

Portal Prodigy[™]
Membership Features in Detail

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www.portalprodigy.com

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1.1 Introduction

The Membership Feature provides a highly flexible system for offering, promoting, signing-up and managing members online. Be careful not to confine your interpretation of this feature only to “memberships” as in a club or association. Instead, think of members as a specifically privileged group. Membership Types can be assigned to all kinds of groups such as employees, specific department staff, managers, contributors, parishioners, reporters and journalists, constituents, vendors, customers, prospects, etc.

Membership Types are used to classify groups of contacts in order to control access to specific website functionality and to trigger events specific to given membership types -- events such as billing, program notifications, surveys, news delivery, exchange announcements, press releases, etc. For example, some organizations provide separate memberships to access different exchanges such as employer job posting and applicant resume posting. Others use membership types to separate donation levels such as Gold Sponsor, Silver Sponsor and Bronze Sponsor. In such cases, Gold Sponsors might get privileged access to all the sponsor facilities while Silver and Bronze get less accordingly. Some associations create an “Expert” membership type and charge a fee for that membership. Expert members then enjoy listing in the online Expert Directory, receive leads from our “Ask the Expert” feature, and may sell products and services through our exchange feature. Subscriptions to publications and other features are controlled through this feature also.

The possible number of membership types is virtually unlimited. So, it's up to you to find creative ways to provide paid and/or unpaid access to the many benefits of your portal.

Membership feature benefits include:

- Ability to define an unlimited number of unique Membership Types.
- Each Membership Type can have different fees, acceptance requirements, and benefits.
- Allows members to join more than one Membership Type, e.g. National Membership and International Membership or Book of the Month Club and DVD of the Month Club.
- Create informative Membership Descriptions. Integrates with PORTALPRODIGY Document Editor to create colorful descriptions without knowledge of HTML.
- Ability to attach online brochures to provide additional information including beautiful and dazzling multi media presentations as well downloadable and printable formats.
- Integrated with the PORTALPRODIGY Mini Browser Feature Component to include solicitations for membership on your site's home page.
- Membership Types support Initiation Fees, Renewal Fees and Recurring Dues Fees.
- Recurring dues can be specified in days or as “annual”, “quarterly” or “monthly”.

Membership Features in Detail

- Initiation Fee and Recurring Dues can be prorated for calendar year, quarter, or month; fixed for calendar year, quarter, or month; or fixed for specified time period.
- Membership provides lock option, to preserve fee amount with additional option to fix the fees for set period of time or an indefinite period (such as lifetime).
- Supports promotional codes to apply discounts to membership fees.
- Ability to require fees to be paid at time of application submittal or upon approval.
- Ability to define Membership application forms and questionnaires.
- Tracks approval date and approved by.
- Option to include a Membership Agreement.
- Option to require that Membership Agreement either be: (a) signed and returned as hard copy; or (b) offered as online acceptance page.
- Automated Membership billing. Supports user preference to have credit card automatically billed or to be invoiced.
- Creates invoices for membership billings with ability to send as email or printed and mailed based on user preference setting for each member.
- Membership collection and online payment processing using credit cards or Pay Pal.
- Membership Application report which lists each applicant's signup information with their completed application form.
- Membership Renewal report which lists each member due for renewal along with fees and payment method.
- Membership Dues Collection report which lists each new member, their membership fees, amount collected and amounts currently due , Grouped by Membership Type with subtotal by Group.
- Option to send automated Membership Renewal notices by email.
- Option to send automated Membership Approval notices by email.
- Specify a PORTALPRODIGY Security Group that is automatically assigned to new members when they are approved for membership.
- Specify a PORTALPRODIGY Security Group that is automatically assigned to expired members.
- Provide auto response notification that sends email to responsible party upon application for new membership.

Some of the components, fields and settings of the Membership feature, discussed in detail in this chapter, are:

Membership Fees Feature

Management Page

Instructions
Fiscal Date
Cost of Goods Sold
Inventory Account
Receivables Account
Revenue Account

Search For Membership Types Page

Include deactivated records in search results: Y/N
Membership Type ID
Title -
Created Date Range
Modified Date Range
Items Per Page b
Quick Search on Application Title

Membership Types Management page:

Title:
Description:
Sort Order:
Brochure
Agreement Document
Acceptance Type
Acceptance Notes
Application Required
Application:
Approval Required
Approval GroupID
Pay Required to Activate
Allow online cancellation
Membership By

- Individual
- Company:
- Both

Individual Signup Form
Company Signup Form
Name
Phone
Email:
Pre-Approved Group
Approved Group
Expired Group
Reporting Class
Name
Address 1
Address 2
City:
State:
Zip:

Initial Term
Recurring Terms
Days to Bill Before Due
Prorate Initiation
Prorate Recurring
Lock Days Recurring Fee
Lock Days Renewal Fee
Dues Anniversary

- Signup Date:
- Approval Date:
- Specified Anniversary Date
- Days To Approve

Pay Online:
Pay By Mail:
Pay On-Account:
WelcomeKit Template:
Renewal Template:
Inactivity Template:
Rejection Template:
Initiation Fee

- Description
- Price

Renewal

- Description
- Price

Recurring

- Description
- Price

Other

- Description
- Price

Created By
Modified By
Active
Expires Date
ChapterID
Items Management page for Membership Fees

Feature
Feature Record ID
Type
Item Name
Price
Cost
Default Item?
Product Type
Interval
Days

- Monthly
- Quarterly
- Annual Calendar

- Annual Fiscal

Days
Start Date
Prorate
Include Next Period
Cost of Goods Sold
Inventory Account
Revenue Account
Search for Applications page
Application ID
Title
Created Date Range
Modified Date Range:
Items Per Page:
Quick Search on Application.
Application Management page
Application Title
Description:
Allow Repetitive:
Response Notification Email:
Questions:
Question ID:
Question Type:

- Choice:
- Text:
- Memo:

Maximum Answers -
Order #
Choices
Created By
Modified By
Active:
ChapterID
Topic
Private
Go to Question:

- First Question
- Previous Question
- Next Question
- Last Question:

Membership Management page:
Membership Type:
Member Name:
Application:
Agreement Document
Locked Recurring Fee
Anniversary Date
Membership ID
Initial Order
Company Name
Application Status

- Not Completed
- Pending
- Approved

Agreement Status

Locked Renewal Fee:

Automated Charge on Credit
Card:

Payment Type:

Name on Card or Check:

Number:

Expiration Date (Month/Year)

Address:

City:

State:

Zip

Created By

Modified By

Active

Search for Memberships

ID:

Member Name:

App Status:

Application:

Membership Editor

1.2 The Visitor Experience

Visitors can access Membership Signup via a variety of methods including menu links, broadcasted emails, web site content pages and home page mini browsers. Links can be configured to either take the Visitor directly to a specific Membership page or to listing of available Membership Types.

The following is an example of a PORTALPRODIGY Home Page Mini Browser advertisement soliciting membership. Mini Browsers are defined in the Administrator portion of the site. The page positioning and style of Mini Browsers are dependent on the site template and other administrator definable options. The following is an example of a Mini Browser with the heading *Become a Member*:



The Become a Member Mini Browser includes a brief description (tickler) and a Join Now link which takes the visitor to the Membership Types page, where the visitor can browse through the Membership Types offered by your organization, view brochures and signup as a new member.

Membership Types

Please select one of the membership types listed below. Then follow the steps to complete the signup process.

Premier Membership for Employers

Provides full access to all services for employers including unlimited search and resume exchanges.

Software Professionals of So Cal Members

Receive the Software Industry Insights Newsletter, participate in forums and events, and use the Opportunity Exchange to share professional opportunities with qualified members.

The Membership Types displays general instructions (defined in the Administrative portion of the site) followed by the name of each Membership Type and a summary description. The Visitor clicks on the Membership Type name to view a Membership Details page like the page shown below:

Membership

Details

Software Professionals of So Cal Members

Description: Receive the Software Industry Insights Newsletter, participate in forums and events, and use the Opportunity Exchange to share professional opportunities with qualified members.




Join

Initiation Fee:	Initiation Fee	\$99.00
Renewal Fee:	Renewal	Free


Recurring Fees Options:

	Recurring Dues - Billed Monthly	\$9.95
	Recurring Dues - Billed Quarterly	\$24.95
	Recurring Dues - Billed Annually	\$89.95
Other (optional):	Annual Retreat - Includes Airfare	\$895.00

For Additional Information Contact: Brock Miller • 949.595.8300x100 • brock@brmln.net

 [Brochure](#)  [Print](#)  [Join](#)

From this page the visitor can print a printer friendly version of the page. The visitor can also view a brochure for the membership type that can be formatted as a beautiful and dazzling multi media presentation.

The visitor clicks on  **Join** to begin the signup process. If the visitor is not logged in, PORTALPRODIGY prompts them to login or register as a new user, as shown below:

If you already have a user account please login now, otherwise click on Signup to register as new user.

Login Email Address:

Password:

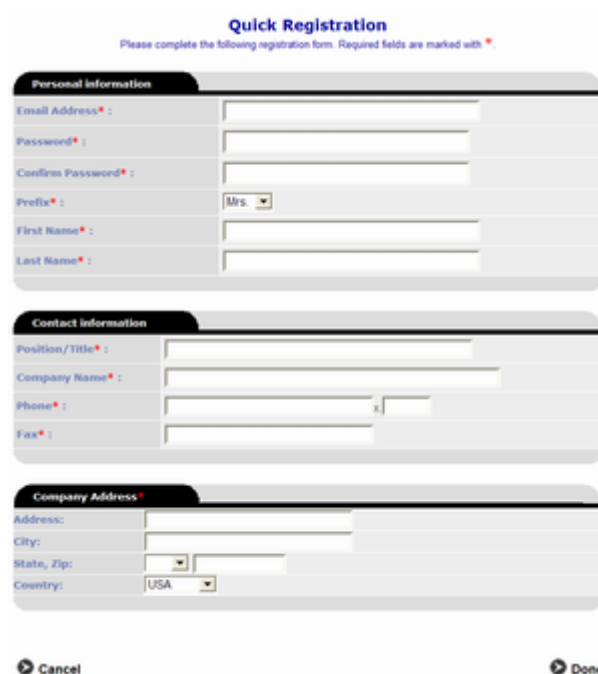
☐ Remember password

 **Login**

first time users
Sign up
here 

 [Forgot your login email address or password?](#)

A specialized Quick Registration form can be created for each Membership Type to capture the applicant's membership applicable contact information. The following is an example of a specialized Quick Registration form for Organizational (Company) memberships vs. individual memberships:





The image shows a 'Quick Registration' form with three main sections: Personal Information, Contact Information, and Company Address. The Personal Information section includes fields for Email Address, Password, Confirm Password, Prefix (with a dropdown menu showing 'Mrs'), First Name, and Last Name. The Contact Information section includes fields for Position/Title, Company Name, Phone, and Fax. The Company Address section includes fields for Address, City, State/Zip (with a dropdown menu), and Country (with a dropdown menu showing 'USA'). At the bottom of the form are 'Cancel' and 'Done' buttons.

After completing the registration form, the membership applicant is returned to the Membership Agreement page, if an Agreement is attached; otherwise the membership applicant is taken to a Membership Application/Questionnaire page, if an Application is attached; otherwise the membership applicant is taken directly to the Membership Fees page.



The image shows a dialog box titled 'Do you accept the terms of this Agreement?' with 'No' and 'Yes' buttons. The dialog box contains text explaining the built-in document editor, the ability to cut and paste text from Windows applications, and the requirement for online acceptance of the terms/agreement. It also mentions that the Terms/Acceptance document can be provided on the website without requiring the member applicant's direct approval. At the bottom, it says 'See the MME User Manual for additional explanation of Acceptance.'

Depending on the option settings for Membership Type, the membership applicant may either be required to accept the Membership Agreement online by clicking on the  button or  **Print Screen** icon to print the form and submit a signed copy by mail or fax.

Software Membership

Please provide the following information:

Register

What type of software do you make or use?

We developed software for non profit associations. Our software, NPMMS, does everything a non profit would want to do. And it is the world's easiest software for non profit associations to use.

We also provide a variety of services to non profits.

Which of the following are you?

☐ Independent Consultant

☒ Non-Owner Employee of Company

☐ Principal/Owner of Company

[Top of Page](#) [Cancel](#) [Save](#) [Done](#)

The membership application presents the member applicant with an online questionnaire. It can contain questions requiring textual input, multiple choice single response, and multiple choice multi selection responses.

Membership Fees

Details

Premier Membership for Employers

Fee Type	Price
Initiation Fee	\$500.00
Recurring Fees Options:	
<input checked="" type="checkbox"/> Monthly	\$50.00
<input type="checkbox"/> Quarterly	\$125.00

Payment Method: Pay by credit card

Payment Type: Visa

[Close](#) [Next Step](#)

The Membership Fees page lists the applicable fees and fee options. It also lists the Payment Method and Payment Types options. Depending on the Membership Type options, the membership applicant may be required to select from a list of Recurring Fee options, Optional Fees options, and payment options.

Payment

Please fill in your payment information

Payment Information

Account number: 4123456789012345 Visa

Name on Card: Linda Miller

Expiration Month: 1

Expiration Year: 2007

Payment Date: 07/06/2003

Credit Card Billing Address **Online Billing Address**

Address 1: 2100 Newport Blvd

City/State/Zip: Newport Beach CA 92660

Country: USA

[Cancel](#) [Next](#)

The membership applicant is then required to provide payment information applicable to the Payment option they have selected.

When payment is made by credit card, the membership applicant is prompted with the following questions: “Would you like to have your recurring dues automatically billed to

your credit card?”. Responding with Yes sets up their account to automatically bill their credit card for each recurring billing cycle.

Membership Approval

You have completed the membership signup process. Please verify that all information on the order is correct. If everything is correct and you accept the Terms and Conditions press OK to confirm your registration. The system will then assign an Order# and display the finalized Order so you can print it. Note that once you press OK, your order is consider finalized and it cannot be changed.

If you have any questions please call 949.595.8300.

Details

Membership Type: Premier Membership for Employers
Description: Provides full access to all services for employers including unlimited search and resume exchanges.

Bill To:

Name: Linda Miller
Attn: Linda Miller
Address 1: 2150 Newport Blvd
Address 2:
City: Newport Beach CA, 92660
Country: USA
Phone: 949.890.1000 x 09
Fax: 949.890.7777
Email: Linda@demo.com

Ship To:

Quantity	Part#	Desc	Unit Price	Extended Price
1	Initiation Fee		\$000.00	\$000.00
1	Monthly - August		\$10.00	\$10.00
1	Monthly - July Promotion		\$41.94	\$41.94

Payment Method: Pay Online

Payment Type: Visa

Shipping Carrier: Ship-Telnet

Shipping Method: Ship-Telnet

Allow Partial Payment: Yes

Total: \$091.94

The membership applicant is then taken to the Membership Approval page which displays their membership order and requires confirmation by pressing OK. When *Pay Online* is selected this page displays the following instructions:

Membership Approval

You have completed the membership signup process. Please verify that all information on the order is correct. If everything is correct and you accept the Terms and Conditions press OK to confirm your registration. The system will then assign an Order# and display the finalized Order so you can print it. Note that once you press OK, your order is consider finalized and it cannot be changed.

If you have any questions please call 949.595.8300.

When *Payment By Mail* is selected, the following is displayed at the top of the Membership Approval page:

Membership Approval

You have completed the membership signup process. Please verify that all information on the order is correct. If everything is correct and you accept the Terms and Conditions press OK to confirm your registration. The system will then assign an Order# and display the finalized Order so you can print it. Note that once you press OK, your order is consider finalized and it cannot be changed.

If you have any questions please call 949.595.8300.

We accept the following payment types by Mail:

American Express **Cash**
Check **Master Card**
Visa

Please mail your check payable to:
Brolin Corp.
17 Hammond, Suite 406
Irvine 92618
USA
Be sure to include your confirmation number with your payment.

After selecting OK, the Membership Receipt page is displayed, providing a printer friendly version for printing and confirming submittal of the membership.


Depending on the Membership Type options defined in Administration, the new member will be assigned to an applicable Security Group giving them access rights to various online resources and feature components.

1.3 Components

Membership Types Feature contains the following components.

1.3.1 Membership Fees Feature Management page

The screenshot shows a web interface titled 'Options'. It contains a large text area labeled 'Instructions 1' with a small icon of a document and pencil. Below this is a 'Fiscal Date' field with a date picker icon.

- **Instructions** - used to define instructions that are displayed on the Membership Types Selection page in the Visitor portion of the site. Excepts either text or HTML. Click on  to use the PORTALPRODIFY Document Editor.
- **Fiscal Date** - used to specify the Accounting Year End date used by your organization. If your organization uses a calendar year enter the value 12/31/2003. PORTALPRODIFY ignores the year.

The screenshot shows a web interface titled 'Default GL Accounts'. It contains four rows, each with a label and a dropdown menu: 'Cost of Goods Sold:', 'Inventory Account:', 'Receivables Account:', and 'Revenue Account:'. The 'Revenue Account' dropdown is currently set to 'Sales'.



- **Cost of Goods Sold** - used to provide a default account number for Membership Types costs posting to the GL Transactions Journal. The default Cost of Goods Account number can be overridden in Membership Types Management.
- **Inventory Account** - used to provide a default account number for Membership Types inventory posting to the GL Transactions Journal. The default Inventory Account number can be overridden in Membership Types Management.
- **Receivables Account** - used to provide a default account number for Membership Types receivables posting to the GL Transactions Journal. The default Recievables Account number can be overridden in Membership Types Management.

- **Revenue Account** - used to provide a default account number for Membership Types revenue posting to the GL Transactions Journal. The default Revenue Account number can be overridden in Membership Types Management.

1.3.2 Search For Membership Types page:

- **Include deactivated records in search results:** when unchecked, only active records are included. Check to include reactivated records.
- **Membership Type ID** - search on the record ID assigned to Membership Types.
- **Title** - search on the Membership Types Title (name).
- **Created Date Range** - entering a date in the first text box only retrieves all Membership Types with Created Date greater than or equal to the entered date. Entering a range is inclusive of entered date values.
- **Modified Date Range** – used to search by date last modified range. Works the same as Created Date Range.
- **Items Per Page** – used to control how many matches are listed at a time. Defaults to **10**. If the number of matches is greater than the specified Items Per Page, PORTALPRODIGY provides navigation options for the additional pages of matches This feature minimizes network traffic.
- **Search** : the **Search** button submits the entered search criteria and displays the matches.
- **Quick Search on Application Title** - click on a letter button to display all Applications with Title beginning with the selected letter.

<< Back	Returns to the previous page.
Add New	Opens the Application Management page to create a new application form.
Clear	Clears the search criteria.




	Prints the website page to the user's local printer.
	Closes the page and returns to the Site Administration Menu.

1.3.3 Membership Types Management page:



Used to define Membership Types.




- **Title:** this is the name that will be displayed for the Membership Types. It is displayed as a link on the Membership Types page which lists all the Membership Types offered by your organization.
- **Description:** this is the description displayed in the Membership Type page which lists all the Membership Types offered by your organization and the Membership page which displays the details about the Membership Type. It is used to describe the features and benefits of the Membership Type.
- **Sort Order:** used to define the primary order that the Membership Type is listed on the Membership Types listings page. A secondary alphabetical sort is done on types with the same Sort Order number. Enter an integer.
- **Brochure** - used to add a brochure that is included as a link on the Membership page. When creating a new Membership Type the following options are available:

- Click on the  Add Brochure icon to upload a new brochure from you computer.
- Click on the  Edit Brochure icon to create a brochure using the PORTALPRODIGY Document Editor.
- Enter a Resource Document ID in the text box or click on the  Search for Brochure Icon to find and link a Brochure that is in the PORTALPRODIGY Resource Library. If you intend to include links to the brochure elsewhere within your website or would like visitors to be

able to view it from the Resource Library, it is recommended to add it in Document Management, then use this option to attach it to the Membership Type.

- When editing an existing Membership Type some additional options are displayed as shown and described below:






- Click on the  View Brochure icon to open the Brochure.
- Click on the  Update Brochure icon to replace the existing Brochure with a new or updated one located on your computer. It displays a File Browser to select a file located on your computer and upload to PORTALPRODIFY.
- Click on the  Checkout Brochure icon to download the existing Brochure to your computer for editing. When the Membership Type is saved it will display the Checked Out user name and date as shown below:





- Click on the  Delete Brochure icon to remove the Brochure.


- **Agreement Document:** used to add a Membership Agreement Document that is included as a link on the Membership page. When online Agreement Acceptance is enabled, the Agreement Document must be either a Text or HTML document. When creating a new Membership Type the following options are available:

- Click on the  Add Membership Agreement Document icon to upload a new Membership Agreement Document from you computer.

- Click on the  Edit Membership Agreement Document icon to create a Membership Agreement Document using the PORTALPRODIGY Document Editor.
- Enter a Resource Document ID in the text box or click on the  Search for Brochure Icon to find and link a Membership Agreement Document that is in the PORTALPRODIGY Resource Library. If you intend to include links to the Membership Agreement Document elsewhere within your website or would like visitors to be able to view it from the Resource Library, it is recommended to add it in Document Management, then use this option to attach it to the Membership Type.
- When editing an existing Membership Type some additional options are displayed as shown and described below:

- Click on the  View Membership Agreement Document icon to open the Membership Agreement Document.

- Click on the  Update Membership Agreement Document icon to replace the existing Membership Agreement Document with a new or updated one located on your computer. It displays a File Browser to select a file located on your computer and upload to PORTALPRODIGY.

- Click on the  Checkout Membership Agreement Document icon to download the existing Membership Agreement Document to your computer for editing. When the Membership Type is saved it will display the Checked Out user name and date.


- Click on the  Delete Brochure icon to remove the Brochure.

- See Resource Library Chapter Document Management section for additional information.



- **Acceptance Type:** applies to the membership agreement. The following choices are offered:

- Select *Not Required* (default) when you do not require the member to acknowledge acceptance of a membership agreement.
- Select *Online* when you require the member to acknowledge acceptance and to enable this online as *Yes/No* option.
- Select *Signature* when you require the member to acknowledge acceptance and require a handwritten signature. This option requires the applicant to print the Membership Agreement and mail a signed copy to your organization.
- **Acceptance Notes** - used to provide the visitor instructions, displayed on the Membership Agreement Acceptance page.
- **Application Required:** select *No* (default selection) to not require a Membership Application.
- **Application:** used to attach an online application form. Includes the following options:

- Click on the  icon to search for and select an existing application form or to create a new one. For additional information see the Application Management section, which follows the Membership Types Management section.
- Once an application has been attached, it is displayed as shown below. Click on the name of the application to edit it.



- **Approval Required** - select *Yes* when the membership applicant must be approved for membership. When set to *No*, the membership Approval Status is automatically set to Approved.
- **Approval GroupID** - select the Group that is responsible for evaluating and approving memberships. Groups are Security Groups, which are defined in Security Group Management and assigned to individuals using Contact Management.

- **Pay Required to Activate** - select *Yes* to require that payment be received prior to activating the new member's membership.
- **Allow online cancellation** - select *Yes* to allow members to cancel their membership online.

A screenshot of a web form titled "Signup Options". It contains three sections: "Membership By:" with radio buttons for "Individual" (selected), "Company", and "Both"; "Individual Signup Form:" with a dropdown menu showing "Standard Registration"; and "Company Signup Form:" with an empty dropdown menu.

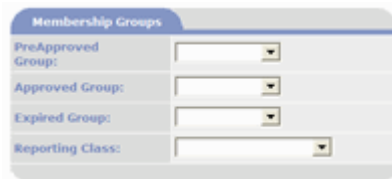
- **Membership By** - select from one of the following choices:
 - **Individual** - select when the Membership Type is for individuals only
 - **Company:** select when the Membership Type is for companies (Organizations) only.
 - **Both** - select when the Membership Type can be joined by both individuals and companies.
- **Individual Signup Form** - used to select a Registration form for collecting contact information from the membership applicant when the membership applicant is an individual. This form only applies when Membership By has been set to either Individual or Both. See the Quick Registration Builder Chapter for how to create specialized registration forms that can be used by Membership Types.
- **Company Signup Form** - used to select a Registration form for collecting contact information from the membership applicant when the membership applicant is a company. This form only applies when Membership By has been set to either Company or Both. Note that all Registration (Signup) forms, including those for a company, require the registrant first and last name and their contact information. See the Quick Registration Builder Chapter for how to create specialized registration forms that can be used by Membership Types.

A screenshot of a web form titled "For More Information". It contains three input fields: "Name:" with the text "Brock Miller", "Phone:" with "949-595-8300" and "ext. 100", and "Email:" with "brock@brolin.net".

- **Name** - enter the name of the individual, department, or group within your organization that visitors may contact for additional information about the

Membership Type. This information is displayed on the Membership details page.

- **Phone** - enter the phone number of the individual, department, or group within your organization that visitors may contact for additional information about the Membership Type. This information is displayed on the Membership details page.
- **Ext.:** enter the phone extension, if applicable for the individual, department, or group within your organization that visitors may contact for additional information about the Membership Type. This information is displayed on the Membership details page.
- **Email:** enter the email address of the individual, department, or group within your organization that visitors may contact for additional information about the Membership Type. This information is displayed on the Membership details page.

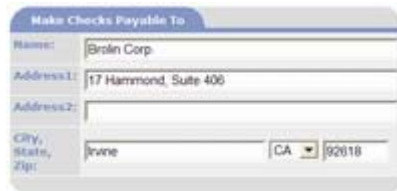


The screenshot shows a web form titled "Membership Groups". It contains four rows, each with a label and a dropdown menu:

Membership Groups	
PreApproved Group:	<input type="text"/>
Approved Group:	<input type="text"/>
Expired Group:	<input type="text"/>
Reporting Class:	<input type="text"/>

- **Pre-Approved Group** - select the Security Group that the member is assigned to upon submission of their membership application. Used to assign access rights to the resources and features within your organization's PORTALPRODIFY website.
- **Approved Group** - select the Security Group that the member is assigned to upon approval of their membership. Used to assign access rights to the resources and features within your organization's PORTALPRODIFY website.
- **Expired Group** - select the Security Group that the member is assigned to when their membership renewal has lapsed. Used to assign access rights to the resources and features within your organization's PORTALPRODIFY website.
- **Reporting Class** - select a reporting class from the list. Reporting Classes provide a method of grouping and filtering data on reports. E.g. You may have two classes of Memberships "Organization Memberships" and "Individual Memberships" and for each type you may have several Membership Types such as "Platinum Organization Membership", "Gold Organization Membership", and "Silver Organization Membership"; and for individuals you may have "Individual Lifetime Membership" and "Individual Annual Membership". Printing a Members Listing by Organization would only list "Platinum Organization

Membership”, “Gold Organization Membership”, and “Silver Organization Membership” members.

A screenshot of a web form titled "Make Checks Payable To". The form has several input fields: "Name:" with "Brolin Corp" entered, "Address 1:" with "17 Hammond, Suite 406" entered, "Address 2:" which is empty, "City, State, Zip:" with "Irvine" entered in the city field, "CA" in the state dropdown, and "92618" in the zip field.

- **Name** - enter the name that members are to make their payments payable to. Typically this is your organization’s name. This information is displayed on the Payment page and is included on Membership Invoices.
- **Address 1** - enter the address where members are to send their payments to. This information is displayed on the Payment page and is included on Membership Invoices.
- **Address 2** - used when a second address line is required. Enter the second address line where members are to send their payments to. This information is displayed on the Payment page and is included on Membership Invoices.
- **City:** enter the address City where members are to send their payments to. This information is displayed on the Payment page and is included on Membership Invoices.
- **State:** enter the address State where members are to send their payments to. This information is displayed on the Payment page and is included on Membership Invoices.
- **Zip:** enter the address postal Zip code where members are to send their payments to. This information is displayed on the Payment page and is included on Membership Invoices.

A screenshot of a web form titled "Fee Options". The form contains several fields and dropdowns: "Initial Terms:" with a dropdown set to "Due Upon Invoice", "Recurring Terms:" with a dropdown set to "Net 15", "Days To Bill Before Due:" with a text input of "30", "Prorate Initiation:" with a dropdown set to "No", "Prorate Recurring:" with a dropdown set to "Yes", "Lock Days Recurring Fee:" with a text input of "365", "Lock Days Renewal Fee:" which is empty, "Dues Anniversary:" with three radio buttons, the first of which ("Signup Date") is selected, and "Days to Approve:" which is empty.

- **Initial Term** - assigns the members payment terms for their initial membership payment. Select a term from the list. Payment Terms are maintained in Feature

Management. An individual member's payment terms can be changed in Member Management.

- **Recurring Terms** - assigns the members payment terms for payment of recurring dues and renewal fees. Select a term from the list. An individual member's payment terms can be changed in Member Management.
- **Days to Bill Before Due** - determines when invoices are created and broadcast.
- **Prorate Initiation** - set to Yes to prorate the Initiation Fee amount for the remainder of the period. When set to No, it will charge the full Initiation Fee Amount.
- **Prorate Recurring** - set to Yes to prorate the selected Recurring Fee amount for the remainder of the current period. When set to No, it will charge the full Recurring Fee Amount for the current period.
- **Lock Days Recurring Fee** - Enter the number of days from the Dues Anniversary date that the member's recurring fees are protected from being increased.
- **Lock Days Renewal Fee** - Enter the number of days from Dues Anniversary date that the member's renewal fees are protected from being increased.
- **Dues Anniversary** - select one of the following options to determine the dues anniversary date:
 - **Signup Date:** when this option is selected the Anniversary Date shall be set to the date the member completes the Membership Signup form.
 - **Approval Date:** when this option is selected the Anniversary Date shall be set to the date the date that the membership is approved.
 - **Specified Anniversary Date** - when this option is selected, the Anniversary Date must be entered in each Members's Membership record.
 - **Days To Approve** - Enter the average number of days it takes to process a membership for approval.

Accepted Payment Methods	
Pay Online:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Pay By Mail:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Pay On Account:	<input type="radio"/> Yes <input checked="" type="radio"/> No

- **Pay Online:** check to offer the Payment Type as a choice during online payment entry.

- **Pay By Mail:** check to offer the Payment Type as a choice when Pay By Mail is selected. PORTALPRODIGY will print this Payment Type on the invoice.
- **Pay On-Account:** check to allow the Payment Type as choice when payment is being entered for invoices charged on account (given terms).

The screenshot shows a form titled "Membership Notifications". It contains four rows, each with a label and a dropdown menu:



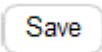







- WelcomeKit Template: [dropdown menu]
- Renewal Template: [dropdown menu]
- Inactivity Template: [dropdown menu]
- Rejection Template: [dropdown menu]


- **WelcomeKit Template:** used to specify an email that is automatically sent to each new member upon completion of signup process. (See the chapter on Broadcast Management for instructions on how to create email broadcast templates.) The list box lists all broadcast templates with object type set to “Membership”.
- **Renewal Template:**used to specify an email that is automatically sent to notify members whose membership is due for renewal. (See the chapter on Broadcast Management for instructions on how to create email broadcast templates.) The list box lists all broadcast templates with object type set to “Membership”.
- **Inactivity Template:** used to specify an email template that is automatically sent to members that do not log into the website for a specified length of time. Helps promote involvement and more active membership. (See the chapter on Broadcast Management for instructions on how to create email broadcast templates.) The list box lists all broadcast templates with object type set to “Membership”.
- **Rejection Template:** used to specify an email that is automatically sent to member applicants whose membership application has been rejected. (See the chapter on Broadcast Management for instructions on how to create email broadcast templates.) The list box lists all broadcast templates with object type set to “Membership”.

The screenshot shows a table titled "Fee Types". The table has two columns: "Description" and "Price".

Description	Price
Initiation Fee	
Initiation Fee	\$99.00
Renewal	
Renewal	\$0.00
Recurring	
Recurring Dues - Billed Monthly	\$9.95
Recurring Dues - Billed Quarterly	\$24.95
Recurring Dues - Billed Annually	\$89.95
Other	
Annual Retreat - Includes Airfare	\$895.00

- **Initiation Fee -** used to define an initial fee for the membership.

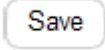



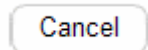
- **Description** – enter a description of the fee.
- **Price** – enter the dollar amount of the fee.
-  click on this icon to edit the Initiation Fee's options. (See the section on Membership Fees Items Management for additional explanation.) If the  icon is not visible, save the Membership Type record by clicking  button. The  icon will then be visible.
- **Renewal** - used to define a renewal fee for the membership. If the Initiation Fee is for a lifetime membership, do not create a Renewal fee.
 - **Description** – enter a description of the fee.
 - **Price** – enter the dollar amount of the fee.
 -  click on this icon to edit the Renewal fee's options. (See the section on Membership Fees Items Management for additional explanation.)
- **Recurring** - used to define one or more recurring fee options for the membership.
 -  click on this icon to add a new Recurring fee option. (See the section on Membership Fees Items Management for additional explanation.)
 - **Description** – enter a description of the fee.
 - **Price** – enter the dollar amount of the fee.
 -  click on this icon to delete the recurring fee option.
 -  click on this icon to edit the recurring fee's options. (See the section on Membership Fees Items Management for additional explanation.)
- **Other** - used to define one or more optional one time fees.
 -  click on this icon to add a new Other fee option. (See the section on Membership Fees Items Management for additional explanation.)
 - **Description** – enter a description of the fee.
 - **Price** – enter the dollar amount of the fee.
 -  click on this icon to delete the Other fee option.

-  click on this icon to edit the fee's options. (See the section on Membership Fees Items Management for additional explanation.)

Record		
Created By:	Brock Miller	06/28/2003
Modified By:	Brock Miller	07/09/2003
Active:	<input type="button" value="Yes"/>	
Expires Date:	<input type="text"/>	
ChapterID:	1	

- **Created By** – the name of the user that created the record and the date it was created. Lists user's first name followed by last name.
- **Modified By** – the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.
- **Active** – by default this value is set to “Yes”, which means the record is active and available for use. To deactivate a record, set it to “No”. Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.
- **Expires Date** - by default this is empty. When a date is entered, the membership will no longer be available in the Public Interface after the expiration date. The membership shall still be accessible using Membership Management.
- **ChapterID** – This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.

Option Buttons:

-  used to save the data and continue working on the page.
-  used to delete current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.
-  used to print the current page (contents of your browser window) according to your browser's print settings.
-  used to displays the Report Selection page listing reports applicable to the page.
-  used to close the page discarding all entries and edits.

- Close used to close the page and save changes. PORTALPRODIGY will prompts to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

1.3.4 Items Management page for Membership Fees:

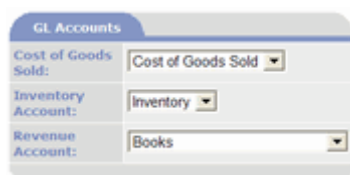
Item Description	
Feature:	Membership
Feature Record ID:	3
Type:	Item
Item Name:	Recurring Dues - Billed Monthly
Price:	\$9.95
Cost:	

Used to define Membership Fee options. This page is called by clicking on the Add or Edit icons in the Fee Types section of the Membership Types Management page. PORTALPRODIGY creates an Items record for each membership fee.

- Feature** - automatically set to Membership. Cannot be changed when the Items Management page is called from Membership Types Management page.
- Feature Record ID** - the record ID for the Membership Type the Item belongs to.
- Type** - defaults to Service. This value should not be changed. The other values Discount and Adjustment are for future use.
- Item Name** - enter the name to be displayed for the Fee option.
- Price** - enter the fee to be charged for the option.
- Cost** - you may optionally enter a cost, which can be used for reporting purposes.

Special Options	
Default Item?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Product Type:	<input checked="" type="radio"/> Recurring <input type="radio"/> Other
Interval:	<input type="radio"/> Days <input checked="" type="radio"/> Monthly <input type="radio"/> Quarterly <input type="radio"/> Annual Calendar <input type="radio"/> Annual Fiscal
Days:	<input type="text"/> Start Date: <input type="text"/>
Prorate:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Include Next Period:	<input checked="" type="radio"/> Yes <input type="radio"/> No

- **Default Item?** Defaults to NO. Set to YES to cause this Item to be included on all new Membership Types.
- **Product Type** - defaults to RECURRING. Set to Recurring when the Fee option is a Recurring Fee; otherwise set to OTHER.
- **Interval** - select the interval the fee applies to.
 - **Days** – select this option to set the interval to a specific number of days then enter the number of days in the Days text box field below.
 - **Monthly** – select this option to set the interval to one month.
 - **Quarterly** – select this option to set the interval to one quarter.
 - **Annual Calendar** – select this option to set the interval to one year beginning on January 1 and ending on December 31.
 - **Annual Fiscal** – select this option to set the interval to one year beginning on the Start Date or the first day of the Fiscal Year specified in Membership Features Management.
- **Days** - used when Interval is set to Days. Enter the number of days in the dues period.
- **Start Date** - used when Interval is set to Annual Fiscal. Enter a date corresponding to the starting Month and Day for the Fee Option.
- **Prorate** - set to YES to prorate the price of the Item for the remainder of the current period. Set to NO to charge the full price of the Item for the current period.
- **Include Next Period** – when set to Yes and Prorate is set to YES, the fee is calculated as the fee for the current prorated period plus the next period's fee. When either Include Next Period is set to No or Prorate is set to No, the next period is not included in the fee.





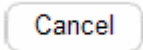
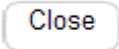


GL Accounts	
Cost of Goods Sold:	Cost of Goods Sold
Inventory Account:	Inventory
Revenue Account:	Books

- **Cost of Goods Sold** - select the GL Account that the Items cost is to be debited to.

- **Inventory Account** - select the GL Account that the Items cost is to be credited to.
- **Revenue Account** - select the GL Account that the Items price is to be credit to.

Option Buttons:

-  used to save the data and continue working on the page.
-  used to delete current record. PORTALPRODIFY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.
-  used to print the current page (contents of your browser window) according to your browser's print settings.
-  used to displays the Report Selection page listing reports applicable to the page.
-  used to close the page discarding all entries and edits.
-  used to close the page and save changes. PORTALPRODIFY will prompts to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

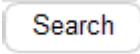
1.3.5 Search for Applications page:




Used to search for membership applications. It displays all membership applications matching the entered criteria and provides link to view and edit the membership application.

Include deactivated records in search results: when unchecked, only active records are included. Check to include reactivated records.


- **Application ID** - search on the record ID assigned to Application.
- **Title** - search on the Application Title (name).
- **Created Date Range** - entering a date in the first text box only, retrieves all Applications created on or after the specified date. Entering a range is inclusive of entered date values.
- **Modified Date Range:** used to search by date last modified range. Works the same as Created Date Range.
- **Items Per Page:** used to control how many matches are listed at a time. Defaults to **10**. If the number of matches is greater than the specified Items Per Page, PORTALPRODIGY provides navigation options for the additional pages of matches This feature minimizes network traffic.

-  : the **Search** button submits the entered search criteria and displays the matches.
- **Quick Search on Application Title** - click on a letter button to display all Applications with Title beginning with the selected letter.

-  : the **Back** button returns to the previous page.

-  : the Add New button opens the Application Management page to create a new application form.

-  : the Clear button clears the search criteria.

-  : the Print button prints the browser window according to the users prints settings.

-  : closes the page and returns to the Site Administration Menu.

1.3.6 Application Management page:

Note that Application Management uses the Survey Engine. Except for the page title the pages and options are the same in Application Management as in Survey Management.

The screenshot shows the 'Application Management' page with the 'Application Details' tab selected. The form includes the following fields:

- Application Title:** A text input field.
- Description:** A large text area for providing details.
- Allow Repetitive:** A dropdown menu currently set to 'Yes'.
- Response Notification Email:** A text input field for the administrator's email.

- **Application Title** - used to assign a name for identifying the application.
- **Description:** used to provide an explanation and instructions displayed at the top of the application form.
- **Allow Repetitive:** for applications leave this set to the default value *Yes*. When building surveys in Survey Management this option controls whether the respondent is allowed to take the survey more than once.
- **Response Notification Email:** used to send an email to an Application Administrator each time a Membership Application is submitted. Enter the email address of the applicable Administrator or leave blank if notification is not desired.

The screenshot shows the 'Question Details' page with the 'Question Details' tab selected. The form includes the following fields:

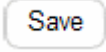
- Question:** A text input field for the question text.
- Question ID:** A text input field for a unique identifier.
- Question Type:** Radio buttons for 'Choice' (selected), 'Test', and 'Memo'.
- Maximum Answers:** A text input field set to '1'.
- Order #:** A text input field for sequencing.
- Choices:** A large text area for listing possible answers.

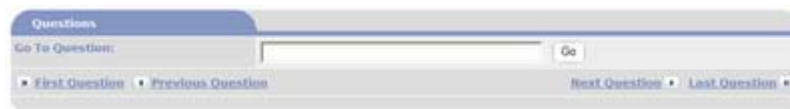
- **Question:** enter the question to be displayed on the form. The following are example questions:
 - *Years in business?*
 - *Select your areas of interest:*
 - *Would you like to be contacted to serve on a committee?*
 - *Number of employees?*
 - *Social Security Number:*

- *Describe your community service history:*
- **Question ID:** assigned automatically by PORTALPRODIGY when the question is saved.
- **Question Type:** defines the type of response required for the question. Select from one of following options:
 - **Choice:** select to provide two or more choices. Select this option for Yes/No, True/False, and multiple choice questions.
 - **Text:** select to require limited textual input. This option causes a text box to be displayed on the form. Select this option when collecting data such as a Social Security Number.
 - **Memo:** select to require unlimited textual input. This option causes a memo input control to be displayed on the form. Select this option when collecting narrative data such as Community Service History.
- **Maximum Answers** - applies only when Choice is selected as the Question Type. Determines the number of answers that can be selected for multiple choice questions. Defaults to 1. Yes/No and True/False questions should be set to 1. Setting to 1 displays the choices as radio buttons on the form. When set to 2 or more, it displayed the choices as checkboxes on the form.
- **Order #** - controls the order of the question on the form. Enter integer values only.
- **Choices** - applies only when Choice is selected as the Question Type. Used to enter the applicable choices. Choices may be entered as single words or phrases. Enter a single choice per row (line). Use the Enter key to terminate a row and move to the next row (line).

Record	
Active:	Yes
Expires Date:	
ChapterID:	1
Topic:	None
Private:	No

Record		
Created By:	Administrator Administrator	11/20/2001
Modified By:	Brock Miller	08/02/2002
Active:	Yes	
Expires Date:	12/31/2005	
ChapterID:	1	
Topic:	None	
Private:	No	

- **Created By** - the name of the user that created the record and the date it was created. Lists user's first name followed by last name.
- **Modified By** - the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.
- **Active:** by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.
- **ChapterID** - This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.
- **Topic** - by default this value is set to "None", meaning the application or survey is not assigned to a Topic. To assign it to a Topic, select one using the list box. Topics are used to breakdown the display of applications or surveys within Categories. Topics are defined in Survey Features Management.
- **Private** - by default this value is set to "No", which means the record is publicly available to all visitors of your site. To limit access to authorized users only, set to "Yes" then check each Security Group to be granted access. Security Groups are only listed when Private is set to "Yes".
-  - when entering the first question, the Save button creates the application record and causes additional options and information to be displayed on the forms record section and the additional Questions section as shown below ; thereafter it saves the currently entered or edited question.



- **Go to Question:** used to search the application/survey form for a question containing the entered text. It is helpful for locating questions when the form contains many questions. Otherwise use the navigation options explained below:
 - **First Question** - displays the first question on the form.
 - **Previous Question** - displays the previous question on the form.
 - **Next Question** - displays the next question on the form.

- **Last Question:** displays the last question on the form.
- **Add Question** : saves the current question if has not already been saved and clears the page for a new question.
- **Delete Question** - deletes the currently displayed question. PORTALPRODIGY always prompts to confirm before deleting.
- **Delete** : used to delete the entire application or survey. PORTALPRODIGY always prompts to confirm before deleting.
- **Broadcast** - used to send a solicitation email broadcast to selected recipients promoting membership. See Broadcasting Chapter for additional explanation.
- **Reports** - used to print reports. Displays the Report Selection page listing survey reports.
- **Close** - used to close the application management page and optionally save the question currently added or edited.

1.3.7 Membership Management page:

Membership Management			
Data			
Membership Type:	Premier Membership for Employers	Membership ID:	1 Initial Order
Member Name:	Brock Miller Contact Record	Company Name:	Brolin Corp.
Application:		Application Status:	Approved
Agreement Document:	16.htm	Agreement Status:	Accepted
Locked Recurring Fee:		Locked Renewal Fee:	
Anniversary Date:	06/25/2003	Automated Charge on Credit Card:	No

Used to view and edit membership records. Also used to approve memberships.

- **Membership Type:** displays the name of the Membership Type.
- **Member Name:** display the members First and Last Name.
- **Application:** displays the name of the application form.

- **Agreement Document** - displays the name of the agreement document.
- **Locked Recurring Fee** - used to specify a renewal fee for the member, thus locking in a specific fee amount that is not affected by increases in renewal fees for new members. Defaults to the value specified in Membership Type Management page at the time of membership signup.
- **Anniversary Date** - used to specify the initial date that the membership is active. PORTALPRODIGY determines the default date based on the Membership Type settings. This value can be changed to start the membership on a different date.
- **Membership ID** - displays a unique ID that is assigned to the Membership by PORTALPRODIGY at the time of signup.
- **Initial Order** - click on this link to view a copy of the initial Order/Invoice for the Membership.
- **Company Name** - If the user specified a Company Name it is displayed here.
- **Application Status** - used to select the membership status. The following choices are available:
 - **Not Completed** - this is assigned if the member applicant saves the application without completing it.
 - **Pending** - this is assigned by PORTALPRODIGY when the member applicant saves the completed application. This status is used to indicate the application either needs to be reviewed or is being reviewed and is pending approval.
 - **Approved** – this is assigned when a member of your organization approves the members application.
- **Agreement Status** - displays member applicant's acceptance status. When a member responds online with *No* to Do acceptance, their membership signup is terminated. of set to Accepted when
- **Locked Renewal Fee:** the guaranteed not to exceed renewal fee amount. If empty, the member's fee is not locked in.
- **Automated Charge on Credit Card:** set to *Yes* to have PORTALPRODIGY automatically bill the member's credit card for all recurring and renewal fees. The billing information listed below is used for the automatic billing. When set to *No*, PORTALPRODIGY will generate an invoice to either be emailed or printed and postal mailed to the member.

Billing Information	
Payment Type:	American Express
Name on Card or Check:	
Number:	(Credit Card, Check, or Credit Memo #)
Expiration Date (Month/ Year):	MM YY
Address:	(If required by Credit Card Company)
City/State/Zip	

- **Payment Type:** used to select one of the available payment types such as Visa, Master Card, etc. Defaults to the type used for the Initial payment if one was made.
- **Name on Card or Check:** the Bill To name. When billing to a credit card this must match the name on the credit card. Defaults to the name used for the Initial payment if an initial payment was made.
- **Number:** the credit card or check number. Defaults to the number used for the Initial payment if an initial payment was made.
- **Expiration Date (Month/Year)** - the credit card expiration. Defaults to the number used for the Initial payment if an initial payment was made.
- **Address:** the billing address street address including suite or apartment number. When billing to a credit card this should match the billing address on file with the credit card institution. Defaults to the number used for the Initial payment if an initial payment was made.
- **City:** the billing address city. When billing to a credit card this should match the billing address city on file with the credit card institution. Defaults to the number used for the Initial payment if an initial payment was made.
- **State:** the billing address state. When billing to a credit card this should match the billing address state on file with the credit card institution. Defaults to the number used for the Initial payment if an initial payment was made.
- **Zip** - the billing address postal zip code. When billing to a credit card this should match the billing address postal zip code on file with the credit card institution. Defaults to the number used for the Initial payment if an initial payment was made.

Record	
Created By:	Brock Miller 06/25/2003
Modified By:	Brock Miller 06/25/2003
Active:	Yes

- **Created By** - the name of the user that created the record and the date it was created. Lists user's first name followed by last name.

- **Modified By** - the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.
- **Active** - by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.

1.3.8 Search for Memberships:

Search For Memberships

Search Criteria ☐ Include deactivated records in search results

Membership Type: Application Status:

Membership ID: Member ID:

First Name: Last Name:

Created Date Range: to Modified Date Range: to

Items Per Page:


Used to find memberships based on entered search criteria.

Found Memberships

Page 1 of 1 Total matches: 7

ID	Member Name	App Status	Application	Membership
1	Miller, Brock	Approved		
2	Brolin, Jim	Approved		
3	Miller, Ryan	Approved		
4	Miller, Brock			
5	Miller, Linda	Approved		
6	Applicant1, Joe	Approved		
7	Applicant2, Jane	Pending		

- **ID:** the unique Membership record ID assigned by PORTALPRODIGY.
- **Member Name:** the member's Last Name followed by their First Name.
- **App Status:** the member's application status. There are four possible statuses *Not Completed*, *Pending*, *Approved*, or *Declined*.
- **Application:** click on the edit icon to display the member's application in edit mode.

- **Membership:** click on the  edit icon to display the member's membership record in edit mode.

1.4 Feature Administration

Before visitors can begin to signup for Membership the following must be setup:

- Configure Membership Features Management
- Create Membership Types
- Define your Membership Approval Process
- Define your Membership Billings Process & define required Terms

Membership has four distinct processes:

1. Define Membership Types & Fees
2. Membership signup process.
3. Membership approval process.
4. Membership billing process.

For each Membership Type that a contact or company signs up for, the system creates a Membership record in the Memberships table. Note that a contact or company may signup for and be a member of more than one Membership Type.

Each Membership record can have only one application (link to a Survey record). If approval of the Membership Type is required, the approval status is recorded in the Membership record. Membership records have one or more related Order records, which are created when fees are billed. When a Membership is for a Company, the Contact ID is used to specify the Primary Contact, thus all Memberships have a Contact record. The contact record is created from either the Signup page or the Contact/Member Management page. Each Membership Type may specify a Registration form that is substituted for the one specified in Features Management User Signup page, such that if the member applicant needs to signup after clicking on Join, the Registration form specified for the Membership they are signing up for shall be displayed; if they already have a login this does not apply.

The system creates an Order record with Order Items for each applicable membership fee. When a payment is entered into the system, the system creates a Payment Transaction record. More than one Payment record can be created in order to enter partial payments; however, when online payment is required, the Order amount must be paid in full. When membership type requires approval, the member also has an Application record that is created using the Survey Engine, which creates a Survey record and one or more corresponding Answer records. The Application Approval page is used to review and approve applications. Approval status, approved by and approval dates are stored in the Membership record.

Links to Membership can be created using the Menu Builder, Mini Browser Builder and/or Greeting Management where Greeting tags link to either the Membership Types page that lists all available memberships or directly to a specific Membership Type's Membership Detail page.

The Membership Features page is used to configure parameters to support Membership Types.

The Membership Type Management page is used to add and edit Membership Types.

Membership is included as an Order Features Type. Membership billing can be done via the Invoicing process, which provides the ability to automate the creation of Membership Invoices for new Members, Recurring Dues and Renewals.

Once an Administrator has learned how to create surveys the Administrator will understand how to create Membership Applications because applications are also created using the Survey Engine;


If your organization requires members to be approved for membership, create one or more Security Groups for Approving Membership and assign to the individuals that are responsible for this. This done using Security Group Management then using Contact Management to assign the responsible individuals to the Security Group.

1.5 Tutorials

1.5.1 Configuring Membership:

- Go to Feature Management page.
- Check Membership Fees.
- Click on Membership Fees link to display the Membership Fees Feature Management page.




- Enter Instructions to be displayed on the Membership Types Selection page in the Visitor portion of the site. Click on  to use the PORTALPRODIFY Document Editor.



- Into Fiscal Date, enter the Accounting Year End date used by your organization. If your organization uses a calendar year enter the value *12/31/2003*. PORTALPRODIGY ignores the year.
- Select Default GL Accounts. See Accounting Chapter for more information.



1.5.2 Add a New Membership Type:

- Go to the Site Administration menu
- Click the Membership Types  icon. Note that you may also select the Add New option on the Search For Membership Types page.
- Enter a name and description to be displayed in the visitor portion of the Website.



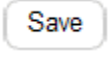
- You may attach a Brochure and an Agreement Document. Click on the  Add Brochure icon to upload a new brochure from you computer or click on the  Edit Brochure icon to create a brochure using the PORTALPRODIGY Document Editor. Use the same options for adding or creating an Agreement Document.
- Acceptance Type options:
 - If you elect to not have an Agreement Document or do not require the membership applicant to acknowledge acceptance of the Agreement Document, leave the Acceptance Type set to *Not Required*.

- If you require the membership applicant to acknowledge acceptance of the Agreement Document and wish to do this electronically, set Acceptance Type to *Online*.
- If you require the membership applicant to acknowledge acceptance of the Agreement Document with a handwritten signature, set Acceptance Type to *Signature*. Be sure to enter instructions in the Acceptance Notes field explaining this along with the mailing address where the membership applicant shall mail their signed copy of the Acceptance Document. The Acceptance Notes are displayed during the Membership Signup process in the Visitor portion of the Website.
- To define a Membership Application or Questionnaire, follow the instructions on
- Set the Membership Approval parameters.
- Set the Signup Options as follows:
 - If the Membership Type is only for individuals, then select the *Individual* radio button and select an Individual Signup Form.
 - If the Membership Type is only for companies, then select the *Company* radio button and select a Company Signup Form.
 - If the Membership Type is for both Companies and Individuals, select the *Both* radio button and select both an Individual Signup Form and a Company Signup Form.




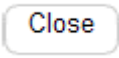
Member Applicants must either log in (if they are already registered as user on your Website) or they must signup as a new user. Signup Forms are Quick Registration forms that are used for collecting the signup contact information (For more info see Quick Registration Builder section in the Features Management Chapter.) If you do not specify a Signup Form in the Membership Signup options, PORTALPRODIGY will use the default Signup Form specified in Feature Management for User Signup.

- In the tab section For More Information, specify a contact person and their contact phone number and email. This information will be displayed on the Membership details page in the visitor portion of the Website, including a link to automatically generate an email.
- In the tab section Membership Groups, specify which Security Group that PORTALPRODIGY should automatically assign the Member to, for each condition.
- In the tab section Make Checks Payable To, enter the name that checks should be made out to and the address they should be sent to. This will be displayed on the Membership Payments page during the membership signup process.


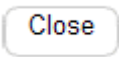
- In the tab section Fee Options set the parameters to determine how the membership fees will be billed.
 - Only set Initial Terms when Pay On Account is allowed.
 - If the Membership Type includes Renewal or Recurring Fees, then select a Recurring Terms and specify in Enter the Days To Bill Before Due, how many days prior to the terms due date to print invoices.
 - Set the options for Prorating and Locking Fees.
 - Set the Dues Anniversary option to determine when the membership starts.
 - If Member Applicants require approval before they can become members, then enter into Days to Approve the average number of days it takes to process applications.
- In the tab section Accepted Payment Methods select each payment method to be available to membership applicants.
- In the tab section Membership Notifications select the notification to be used for sending emails for each condition. These are used to specify the email template to be used by the Auto Broadcaster.
- In the tab section Fee Types, define the Fee Types applicable to the Membership Type. A Membership Type may have one Initiation Fee, one Recurring Fee, one or more Recurring Fee options from which the member applicant must select one, and one or more optional Other Fees from which the member applicant can select none to all. Note that the edit options for each Fee Type are not available until after saving the new Membership Type for the first time. So, click , which is located at the bottom of the page.

To charge an Initiation Fee:


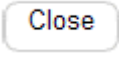
- Click on the  icon to the right of the Initiation Fee. This will display the Items Management page.
- Leave Type set to *Service*.
- In Item Name you may replace *Initiation Fee* with a different name.
- In Price enter the fee amount.
- Leave Default Item set to *No*.

- Leave Product Type set to *Initial*.
- Set the Interval for the Initiation Fee. If the Initiation Fee is not for a specific period then do not select an Interval. E.g. “Lifetime Membership”. Note that once you clicked on an Interval and saved the Fee Item, you cannot reset to no Interval.
- If Days is selected as the Interval, then enter the number of days into the Days field.
- If the Membership starts on a specific day of the year other than the Calendar or your Fiscal Year, then specify a Start Date; otherwise leave Start Date empty. Start Date only uses the day and month, ignoring the year of the date.
- Set the Prorate and Include Next Period options. It is suggested that Prorate only be set to *Yes*, when the Recurring Fee is equal to or greater than the Initiation Fee; otherwise it is suggested to leave Prorate set to *No*, especially when the Interval is equal to a year or greater.
- If the PORTALPRODIGY GL Journal Entries feature is enabled select the applicable GL Accounts.
- Click  and confirm save.


To charge a Renewal Fee:

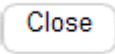
- Click on the  icon to the right of the Renewal Fee. This will display the Items Management page.
- Leave Type set to *Service*.
- In Item Name you may replace *Renewal* with a different name.
- In Price enter the fee amount.
- Leave Default Item set to *No*.
- Leave Product Type set to *Renewal*. Note that the Renewal Fee’s Interval is automatically set to the same Interval as the Initiation Fee.
- If the PORTALPRODIGY GL Journal Entries feature is enabled select the applicable GL Accounts.
- Click  and confirm save.

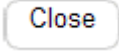
To add a Recurring Fee:

- Click on the  icon to the right of the Recurring label. This will display the Items Management page.
- In Item Name enter the name for the Recurring Fee.
- In Price enter the fee amount.
- Leave Default Item set to *No*.
- Leave Product Type set to *Recurring*.
- Set the Interval for the Recurring Fee option.
- If Days is selected as the Interval, then enter the number of days into the Days field.
- Leave Start Date empty.
- Set the Prorate and Include Next Period options.
- If the PORTALPRODIGY GL Journal Entries feature is enabled select the applicable GL Accounts.
- Click  and confirm save.

To add an Other Fee:

- Click on the  icon to the right of the Other Fee label. This will display the Items Management page.
- Leave Type set to *Service*.
- Enter an Item Name.
- In Price enter the fee amount.
- Leave Default Item set to *No*.
- Leave Product Type set to *Other*. Note that the Other Fees do not have Intervals. They are one time fees that are billed as part of the initial Membership billing (Order).

- If the PORTALPRODIGY GL Journal Entries feature is enabled select the applicable GL Accounts.
- Click  and confirm save.

When finished defining the Membership, click  located at the bottom of the Membership Types Management page and confirm save.

1.5.3 New Member Signup:

- The Membership Signup process works similar to the Event Registration process, however it has the potential to include more options. A typical membership type configuration will take the user through the following steps.
 - a. View list of Membership Types and select one (if only one this step will be skipped)
 - b. View Membership Details including Description and Fees.
 - c. Select “Join”.
 - d. If applicable, prompt user to select whether Membership is for Individual or Company/Organization
 - e. Login or complete User Signup (form specified by Membership type).
 - f. Download or view Membership Agreement online and accept.



- g. Complete Membership Application form (if required).
- h. Select Fee Options (if options are available otherwise skip this step).

Membership Fees

Details

Software Professionals of So Cal Members

	Fee Type	Price
Initiation Fee:	Initiation Fee	\$99.00
Recurring Fees Options:		
	<input checked="" type="radio"/> Recurring Dues - Billed Monthly	\$9.95
	<input type="radio"/> Recurring Dues - Billed Quarterly	\$24.95
	<input type="radio"/> Recurring Dues - Billed Annually	\$89.95
Other (optional):		
	<input type="checkbox"/> Annual Retreat - Includes Airfare	\$895.00
Payment Method:	Pay by credit card	
Payment Type:	Visa	

Close

Next Step

- i. Payment of Fees (if required), or applicable instructions such as where to mail payment or that payment is due upon acceptance.

Payment

Please, fill in your payment information

Payment Information

Account number:

Visa

Name on Card:

Expiration Month:

MM

Expiration Year:

YY

Payment Date:

07/25/2003

Credit Card Billing Address

Retrieve Billing Address

Address 1:

City/State/Zip:

CA

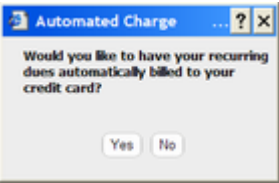
Country:

USA

Cancel

Next

- j. Offer automatic billing of recurring fees.



- k. Membership Order approval.
- l. Membership Order Receipt.

1.5.4 Search For Membership Types

Used to search and select Membership Types for retrieval in the Membership Types Management page.

Search For Membership Types

Search Criteria
☐ Include deactivated records in search results

Membership Type ID:

Title:

Created Date Range:

to

Modified Date Range:

to

Items Per Page:

Search

1.5.5 View a Contact's Membership:

- Retrieve the Contact in Contact Management.
- Click on Memberships link.

Contact Management

Complete the Contact Registration form. Required fields are marked with *. You must supply at least one email address.

Contact information for Donna Applicant5

Contact ID:

Title:

Profession:

Company Name:

Biography

Orders

Memberships

Security Groups

Contact Types

- Each Membership Type that the member belongs to is listed as shown below:

Page 1 of 1				Total matches:2
Membership Type	Approval Date	Application	Anniversary Date	Billing Information
Premier Membership for Employers			06/25/2003	
Software Professionals of So Cal Members		Software Membership		

Close

- From this page you can view their Membership data and approve a member's application.
- To view the member's application, click on the abbreviated name of the application, which is displayed in the Application column of the grid.

Software Membership

Jane Applicant2

[Contact](#) [Order](#)

Please provide the following information.

Replies

What type of software do you make or sale?

gambling software.

Which of the following are you?

☐ Independent Consultant

☒ Non-Owner Employee of Company


☐ Principle/Owner of Company

Application Status

Application Status: Pending

Rejection Note:

[Top of Page](#)
[Close](#)
[Submit](#)

- To approve the Application, change the Application Status from *Pending* to *Approved* and click [Submit](#) .
- To reject the Application, change the Application Status from *Pending* to *Rejected* and optionally enter an explanation in the Rejection Note then click [Submit](#) .
- When no changes are made, click [Close](#) to return to the listing of the Member's Membership Types.
- To view the Member's Membership Information click on the  icon.

Membership Management			
Data			
Membership Type:	Software Professionals of So Cal Members	Membership ID:	4 Initial Order
Member Name:	Brock Miller Contact Record	Company Name:	Brolin Corp.
Application:	Software Membership	Application Status:	Not Completed ▾
Agreement Document:	18.htm	Agreement Status:	Pending ▾
Locked Recurring Fee:	<input type="text"/>	Locked Renewal Fee:	<input type="text"/>
Anniversary Date:	<input type="text"/>	Automated Charge on Credit Card:	No ▾
Billing Information			
Payment Type:	American Express ▾		
Name on Card or Check:	<input type="text"/>		
Number:	<input type="text"/> (Credit Card, Check, or Credit Memo #.)		
Expiration Date (Month/ Year):	MM ▾ YY ▾		
Address:	<input type="text"/> (If required by Credit Card Company)		
City/State/Zip	<input type="text"/>	<input type="text"/>	<input type="text"/>
Record			
Created By:	Brock Miller	07/06/2003	
Modified By:	Brock Miller	07/06/2003	
Active:	Yes ▾		

- To view the membership order click on Initial Order. This displays the Order Management page in a separate browser window. (See the Orders Chapter for additional information.)
- When finished viewing the Order, close the browser window displaying the Member Management page.