

Membership Management FAQs

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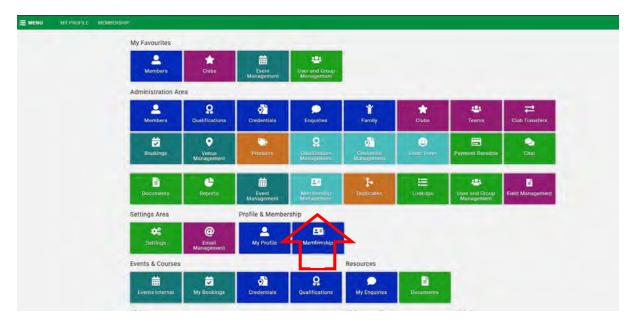


What is Membership Management?

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.







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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.

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- 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.



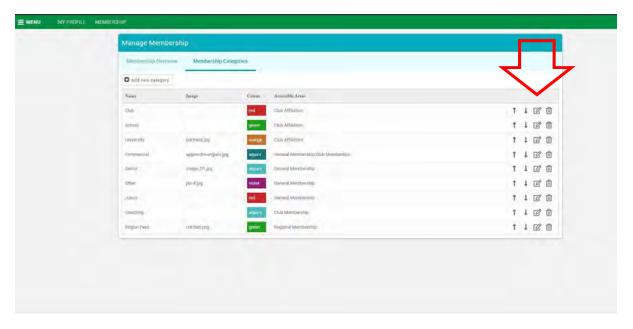
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Can I edit a Category?

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.





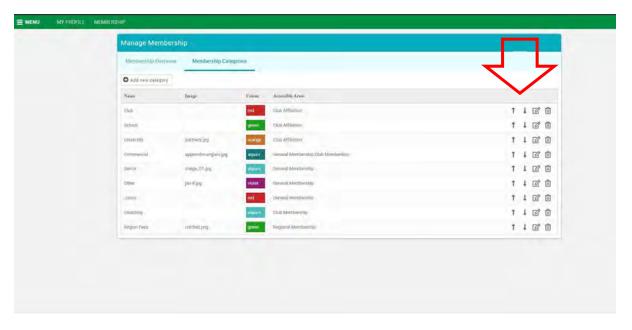
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Can I change the sequence of Categories?

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.





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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.

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To delete a category click on the delete icon at the end of the row.





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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.

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You will then be directed to a new window.

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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.

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	3 Tax Options	Help & FAQs	
	Do you mand to charge tax for this membrashin? ☺ Yee: ❀ No		

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.

2 Membership Pricing		Help & FAQs
Price:		
Display Price Settings:		
Display Actual Price		
O Hide Price		
Display Alternative Price		
Display Price Range		
Subscriptions Installments		
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Description:	p	
Initial payment value:		
Number of instalment payments:		
Instalment Amount:	0.00	
Frequency/Type:	Monthly ~ 🗭	
Payment Date:	Select 🔫 P	

- 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.







Tax Options

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

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- 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.

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

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			6 Additional Requirements	Help & FAQs





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

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6 Additional Requirements	Help & FAQs
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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. .
- Ξ. 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.

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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.

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			H SECTION TO RELO E PROFILE PHOTO CREDENTIAL & QUAN	PÓATION 🖪 EMERGENCY CONTACT 📓 LIPTINS 🔁 PRODUCT

 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.



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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.

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You can preview how the membership would be presented to the member using the Preview button.

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6 Additional Requirements	Help & FAQs
No item has been added yet.	
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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.

Manage Memb	ership							
Membership Overv	www Membership Categories							
O Add new member	O Add new membership 44 Configure family membership							
Total	Total Club Juntor Commercial Sentity Other Eduching							
15 Summary Dy Members					7	\Box		
Name	Description	Category	Price Dur	ition Status		\checkmark		
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Shet	Not gute so many broefits	Dommercial	£90.00 1 W	ar Active	Ť	100		
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Aduit exp test Part-lime Volunteer Life Member	Wainteel membersho for those helping over 12 hours per month. Available to those over the age of 50	Senior Chaching	E10.00 141	Active an Active at Active	1 1 1	160		
Aduit exp junt Part-lime Volunteer Life Member Senal Dub	Velocities memorystra for those helping over 12 hours per month. Available is those over the ego of 50 gmap Club	Senior Cructing Diab	E10.00 141 625.00 10 E75.00 1 11	North Active Aun Active at Active At Active	1 1 1	1 2 0 1 2 0 1 2 0		



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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.

Manage Memb	ership						
Membership Overv	Membership Overview Membership Categories						
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Stee	Not quite so many benefits	Commercial	£90.00 1 V	ear Ac	ove 1	1 1	30
	Support Ucence		dantasi un	and and	ne 1		30
Supporter	supportion protocol	Committela	E20.00 14	Merica Me	100	1 1 3	
Supportien	Jusiar Lipsson	Commerces	£20.00 14				
				looth Ac	tive 1		20
Junior expitent	Juster Liowow	Communical	£78.00 61	torith Ac	tver 1 zve. 1		20
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Junitr explant Adult explant Pictitime Volunteer	Junier Liensee Adult Liensee Volkiher mentenstrije for these helping over 12 hours per mentet	Communical Senior Senior	£78.00 61 £390.00 34 £10.00 14	teeth Ac teek Ac Month Ac Year Ac	tver 1 over 1 been 1		
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ukusbrevop fæst Adult sop fæst Part time Volunteer Lifa Membies Brinal Cityp	Junier License Adult License Völarher memberstip för (haar helping over 12 haars per mentli Avallable to trisse over the ege of 50 Breat Club	Communical James Samer Datching Chilo	£78.00 61 £390.00 34 £10.00 14 £25.00 60 £76.00 14	tenth Ac Month Ac War Ac Mu Ac	tive 1 ben 1 ben 1 ben 1 ben 1 ben 1		

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



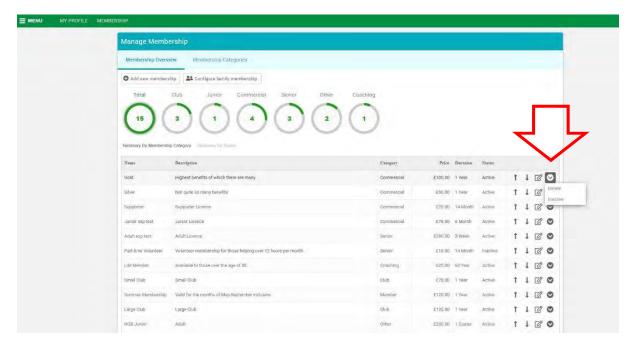


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Can I deactivate a Membership?

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.

Manage Memb	ership							
Membership Overv	w Membership Calegories							
Add new members	Club Junior Commercial Senior Other	Cosching						
Summory By Membersh	p Category Summers by Amore Description	Category	Price	Ducation	Status			
Gold	Highest benefits of which there are many	Commercial	£100.00	1 Year	Active	Ť	1	8
Silver	Not quite so many benefits	Commercial	£90.00	1 Year	Active	Ť	ł	8
Supporter	Supporter Licence	Commercial	£20.00	14 Month	Active	î	1	2
Junior exp test	Junior Licence	Commercial	£78.00	6 Month	Active	Ť	Ļ	8
Adult exp test	Adult Licence	Senior	00.0663	3 Week	Active	î	1	2 6
Part-time Volunteer	Valunteer membership for those helping over 12 houts per month.	Senior	£10.00	14 Month	Inactive	î	ţ	8
Life Member	Available to those over the age of 50.	Coscherg	£25.00	60 Year	Active	T	1	3
	Small Club	Chib	£75.00	1 Year	Active	Ť	1	3
Small Club			£120.00	1 Year	Active	Ť	1	81
Small Club Summer Membership	Valid for the months of May-September inclusive	Member						01
	Valid for the months of May-September inclusive Large Club	Member Club	E125.00	1 Year	Active	Ť	1	-





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.

Manage Memb	ership							
Membership Overview Membership Categories								
Add new membership At Configure family membership Total Chub Junior Clemmerclal And Other Clearling								
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Summery By Montherste	6 Category							
Name	Desertquien.	Caugary	Price	Duration	Shiter			
Gold	Highest benefits of which there are many	Commencial	£100.00	1. Venc	Active	Ť	1.1	20
She	Not quite so many benefits	Commercial	£90,00	1 Vear	Active	Ť	11	20
Supporter	Support Voence	Commelcial	E20.00	14 Month	Active	t	4 1	20
Junior exp test	Junier Lionope	Commandial	£78.00	ó Morith	Active	Ť	11	20
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Junity explant			£390.00			t	11	
uhanibr anp fant Adult king test	Adult Licence	Senior	£390.00	3 week	ACTIVE.	t t	11	20
ulunion exp feet Adult exp test Psiciliare Volunteer	Advit Licence Volueher membrasis for those heiging over 12 hours per month	Senior	£390.00 £10.00	3 week 14 Month 60 Year	Active	† † †	41	1 0 1 0
ulunion exp feet Adult exp test Painklime Volunteen Life Member	Advit Lipence Websiteer meetilemblip for those helping over 12 hours per mostli Available to those over the age of 50	Sentor Sentor Dauchling	£390.00 £10.00 £25.00	3 week 14 Month 60 Year 7 Yeau	Active Active Active	† † † †		
uhunibr exp fest Adult exp fest Paint lime Volunteer Uils Mambas Brnait Glub	Advit Lippinge Wolaither membership for those helping over 12 hours per month divisible to divise over the age of 50 Small Club	Senter Senter Daabling Club	£390.00 £10.00 £25.00 £75.00	3 week 14 Month 60 Year 1 Year 1 Year	Active Active Active Active	† † † † †		

You will be redirected to the family configuration screen. It is divided into 4 sections.

MENU MY PROFILE	MEMBERSHIP	
	Manage Membership	
	Membership Overview Membership Categories	
	- New Family Membership	
		Cancel Save
	Family Membership Details	
	Do you want to activate Family Membership / Discounting? 🔝 🗭 Membership Name:	
	*	
	Description:	
	Celour: Volet -	
	Membership Image	
	A LINE AND	
	0	
	2 Price and Combination Setup	
	You can setup your family membership using the following methods	





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.

NU	MY PROFILE	MEMBERSHIP	£						
			2 Price and Combination Setu	ip.					
	_		You can setup your family members	hip using the following methods					
			Age Set your Adult/Child age	threshold and then setup your	combinations and mice e	a. 7 Adults + 2 Children			
		_ /	Type Setup your combination						
			Age & Membership Settings	cond the space strange and					
			The age you consider someone to b	e an Adult To					
			Select which memberships are valid						
			Cold (E100)	Silver (£90)	Supporter (£20	1)			
			G Jumor exp test (E75)	Adult exp lest (E390)	Part-time Volur	nteer (E10)			
			E Life Member (£25)	G NGE Junior (E200)	Teen (E20)				
			() Mardo (£0)	🖾 (estMonth (É12)					
			Combinations	Children Betwee	m = 2 and 5	Minimum Family Members	Price Fored	- 125.00	۵
			2. Adult Equal To - 1	Children Equal 1	For - 4	Minimum Family Members	Price Food	- 150.00	Ó
			3. Adult Between = 0 and	Z Children Betwee	m'+ 0	Minimum Family Members	Price Fixed	* 25.00	Ô
			at Add New Combination						
			with a start of a start of a start of	ambarahin?					
			Do you need to obarge tax for this m I Yes I No.						

- 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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MY PROFILE	MEMBERSHIP						
		2 Price and Combination Se	tup				
	N	You can setup your family membe	ship using the following met	thods			
_		Age Set your Adult/Child a	e threshold and then setup	your combinations and price e.g.	2 Adults + 2 Children		
		• Type Setup your combinatio	ns using your specific memb	tership types			
	-/	Age & Membership Settings					
	V	Select which memberships are val	d for family membership *				
		R Gold (0100)	🖈 Silver (E90)	M Supporter (E20)			
		III Junior exp test (£78)	Adult exp test (£390)	Part-time Volunte	eer (E10)		
		🖻 Life Member (£25)	C NGB Junior (£200)	Tegn (£20)			
		III Murtia (ED)	testMonth (E17)				
		Combinations					
		1 📓 Equal To 🐲	2	Between = 2 and 5	Minimum Family Members 4	Price Fixed + 175.00	۵
		2 🖉 Equal To -	r	Equal To - 4	Minimum Family Members	Price Fixed ~ 150.00	
		3 Between -	0 and 2	Between * 0	Minimum Family Members	Price Fixed ~ 25,00	
		4 🗮 Between =	2 and 2	Between + 2 and 2	Minimum Family Members	Price Fixed - 0.00	1

- 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.





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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.

IENU	MY PROFILE	MEMBERSHIP		2 detwedn 2 one 2 2	0.000 III
			Add New Combination		
			Do you need to charge tax for this membership?		
			Yes No		
			Display Price Settings:		
			Hide Price		
			Display Alternative Price		
			Display Price Range		
			3 Family Membership renefits		
			Add a new Benefit		
			Benefits		
	_		BIG Family Benefits		t I 🖉 🗇
					8 9
			J		
			4 Settings		
			Position that family membership will be shown Show family membership as the first option *		
			Stow remain memory as the met option	17 ml	
				Cancel Save	

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

NU MY PROFILE	MEMBERISHIP				
		A Blocker Field	a select to be a	2	102 / 102 J.CO III
		add New Combination			
		Do you need to charge tax for this membership?			
		Display Price Settings			
		* Hide Price			
		O Display Alternative Price			
		10 Display Price Range			
		Family Membership Benefits			
		Add a new New Ye			
		Descille			
		Bog Farring Donality			t 4 🖉 🗇
		finaurance during competitions.]		1	00
		and the second s			
		A Settings			
		Position that family membership will be abown			
		Show family membership as the first uption =			
			Cancel Shire		





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

Do you need to charge tax for this membership? Ø Yes * No Display Price Settings: * Hide Price				
Do you need to charge tax for this membership? © Yes Display Price Settings: # Hide Price				
Do you need to charge tax for this membership? © Yes Display Price Settings: # Hide Price				
© Yes No Display Price Settings: Hide Price				
© Yes No Display Price Settings: Hide Price				
Display Price Settings: Hide Price				
Hide Price				
Hide Price				
Display Alternative Price				
Display Price Range				
Family Membership Benefits				
🕙 Add a new Benefit				
Benefits				
BIG Family Benefits			t i 🖉 🔟	
Insurance during competitions			t 1 / 🗇	
		•		
4 Settings				
Position that family membership will be shown				
Show family membership as the first option *				
	Cancel Save			
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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.

MY PROFILE	MEMBERSHIP	And a state of the	and the second				
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		And New Combination					
		Do you need to charge tax for this membership?					
		Display Price Sattings:					
		Hide Price					
		Ø Display Alternative Price					
		Ø Display Price Range					
		3 Family Membership Benefits Add is new Reputit					
		Bemefitt					
		BIG Family Benefits			t	1 /	Ô
		Insurance during-competitions			t	1 1	面
	Л	4 Settings					
		Position that family membership will be shown					
	_ /	Show family membership as the first option -					
	V	Show family membership as the first option Show family membership as the last option	Dancel Dave				
		state to the second state and the second second	Gancer				

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.

MY PROFILE	MEMBERSHIP								
		Age & Membership Settings							
		The age you consider someone to	be an Adult 1	6 *					
		Select which memberships are va	lid for family m	embership *					
		Gold (£100)		690)	Supporter (£20)				
		@ Junior expitest (£78)	Adult e:	ep test (£390)	R Parl-time Volunte	ner (E10)			
		Life Member (£25)	🗃 NGB Ju	mior (£200)	2 Teen (£20)				
		G Murdo (E0)	2 testidor	nth (6.12)					
		Combinations							
						Minimum Family Members			
		1 Adult Between + 2 an	9.2	Children Between	2 and 2	2	Price Frond	- 125.00	Ē
		22 Add New Combination							
		Do you need to charge tax for this	membership?						
		Yes * No							
		Price for any additional Adults		Price for any addition	al Children				
		* Full Price		E Full Price					
		O Free		* Free					
		Set a specific price		Set a specific price					
		- on a specific bires		an vici il sherine birce					
		Display Price Settings							
		I Hide Price							
		Display Alternative Price							
		Display Price Range							
		Display Price Range From	Display Price R	ange To:					
			1.1.1						

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.

