

GMCVO

Supporting voluntary action in
Greater Manchester since 1975

Getting the most from CiviMember

- Who are we?
- Getting Started with CiviMember
- Online Member Signup & Renewal
- Creating Member only website content



Getting Started with CiviMember

- What is CiviMember?
- How do I set it up?



Membership Summary Page

CiviMember



Membership Summary

Members by Type	August – (Last Month)			September (MTD)			2012 (YTD)			Current #
	New	Renew	Total	New	Renew	Total	New	Renew	Total	
General	0	0	0 [0]	0	0	0 [0]	11	0	11 [11]	17 [17]
Student	0	0	0 [0]	0	0	0 [0]	10	0	10 [10]	10 [10]
Lifetime	0	0	0 [0]	0	0	0 [0]	2	0	2 [2]	2 [2]
Parents	0	0	0 [0]	0	0	0 [0]	0	0	0 [0]	0 [0]
Totals (all types)	0	0	0 [0]	0	0	0 [0]	23	0	23 [23]	29 [29]

Primary member counts (those who "own" the membership rather than receiving via relationship) are in [brackets].

Recent Memberships

	Name	Type	Member Since	Start Date	End Date	Source	Status	Auto-renew?	
	Yadav, Justin	General	March 12th, 2012	March 12th, 2012	March 11th, 2014	Donation	New		View Edit more ▶
	Adams, Greg	Student	March 11th, 2012	March 11th, 2012	March 10th, 2013	Check	New		View Edit more ▶

New Membership Type

Save

Save and New

Cancel

Name *

e.g. 'Student', 'Senior', 'Honor Society'...

Description

Description of this membership type for display on signup forms. May include eligibility, benefits, terms, etc.

Membership Organization *

Search

Members assigned this membership type belong to which organization (e.g. this is for membership in 'Save the Whales - Northwest Chapter'). NOTE: This organization/group/chapter must exist as a CiviCRM Organization type contact.

Minimum Fee \$

Minimum fee required for this membership type. For free/complimentary memberships - set minimum fee to zero (0).

Contribution Type *

- select -

Select the contribution type assigned to fees for this membership type (for example 'Membership Fees'). This is required for all membership types - including free or complimentary memberships.

Auto-renew Option

You will need to select and configure a supported payment processor (currently Authorize.Net, PayPal Pro, or PayPal Website Standard) in order to offer automatically renewing memberships. ([learn more...](#))

Duration *

- select -

Duration of this membership (e.g. 30 days, 2 months, 5 years, 1 lifetime)

Period Type *

- select -

Select 'rolling' if membership periods begin at date of signup. Select 'fixed' if membership periods begin on a set calendar date. 

Relationship Type

- select -
Benefits Specialist
Benefits Specialist is
Case Coordinator

Memberships can be automatically granted to related contacts by selecting a Relationship Type. 

Visibility

Public

Is this membership type available for self-service signups ('Public') or assigned by CiviCRM 'staff' users only ('Admin')

Order

5

Enabled?

Renewal Reminders

If you would like Membership Renewal Reminder emails sent to members automatically, you need to create a reminder message template and you need to configure and periodically run a 'cron' job on your server. ([learn more...](#))

Renewal Reminder Message

- select -

Select the renewal reminder message to be sent to the members of this membership type.

Renewal Reminder Day

Send Reminder these many days prior to membership expiration.

New Member Type Setup Page

Getting Started with CiviMember

- **What is CiviMember?**

Allows you to have an ongoing historical record of your members

This applies when;

- You use defined membership durations
- You have paid membership
- You would like to allow online signup / renewal

- **How do I set it up?**

- Enable the CiviMember module (from the Admin menu) and create one or more Membership Types
- Set up a Message template for Renewal Reminders

-



Online Member Signup & Renewal

- How can people signup and renew online?



Configure Page - Become a member

Contribution Links ▾

[Title](#) [Amounts](#) [Memberships](#) [Receipt](#) [Tell a Friend](#) [Profiles](#) [Premiums](#) [Widgets](#) [Personal Campaigns](#)

Use this form to enable and configure a Membership Signup and Renewal section for this Online Contribution Page. If you're not using this page for membership signup, leave the **Enabled** box un-checked.. ([learn more...](#))

Membership Section Enabled?
Include a Membership Signup section in this Online Contribution page?

Title - New Membership
Membership section title - for new member signups.

Introductory Message -
New Memberships

B *I* U Font Size

▾

Membership section introductory text - for new member signups.

Title - Renewals
Membership section title - displayed to renewing members.

Introductory Message -
Renewals

B *I* U Font Size

▾

Membership section introductory text - displayed to renewing members.

Membership Price Set here if you want to configure price sets for your site."/>

Membership Types

Include these membership types:	Default: (unselect)
<input checked="" type="checkbox"/> General	<input type="radio"/>
<input checked="" type="checkbox"/> Student	<input type="radio"/>
<input checked="" type="checkbox"/> Parents	<input type="radio"/>

Require Membership Signup
If checked, user must signup for one of the displayed membership options before continuing.

Separate Membership Payment
Check this box if you are including both Membership Signup/Renewal AND a Contribution Amount section, AND you want the membership fee to be charged separately from any additional contribution amount.

Display Membership Fee
Display the membership fee along with the membership name and description for each membership option?

Public Membership Signup Page

Become a member

Here are the benefits of being a member

- 1.
- 2.
- 3.

Become a member

- General - \$ 100.00**
Regular annual membership.
- Student - \$ 50.00**
Discount membership for full-time students.
- Parents - \$ 5.00**

Email Address *

About You

Please fill in as appropriate

First Name *

Last Name *

Phone

Online Member Signup & Renewal

- How can people signup and renew online?
 - Create a Contribution Page
 - Complete any Membership settings and require Membership Registration
 - Add the fields you want to collect (called Profiles)
 - Add any Payment settings
 - Test the live Contribution page making sure it works for anonymous users as required



Creating Member only website content

- Only Logged in users see specific content / features if they have the correct membership type of the right status
- This is available with both the Drupal and Joomla CMS software installations
“Synchronize CiviCRM Contacts with a set Membership Status to a specified Role automatically”



Example Member-Synchronise Settings

ASSOCIATION RULE

Choose a CiviMember Membership Type and a Drupal Role below. This will associate that Membership with the Role. If you would like the have the same Membership be associated with more than one role, you will need to add a second association rule after you have completed this one.

Select a CiviMember Membership Type *

Student ▼

Select a Drupal Role *

Student Website Permissions ▼

CIVIMEMBER STATUS RULES

Select which CiviMember Status Rules will be used for "Current" and "Expired" status. A "Current" status rule will add the above role to a user account. An "Expired" status rule will remove the above role from a user account.

Current Status *

- New
- Current
- Grace
- Expired
- Pending
- Cancelled
- Deceased
- One month to go

Select all CiviMember Status Rule(s) that represent current status.

Logged in Student - No Membership

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Membership Test Site

Making farming great

Main menu

[Home](#)

[CiviCRM](#)

[Events List](#)

[Subscribe](#)

[News](#)

[Contact](#)

Home Page

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[Click here to access CiviCRM](#)

Create a Membership for the Student

 **Test Student**

New Membership

Save

Save and New

Cancel

Member **Test Student**

Membership Organization and Type

Type Select Membership Organization and then Membership Type.

Source

Source of this membership. This value is searchable.

Member Since (clear)

When did this contact first become a member?

Start Date (clear)

First day of current continuous membership period. Start Date will be automatically set based on Membership Type if you don't select a date.

End Date (clear)

Latest membership period expiration date. End Date will be automatically set based on Membership Type if you don't select a date.



Status Override?

Record Membership Payment?

Check this box to enter or update payment information. You will also be able to generate a customized receipt.

Send Confirmation and Receipt?

Automatically email a membership confirmation and receipt to gibsonoliver@hotmail.com?

Save

Save and New

Cancel

Logged in Student - Active Membership

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Membership Test Site

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Main menu

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Student Members Area

- [My Membership Details](#)
- [Student Resources](#)
- [Forum](#)
- [My Events](#)
- [Log Me Out](#)

Home Page

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[Click here to access CiviCRM](#)

- For more information on working with and setting up CiviMember see <http://book.civicrm.org/user/>

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Funded by



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Registered Office as above