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## NPSP: Working with Memberships

This article will provide a background and basic understanding of the membership model implemented in the Nonprofit Starter Pack. The membership model is available in the Households package of the starter pack, for version 2.0.x and above.

## Membership Basics

The screenshot shows a Salesforce interface for selecting an opportunity record type. At the top, it says "New Opportunity" and "Select Opportunity Record Type". Below this, a message states: "Select a record type for the new opportunity. To skip this page in the future, change your record type settings on your personal setup page." The main section is titled "Select Opportunity Record Type" and contains a dropdown menu labeled "Record Type of new record" with "Membership" selected. Below the dropdown are "Continue" and "Cancel" buttons. At the bottom, there is a section titled "Available Opportunity Record Types" with a table listing three options: Donation, Grant, and Membership.

Record Type Name	Description
Donation	Donation Received
Grant	Grant Received
Membership	

Beginning in version 2.0 of Households, the Nonprofit Starter Pack allows you to select an Opportunity (Donation) recordtype to be used as a membership type for the purposes of rollups to Contact, Account (Organization) and Household. The recordtype need not necessarily be named 'Membership' to work

## Opportunity Membership Fields

Opportunity  
Barack Obama- Donation 5/13/2011

Customize Page | Edit Layout | Printable View | 1

Show Chatter | Following

Contact Roles (1) | Open Activities (0) | Activity History (0) | Notes & Attachments (0) | Stage History (2) | MyChildObjects (0)

**Opportunity Detail** [Edit] [Delete] [Clone] [Add Matching Donation]

▼ Donation Information

Opportunity Owner	Admin User [Change]	Opportunity Record Type	Membership [Change]
Opportunity Name	Barack Obama- Donation 5/13/2011	Primary Campaign Source	Test
Account Name	Barack Obama	Recurring Donation	
Amount	\$550.00	Lead Source	
Close Date	5/13/2011	Type	
Stage	Posted	Probability (%)	100%

▼ Membership Fields

Membership Start Date	5/31/2010	Member Level	Gold
Membership End Date	5/31/2011	Membership Origin	Renewal

▼ System Information

Created by Admin User 5/13/2011 9:48 AM | Last Modified by Admin User 5/16/2011 11:14 AM

▼ Description Information

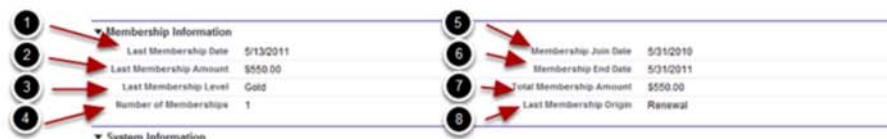
Description

The Nonprofit Starter Packs comes with four new membership-specific fields for the opportunity (Donation) record. They are:

- Membership Start Date
- Membership End Date
- Member Level
- Membership Origin

*NOTE: The location, visibility and accessibility of these fields will be dependant on your own organization's configuration. If the fields are not currently visible, you may need to edit the page layout for your membership opportunity recordtype to display them.*

## Contact Membership Fields



The value of the four opportunity membership fields, in addition to some standard opportunity field, is 'rolled up' to the Contact, Household and/or Account (Organization) record as appropriate. For the Contact record, the mapping between the Opportunity (Donation) membership fields and the Contact membership fields is as follows:

1. **Last Membership Date** -> The most recent Close Date from a Closed-Won Opportunity (Donation) that is defined as a membership type
2. **Last Membership Amount** -> The most recent Amount from a Closed-Won Opportunity (Donation) that is defined as a membership type
3. **Last Membership Level** -> The most recent Membership Level from a Closed-Won Opportunity (Donation) that is defined as a membership type
4. **Number of Memberships** -> The total count of the number of Closed-Won Opportunities (Donations) defined as a membership type.

5. **Membership Join Date**->The oldest Membership Start Date value from a Closed-Won Opportunity (Donation) defined as a membership type.
6. **Membership End Date**-> The most recent Membership End Date value from a Closed-Won Opportunity (Donation) defined as a membership type.
7. **Total Membership Amount** -> The aggregate sum total of the Amount from Closed-Won Opportunities (Donation) defined as a membership type.
8. **Last Membership Origin**-> The most recent value from the Membership Origin field from a Closed-Won Opportunity (Donation) defined as a membership type.

*NOTE: The location, visibility and accessibility of these fields will be dependant on your own organization's configuration. If the fields are not currently visible, you may need to edit the page layout for your Contact records to display them*

Household Membership Fields

▼ Membership			
Last Membership Date	5/13/2011	Membership Join Date	5/31/2010
Last Membership Amount	\$550.00	Membership End Date	5/31/2011
Last Membership Level	Gold	Total Membership Amount	\$550.00
Number of Memberships	1	Last Membership Origin	Renewal
		Membership Span	1
		Membership Status	Current
▼ Custom Information			

Household records provide the same 8 fields as the Contact record above, as well as two new fields. The primary difference between the Contact and Household fields is that Household fields show membership information in aggregate for all members of a Household, not just an individual Contact. The two additional fields on Household are as follows:

1. **Membership Span** -> A formula field that takes the value of the year of the Membership End Date field and subtracts the year of the Membership Join Date field. (In the screenshot above, this is 2011-2010 = 1)
2. **Membership Status**-> A formula field using the following formula: If the Membership End Date is earlier than today, then it looks to see if the end date is older than 31 days from today. If so, it will show the value of 'Expired'. Otherwise, it will indicate 'Grace Period'. Otherwise, if the Membership End Date has no value, this field will contain no value. Otherwise, the value will be 'Current'.

*NOTE: The location, visibility and accessibility of these fields will be dependant on your own organization's configuration. If the fields are not currently visible, you may need to edit the page layout for your Household object to display them.*

Account Membership Fields

▼ Membership			
Last Membership Date	5/13/2011	Membership Join Date	5/1/2011
Last Membership Amount	\$55.00	Membership End Date	11/10/2011
Last Membership Level	Bronze	Total Membership Amount	\$55.00
Number of Memberships	1	Last Membership Origin	Renewal

The Account (Organization) record contains the same membership fields (and mappings) as the Contact record listed above. Any non-1x1 Account used in the Opportunity Account Name field will have values rolled up to the Account, instead of to the primary contact.

*NOTE: The location, visibility and accessibility of these fields will be dependant on your own organization's configuration. If the fields are not currently visible, you may need to edit the page layout for your membership opportunity recordtype to display them.*

# When are Membership Values Rolled Up?

The following conditions must be met before a membership record's values are rolled up:

1. The record type must be called out in the Household Settings.
2. For updates to happen automatically, 'Roll up Opps in Triggers' must be checked.

In addition, all of the following must also be true for inserting new membership records:

1. Amount field must have a value (\$0 is an acceptable value)
2. Opportunity must be in a closed/won stage (Posted, or some other user defined stage value that is closed/won)

For updates, one of the following must be true:

1. The Stage must change from a non-closed/won to a closed/won stage, OR
2. The Amount value must change, OR
3. The Close Date must change, OR
4. the Account Name value must change.



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