

# Membership Miniseries: Episode 2-Utilizing Recurring Membership Programs



May 22<sup>nd</sup>, 2013



# What are recurring membership programs?

- Recurring (or sustaining) programs are for memberships with no expiration date as long as a set amount is paid on a recurring basis.
- These memberships are dues-based only, not contributions based.
- These are most often used when membership dues need to be paid in installments.
- This type of membership is not available online.
- There are no renewal notices for this membership program

# How to set up a recurring membership program

1. From Memberships, click Add
2. Enter the general information about the program, such as name and description
3. On the General tab, select Recurring/Sustaining
4. Click Next
5. On the Payment Options/Levels tab, select the payment options for this membership, like Monthly, Annually, Quarterly or select all
6. Enter the names of each level in this program, number of members, number of cards, & number of children
7. On the Prices tab, define the prices for each payment option
8. On the Benefits tab, select the card format & name formats for cards. Enter any benefits that are offered for this program
9. On the Dues tab, select if the portion of the dues is tax deductible. Select if any membership promotions apply
10. Review all information and save the changes

For more information, see this [article](#)

# Adding Recurring Memberships

- Once the recurring program has been setup, you can now accept payment and add memberships to records.
- From the constituent record, Memberships tab, click Add
  - In the 'What are they paying for' section, select the program in the drop down and the level.
  - Select the payment option
  - If you are entering a payment at the same time, select mark first payment. If you need to create a recurring gift schedule (or installment schedule), select create recurring gift.
  - Finish filling out the form and save the changes.

# Make first payment option

- When adding a recurring/sustaining membership, you have the option to make the first payment. This allows you to make the first payment and add the membership all in one step.
- You will need to fill out the 'How are they paying' section on this form

# Create recurring gift option

- When adding a recurring/sustaining membership, you have the option to make the create recurring gift. This allows you to add the membership to the record and accept payment later.
- This actually creates a recurring gift record in the system.
- On this recurring gift, you can set up automatic payment information. For example, if they want to pay automatically every year, quarter, month, etc.
- You can also still make a payment directly on the record and it will apply to the outstanding amount due.

## Create recurring gift option (cont.)

- The benefit of this option is that you can allow Members to pay for memberships in installments
- If you've set up the recurring gift to be paid automatically via credit card or direct debit you can run generate payments. This process will generate any payments due from recurring gifts and put them into a batch for you to commit to the system.

# Generating Automatic Payments

- There are two ways to generate the automatic payments. If you are generating both credit card payments as well as direct debit, use the generate payments feature.
- If you do not use direct debit and only generate credit card payments, use Credit Card Processing. This process will generate the payment and authorize it all in one step.



# Credit Card Processing

- From Financials, click Credit Card Processing
- Add a new process

The screenshot shows a software window titled "Add a credit card processing process". It has two tabs: "Charge process" (selected) and "Rejection handling".

Under the "Charge process" tab, there are three input fields: "Name:" with the value "Recurring Gifts", "Description:" (empty), and "Account:" with a dropdown menu showing "Blackbaud Merchant Services -12".

Below these is a green header bar with the text "Where are the credit card transactions coming from?".

There are two radio button options: "Existing batch" (unselected) and "New batch" (selected). The "Existing batch" option has a search icon and a checkbox labeled "Validate projected totals before processing transactions" which is checked.

The "New batch" option has three sub-options: "Include pledges" (unchecked), "Include recurring gifts" (checked), and "Only include payments in the following selection:" (unchecked). Below this is a "Selection:" field with a search icon.

There is a "Payments due on or before:" dropdown menu with the value "Date this process runs".

There is a checked checkbox labeled "Consolidate multiple commitments to a single payment by constituent".

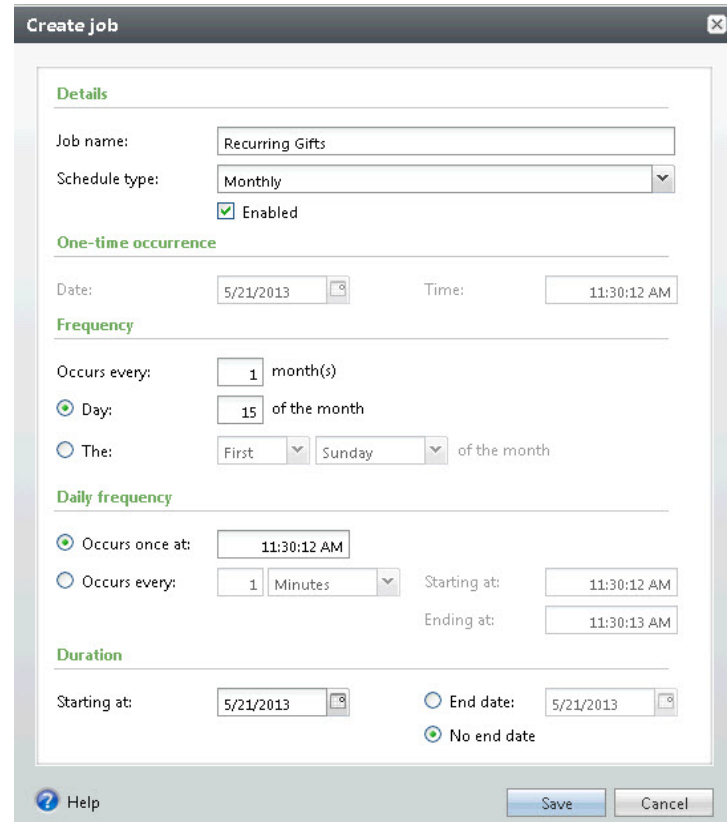
There is a "Payment batch template:" dropdown menu with the value "Enhanced Revenue Batch for Credit Card Payments".

There is a "Payment batch owner:" dropdown menu with the value "BBTrain13".

At the bottom left is a "Help" button with a question mark icon. At the bottom right are "Save" and "Cancel" buttons.

# Credit Card Processing (cont.)

- If you have a monthly recurring gift schedule, you can set up a job schedule to run credit card processing every month.
- Click the name of the process and go to the Job Schedules tab
- Add a new job schedule



The screenshot shows a 'Create job' dialog box with the following configuration:

- Details**
  - Job name: Recurring Gifts
  - Schedule type: Monthly
  - ☒ Enabled
- One-time occurrence**
  - Date: 5/21/2013
  - Time: 11:30:12 AM
- Frequency**
  - Occurs every: 1 month(s)
  - ☒ Day: 15 of the month
  - ☐ The: First Sunday of the month
- Daily frequency**
  - ☒ Occurs once at: 11:30:12 AM
  - ☐ Occurs every: 1 Minutes
  - Starting at: 11:30:12 AM
  - Ending at: 11:30:13 AM
- Duration**
  - Starting at: 5/21/2013
  - ☐ End date: 5/21/2013
  - ☒ No end date

Buttons: Help, Save, Cancel

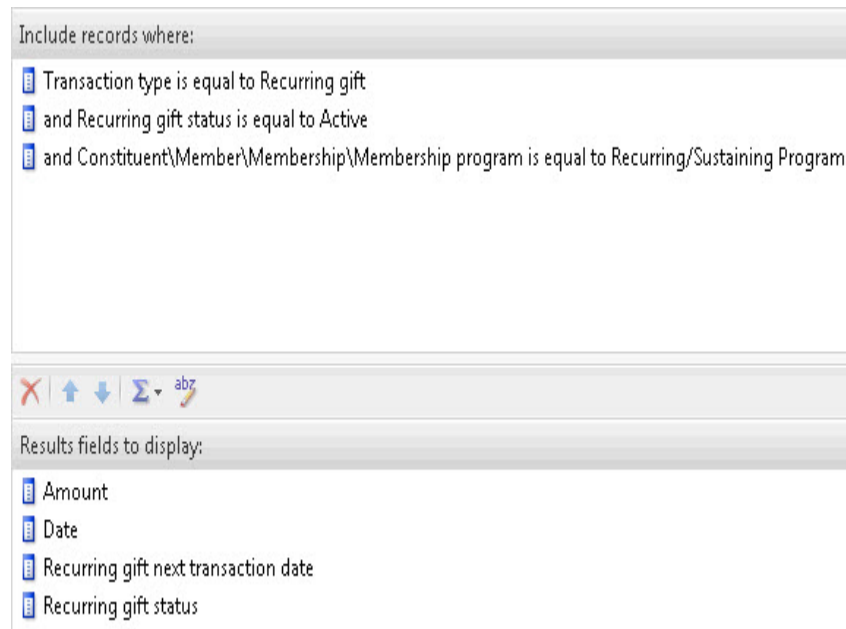
# Run Credit Card Processing

- This will generate a batch of all recurring gifts that were set up to be paid automatically by credit card.
- You will want to open this batch, verify authorization codes exist and commit to the system
- If you set up a job schedule, the system will only create the batch. It will not commit it. This step has to be done each month in order for next months gifts to be generated.

# Reminders & Acknowledgements

Reminders can be generated for these recurring gifts.  
To set up reminders, go to Marketing and Communications, click Reminders

## Revenue Query:



Include records where:

- ☐ Transaction type is equal to Recurring gift
- ☐ and Recurring gift status is equal to Active
- ☐ and Constituent\Member\Membership\Membership program is equal to Recurring/Sustaining Program

Results fields to display:

- ☐ Amount
- ☐ Date
- ☐ Recurring gift next transaction date
- ☐ Recurring gift status

# Reminders and Acknowledgements (cont.)

## Sample recurring gift reminder letter

Process date

Addressee

Address

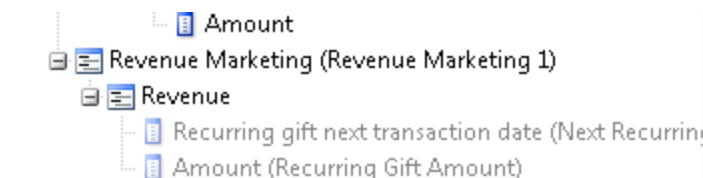
City, State Postal code

Dear Salutation,

Thank you for your continued support to our organization through membership. This letter is to remind you that we will be drafting the next payment on Next Recurring Installment date of Recurring Gift Amount. We appreciate your generosity!

Sincerely,

The Altru Co.



# Reminders and Acknowledgements (cont.)

If someone does not want a reminder, you can unmark the reminder checkbox on the recurring gift.

**Edit recurring gift**

Constituent: Walter Walker

Finder number:

Amount:

Appeal:

Designation:

Revenue function:

Date:

Inbound channel:

Effort:

Reference:

Revenue category:

☐ Recurring gift is anonymous

**Schedule**

Frequency:

Starting on:

Ending on:

Next transaction:

☒ Send reminders  
☐ Do not acknowledge

	Date	Amount	
	5/9/2013	\$70.00	▲
	5/9/2014	\$70.00	■
	5/9/2015	\$70.00	■
	5/9/2016	\$70.00	■
	5/9/2017	\$70.00	▼

# Reminders and Acknowledgements (cont.)

Anytime someone gives a gift, its best to send an acknowledgement letter and recurring memberships are no exception.

Whether you send these letters once a year or every time a gift is generated, it's a must!