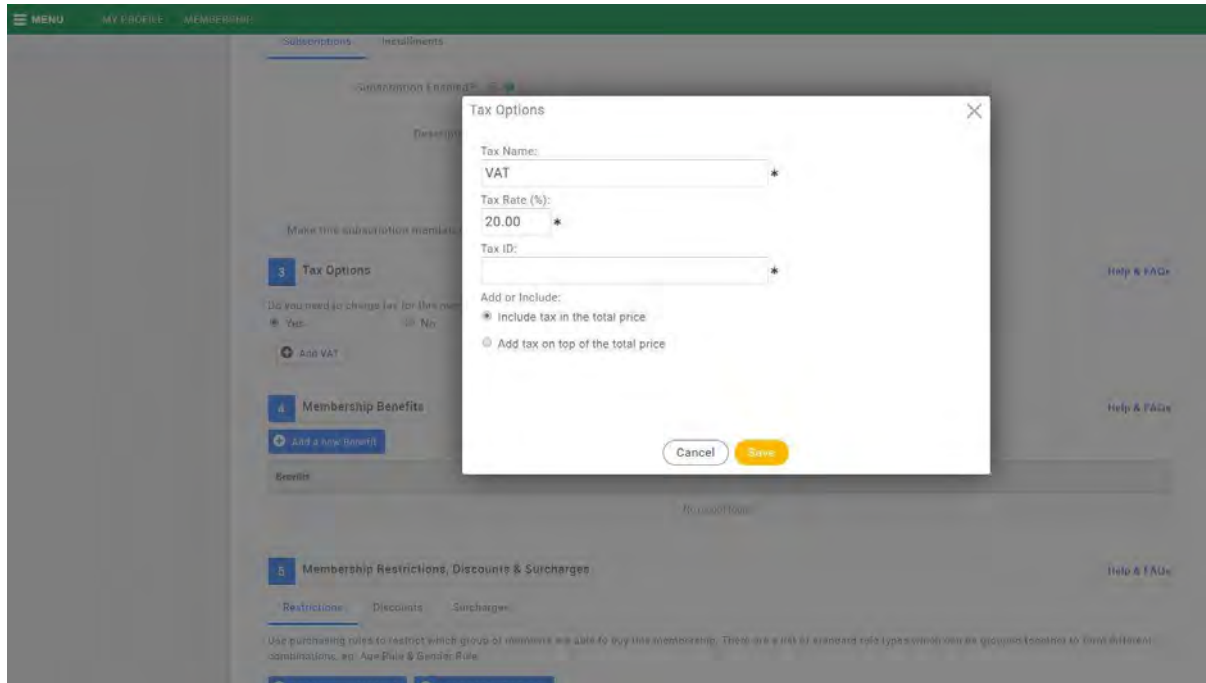 - Payment Date is the period that this instalment will be taken.

Note: Discount rules set on a membership will be disabled if instalments are enabled. They cannot work with each other.

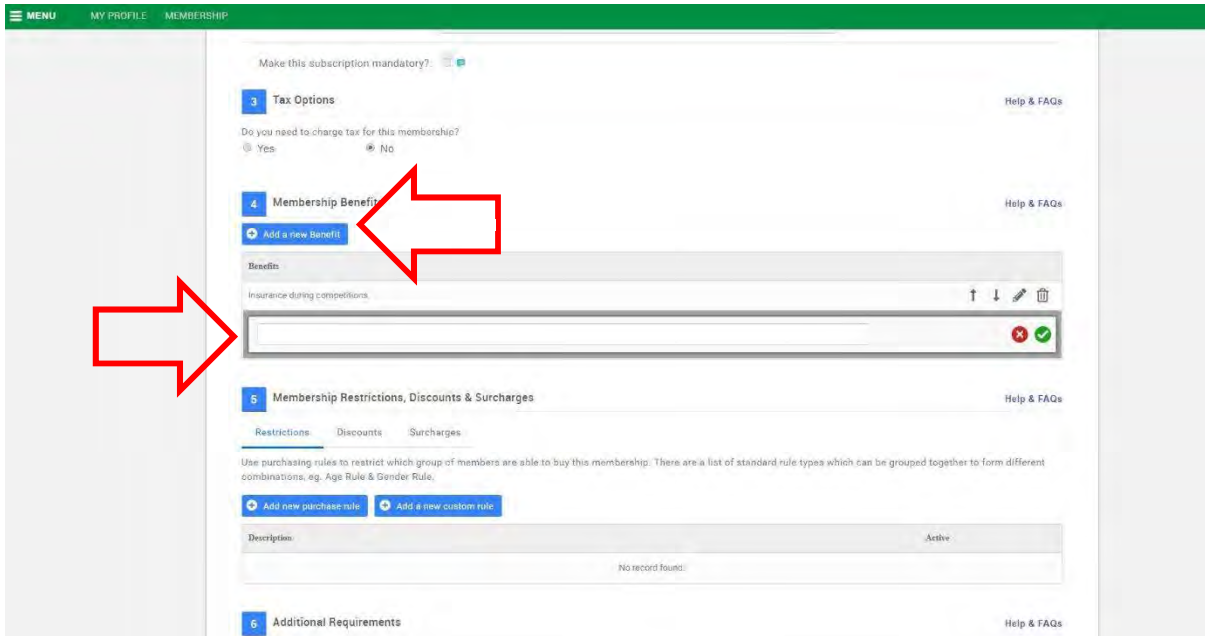v2018.01.2.UK

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Tax Options

This section allows you to charge taxes to your members. A pop up window will appear when it is enabled.
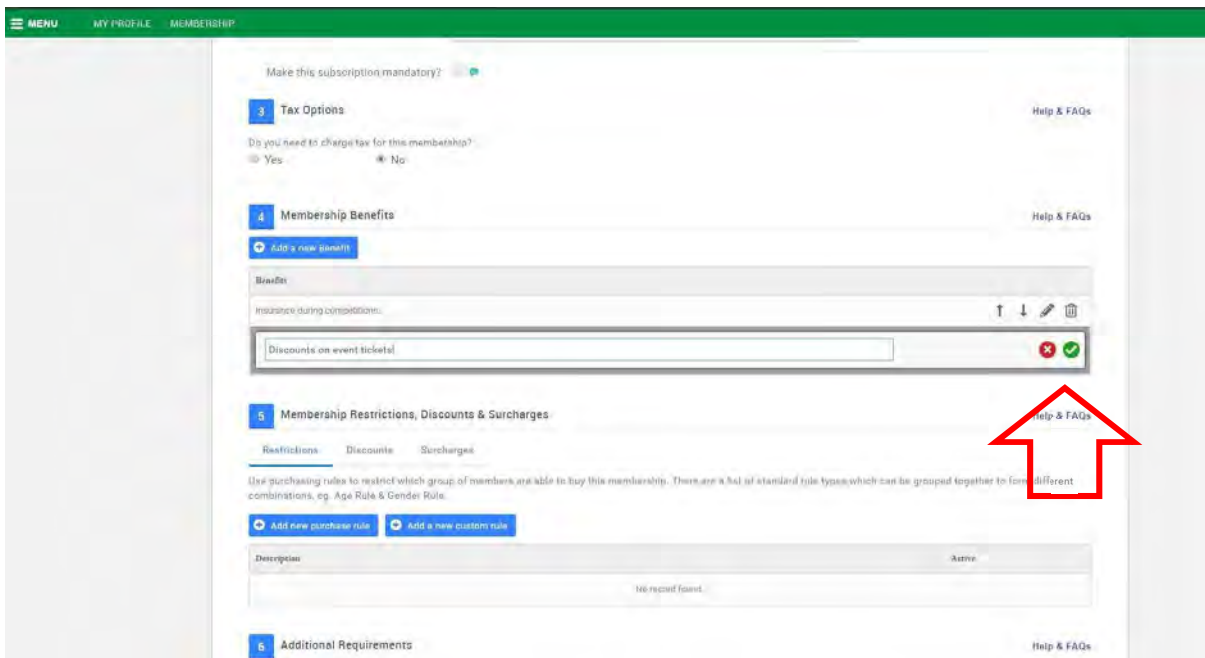

- Tax Name is what the tax is shown as on the receipt.
- Tax Rate allows you to define the rate charged.
- Tax ID is an internal reference and used for reporting purposes. It is not visible to members.
- Add or Include allows you to select if the taxes are shown as inclusive to the membership price or added to the price.

Benefits

This section allows you to add the benefits of the Membership and are displayed to the member before purchase. You can add benefits using the Add a new Benefit button and a field will appear at the bottom of the list.

After entering the required text, click on the green tick to save changes or the red cross to discard changes.

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You can use the controls next to each benefit to reorder, edit and delete them.

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Membership Restrictions, Discounts & Surcharges

This section allows you to set purchase rules for this membership and is divided into 3 parts.

■ Restriction rules are used to specify the group of members that are able to purchase this membership. There are a list of standard rule types which can be grouped together to form different combinations, for example Age Rule & Gender Rule.

   To add a rule click on the Add new purchase rule button and a rule box will appear.
   - Purchase Rule Description is an internal reference to the rule.
   - From is the date the rule will be valid from.
   - To is the date the rule will be valid till.
   - Click on the Add New Rule button to add a standard rule. Please see the Standard Rule FAQs for assistance.
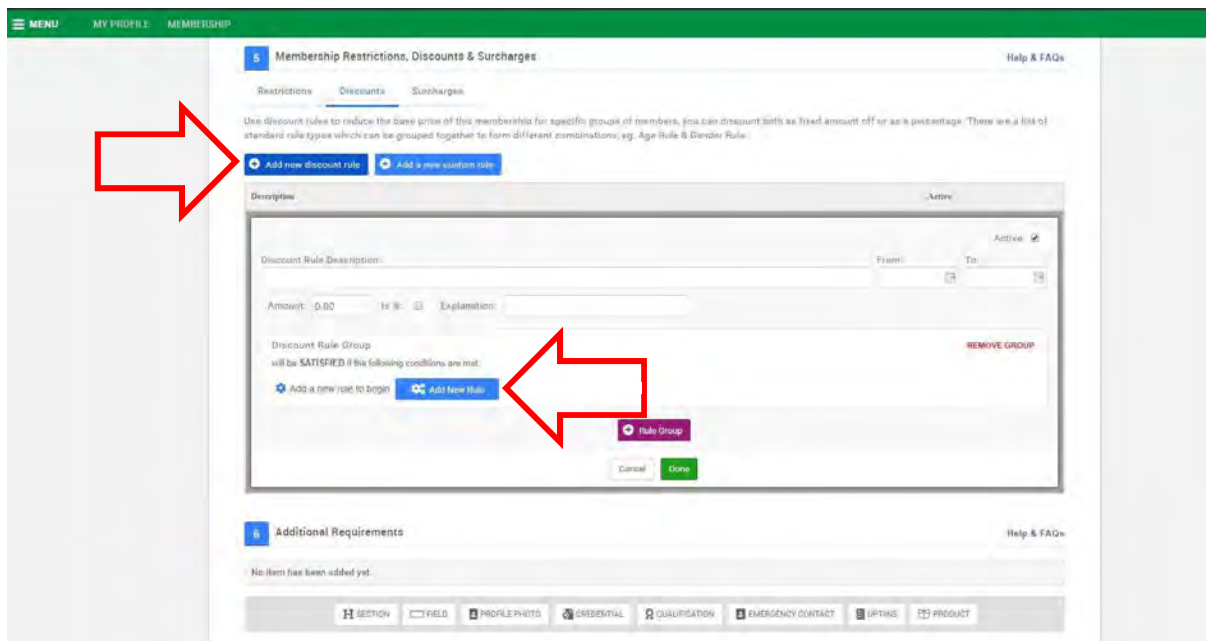
- Discount rules are used to reduce the base price of the membership for specific groups of members. There are a list of standard rule types which can be grouped together to form different combinations, for example Age Rule & Gender Rule.

  To add a rule click on the Add new discount rule button and a rule box will appear.
    - Discount Rule Description is an internal reference to the rule.
    - From is the date the rule will be valid from.
    - To is the date the rule will be valid till.
    - Amount is the value of the discount which can be turned into a percentage using the Is % tick box.
    - Explanation is an internal reference to the discount value.
    - Click on the Add New Rule button to add a standard rule. Please see the Standard Rule FAQs for assistance.


- Surcharge rules are used to increase the base price of this membership for specific groups of members. There are a list of standard rule types which can be grouped together to form different combinations, for example Age Rule & Gender Rule.

 To add a rule click on the Add new surcharge rule button and a rule box will appear.
    - Surcharge Rule Description is an internal reference to the rule.
    - From is the date the rule will be valid from.
    - To is the date the rule will be valid till.
    - Amount is the value of the surcharge which can be turned into a percentage using the Is % tick box.
    - Explanation is an internal reference to the discount value.
    - Click on the Add New Rule button to add a standard rule. Please see the Standard Rule FAQs for assistance.

Additional Requirements

This section allows you to a create membership specific form for your members. You can include credentials, qualifications, emergency contacts etc. Please see the Field Management FAQS for more information.
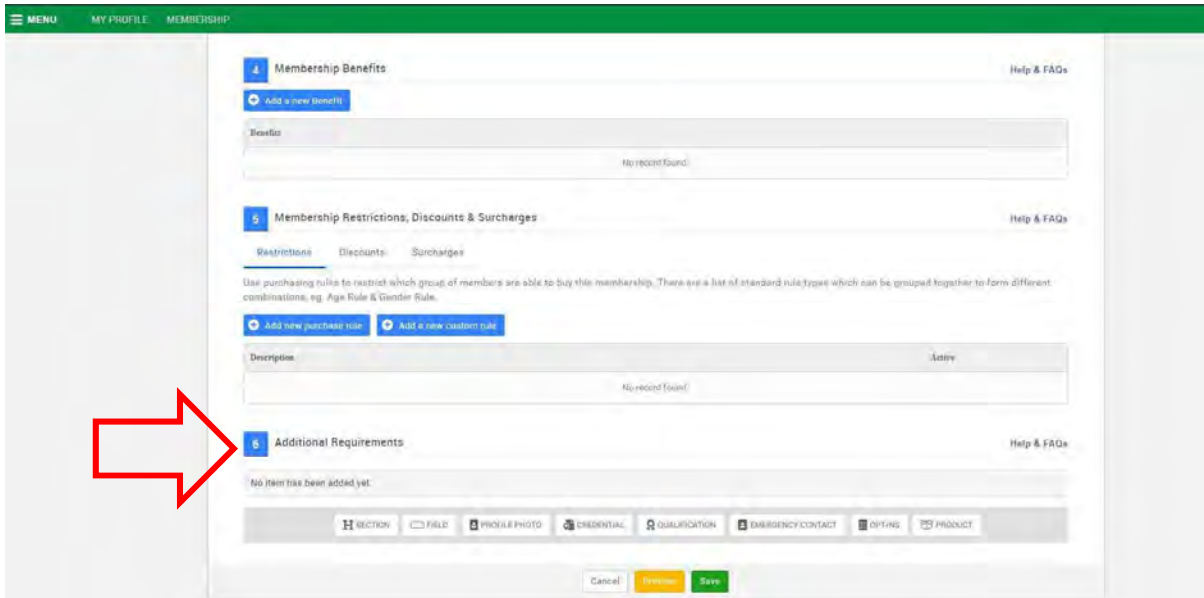
You can preview how the membership would be presented to the member using the Preview button.
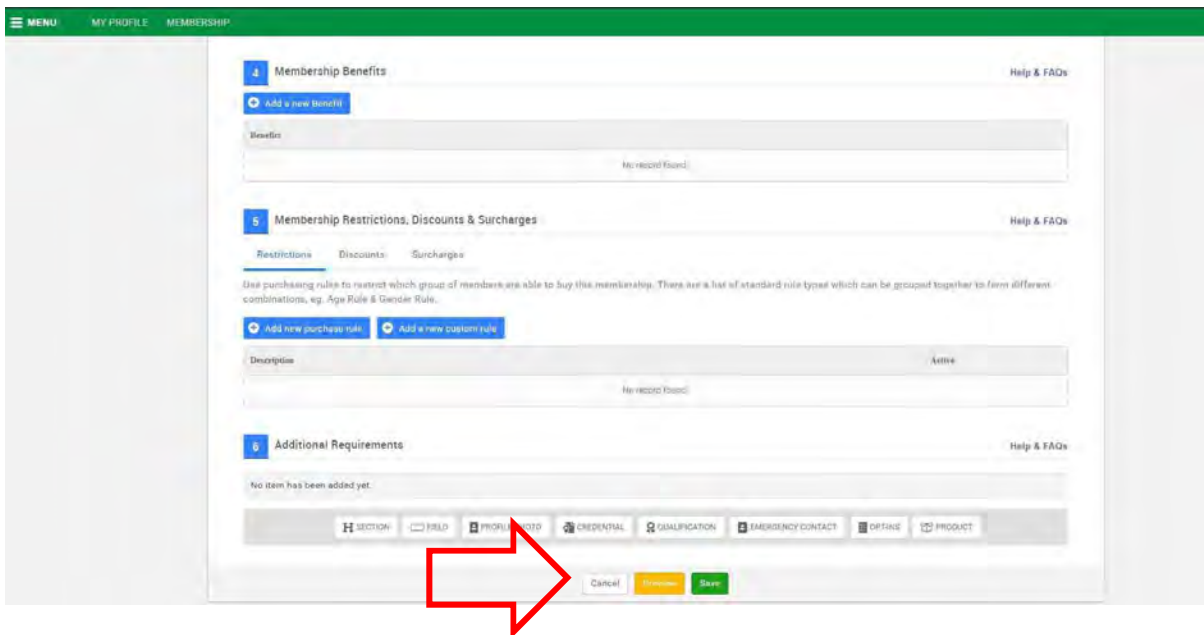
Click on the Save button to save changes.

Can I edit a Membership?

Yes you can by clicking on the Edit button next to the membership you want to edit.

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Can I change the sequence of Memberships?

Yes, there are sequence buttons (up and down) that you can use to change the position of the memberships when displayed to the member.

The sequence is only appropriate within the Categories, there is no need to group together Member, Club Member, etc.

Can I deactivate a Membership?

Yes, it is possible to deactivate a membership without deleting it. This however will not affect purchased memberships (Licences). To deactivate a membership, click on the Settings button and click on Inactive.


Can I delete a Membership?

Yes, it is possible to delete a membership using the Settings button next to the membership. However it is STRONGLY Recommended to deactivate a membership as opposed to deleting it as all auditability of that membership might be lost permanently.

Can I create Family Membership packages?

Yes, it is possible to create Family Membership packages. To do so, click on the Configure family membership button.
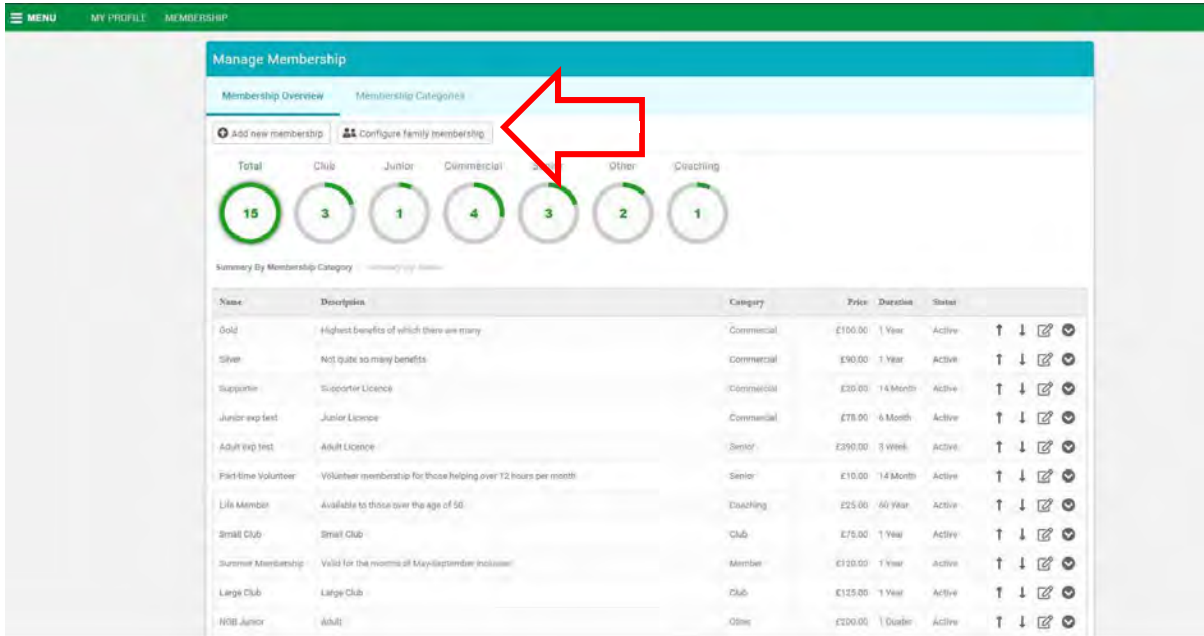
You will be redirected to the family configuration screen. It is divided into 4 sections.
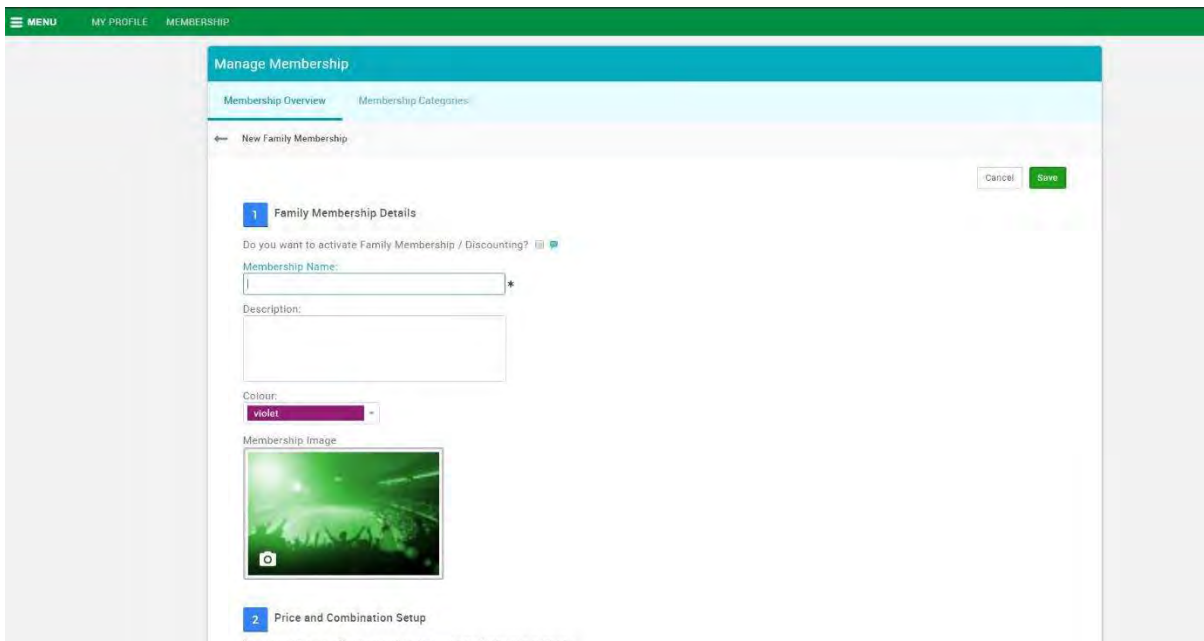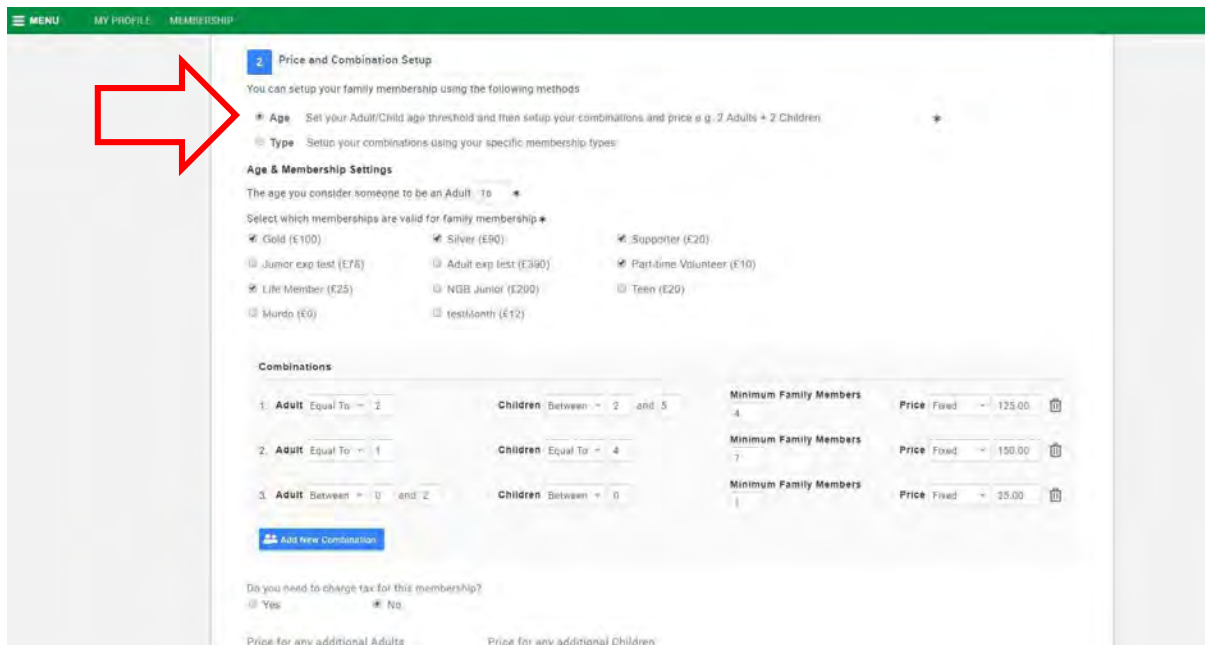
Family Membership Details

This is the section where you can add the basic details of the membership.

- Do you want to activate Family Membership / Discounting allows you to switch on this feature.
- Membership Name is the name that is presented to the member.
- Description will appear to the member via the More Info section. When a member selects the membership, it will also display in an opening paragraph. This should explain to the member more information about this membership.
- Colour is a drop down list of the available system colours that is presented to the member when they are browsing memberships.
- Membership Image allows you to set/update the image displayed on the membership.

Price and Combination Setup

This section is where you can control how the family membership should be priced. It is possible to create multiple combinations under both methods.
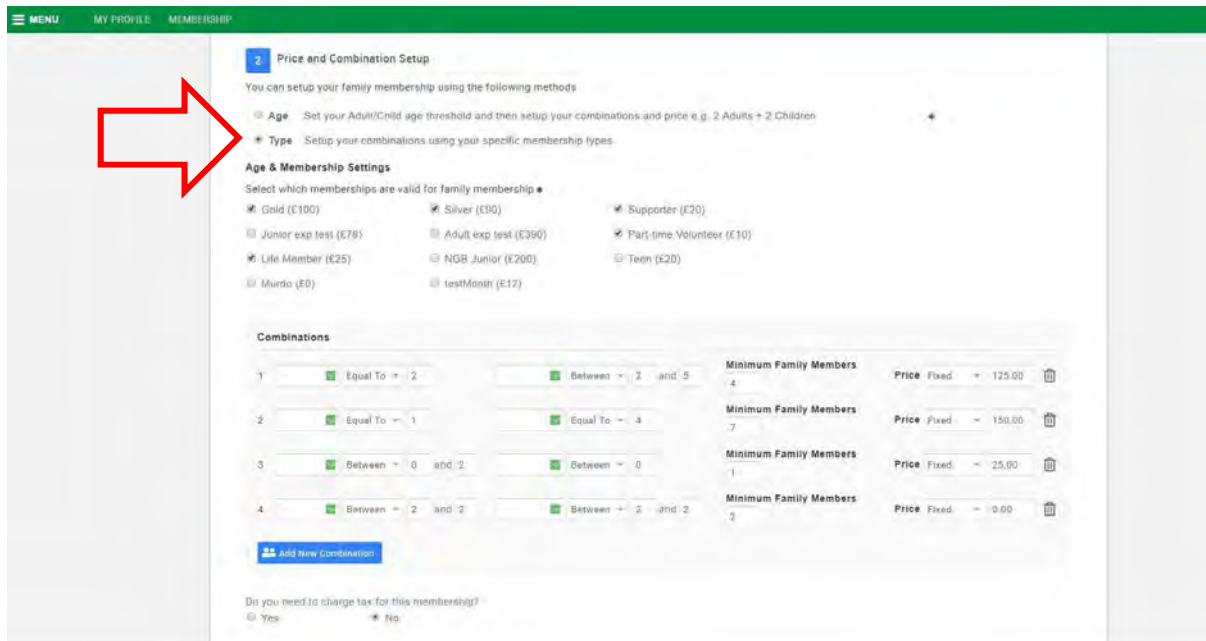

- Under the Age method, you are able to set up the membership based on the age the membership should consider a member an adult.
  - Enter the age you the member should be considered an adult.
  - Select the memberships you would want to include in the Family Memberships.
  - With the Add New Combination button create a combination.
  - You are able to specify a fixed number or range of adults and children needed in order to qualify for the discount.
  - Enter the minimum number of family members needed in order to qualify for the discount.
  - Enter the discount value and select if it should be calculated as a fixed amount or as a percentage.

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- Under the Type method, you can set up the family membership based on the type of membership offered in the package. Choose this method if you want to offer discounts if multiple memberships are bought together.
    - Select the memberships you would want to include in the Family Memberships.
    - With the Add New Combination button create a combination.
    - Select a combination of two memberships and a fixed or range of number of those memberships that should be taken out in order to qualify for the discount.
    - Enter the minimum number of family members needed in order to qualify for the discount.
    - Enter the discount value and select if it should be calculated as a fixed amount or as a percentage.

- Do you need to charge tax for this membership allows you to charge taxes. Please refer to page 13

- Display Price Settings allows you to control if or what price you would like to show to the members.

Benefits

This section allows you to add the benefits of the Membership and are displayed to the member before purchase. You can add benefits using the Add a new Benefit button and a field will appear at the bottom of the list.

After entering the required text, click on the green tick to save changes or the red cross to discard changes.
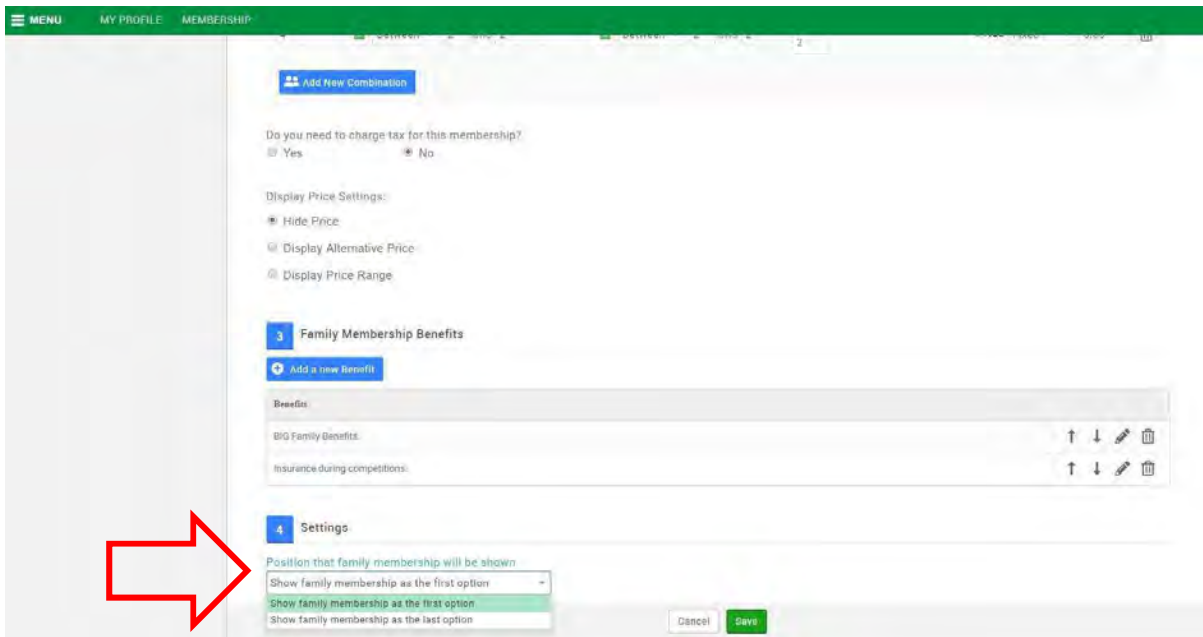
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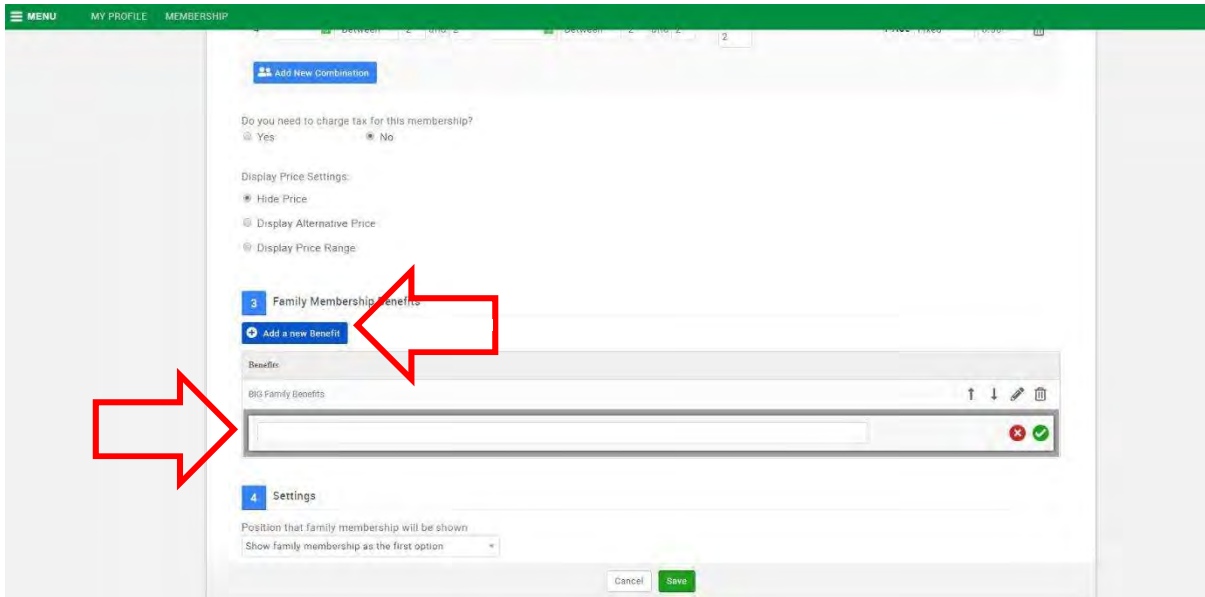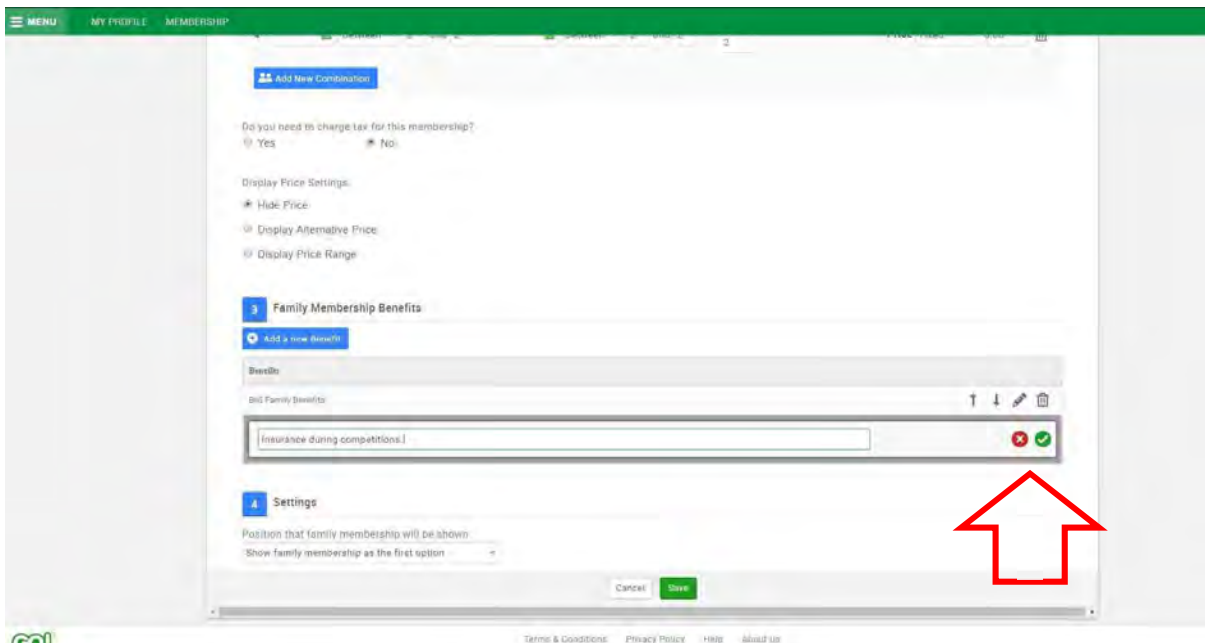
You can use the controls next to each benefit to reorder, edit and delete them.
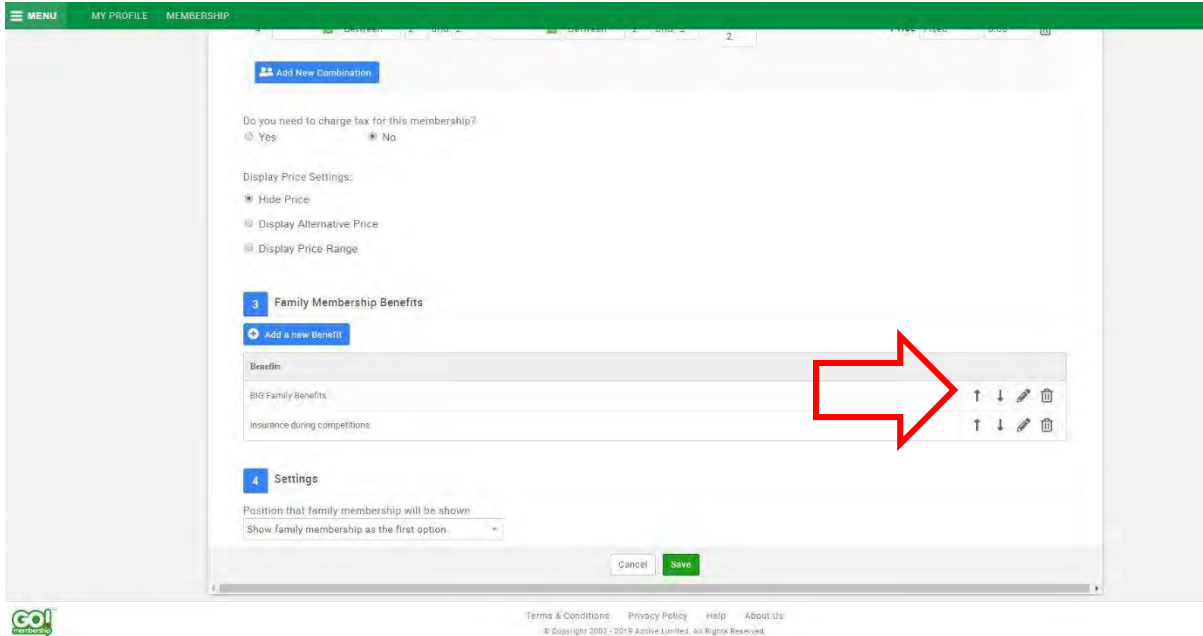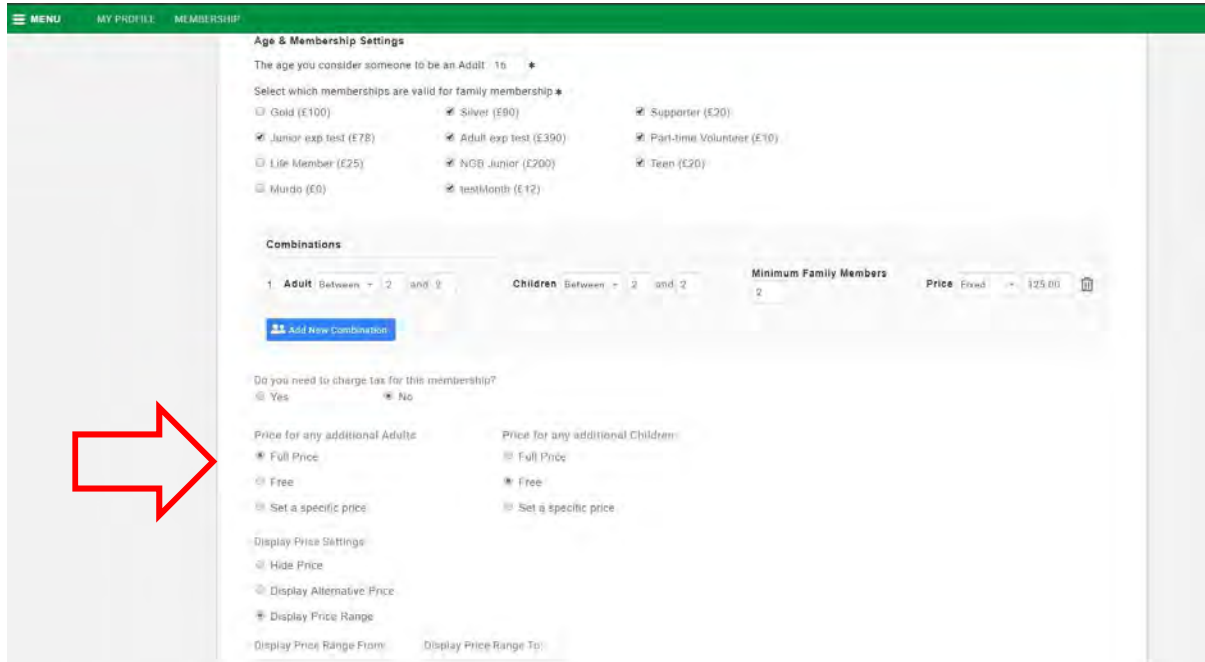

Settings

This section allows you to select if the Family Membership package would be presented to your members as the first or last membership option.

Save the changes using the green Save button after your configuration has been completed.

Can I configure prices for additional members?

Yes, it is possible to configure prices for each additional adult or child but only under the Age method. There are three options to choose from.

Can I edit Family Membership packages?

Yes, it is possible to edit the Family Membership packages however it will only affect future purchases.

Can I combine Family Membership packages with individual membership discounts?

No, Family Membership package discount will be dictated by the configuration based on the Family Membership settings.

Which combination will the system present?

GoMembership will always present the cheapest option available to the members.

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