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NPSP: Create and Manage Memberships

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Overview

Memberships in NPSP represent an individual or household giving a donation to join a group or organization, much like a subscription. It is up to the organization to decide the length and level of membership based on the donation amount.

In the Nonprofit Success Pack, Memberships are tracked through the Opportunity object. Memberships can't exist on an Account or Contact without an Opportunity, as any Membership-related data on the Account or Contact is driven by that Opportunity. Any manual update to the Membership fields on a Contact or Account will be overwritten by the nightly automated process.

Some info about Membership Rollups . . .

In addition to standard functionality on the Membership Opportunity that you might expect, such as Membership start and end dates and Membership Level (Gold, Silver and Bronze), NPSP Memberships provide an additional rollup capability. The rollup collects donation information from related Membership Opportunities and aggregates it on a Household Account or Contact. For example, if a Contact has two Memberships with two different groups, the Contact would have two Opportunities showing the amount donated to become a member (let's say \$100 each). Those two amounts would be added together and appear in the Membership Information section on the Contact record.

Setup—Before You Begin

If you downloaded a trial org with the Nonprofit Success Pack, then the Memberships feature is ready to use. There is no required setup, but there are some optional customizations you may want to use.

If you installed Nonprofit Success Pack directly from the installer, then you'll need to set up the Membership record type before you can track Membership Opportunities.

- (Optional) Set a Grace Period
- (Optional) Customize Member Levels
- Set up the Membership Record Type

(Optional) Set a Grace Period

After a Membership expires, the Membership Status is set to Grace Period. This is the period of time (in days) before the Membership Status is set to Expired. You can choose how long you want the grace period to last. The default is 30 days.

1. Click the **NPSP Settings** tab, then click **Donations | Membership**.
2. Click **Edit**, and enter a value in the **Membership Grace Period** field.
3. Click **Save**.

(Optional) Customize Member Levels

Memberships in NPSP include out-of-box member levels: Gold, Silver, and Bronze. You may want to customize these names or add more values. You can do so by editing the picklist values for the **Member Level** field on Opportunities. For information on editing picklists, see [Add or Edit Picklist Values](https://help.salesforce.com/apex/HTViewHelpDoc?id=updating_picklists.htm) (https://help.salesforce.com/apex/HTViewHelpDoc?id=updating_picklists.htm) in the Salesforce Help & Training.

Set up the Membership Record Type

1. Create the Membership record type.
From **Setup**, enter `Record Types` in the Quick Find box, then select **Record Types** under the Opportunities menu. Create a Membership record type.
2. Assign the Membership page layout to the Membership record type.
From **Setup**, enter `Page Layouts` in the Quick Find box, then select **Page Layouts** under the Opportunities menu. Click **Page Layout Assignment** and edit the assignment so the Membership Record Type is using the Membership Page Layout for all appropriate profiles.
3. Ensure that the the Membership record type is selected for rollups.
In **NPSP Settings**, go to **Donations | Membership**. In the Membership Record Type Names menu, select **Membership**.

Donations - Membership

Membership Record Type Names

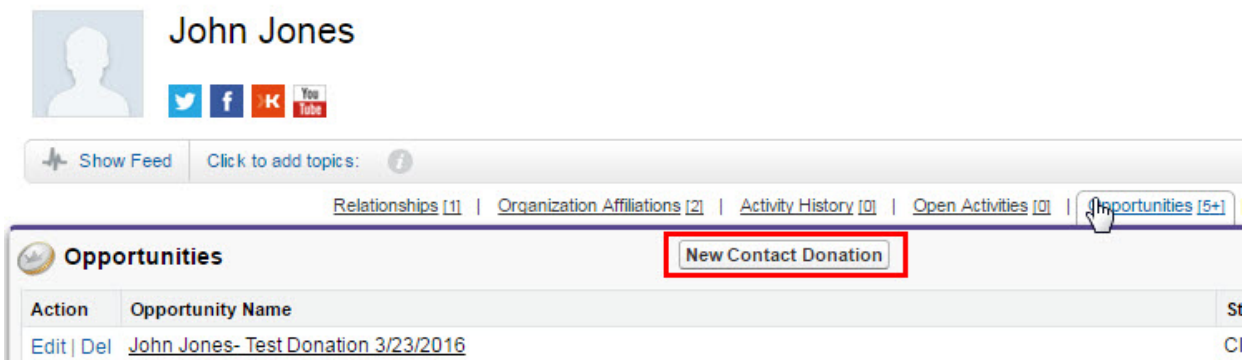
Grant
In-Kind Gift
Major Gift
Matching Donation
Membership

Names of Opportunity Record Types, such as Membership, that you want to roll up separately from other Opportunity Record Types.

Create a Membership

Creating a Membership for a Household or Contact is just like creating any other type of donation. Simply use the **New Contact Donation** button on a Contact or the **New Account Donation** button on an Account.

1. Search for the Contact or Account for this Membership.
2. In the Opportunities related list, click **New Contact Donation** or **New Account Donation**.



The screenshot shows a user profile for John Jones. Below the profile name and social media icons, there is a navigation bar with tabs: Relationships [1], Organization Affiliations [2], Activity History [0], Open Activities [0], and Opportunities [5+]. The Opportunities tab is selected. Below the tabs, there is a section titled 'Opportunities' with a 'New Contact Donation' button highlighted in a red box. Below this button is a table with columns 'Action' and 'Opportunity Name'. The table contains one row with the text 'John Jones- Test Donation 3/23/2016' and a 'St' status column.

3. Select the **Membership** record type.
4. Fill in the required fields:
 - **Opportunity Name:** Filled in by default, but you can change it if you like.
 - **Close Date:** The date you want to recognize the donation amount.
 - **Stage:** Set to **Posted** if you want to recognize the money on the first day of the membership. This will also generate a Payment for the amount entered.
5. Enter a donation **Amount**, **Membership Start Date**, **Membership End Date**, **Member Level**, and **Membership Origin**. Entering this information ensures that the Contact record will show complete rollup

information.

Opportunity Detail

Edit

Delete

Clone

Email Acknowledgment

Refresh Name

Opportunity Name	John Jones- Donation 5/3/2016	Private	<input type="checkbox"/>
Account Name	Jones Household	Primary Campaign Source	
Primary Contact	John Jones	Recurring Donation	
Amount	\$100.00	Stage	Posted
Close Date	5/3/2016	Probability (%)	100%
Lead Source		Batch	
Type		Acknowledgment Status	?
Description		Acknowledgment Date	?

▼ Member Information

Membership Start Date	? 5/3/2016	Member Level	? Silver
Membership End Date	? 5/3/2017	Membership Origin	? New

▼ Payment Information

Number of Payments	? 0	Payment Amount Received	? \$0.00
Remaining Balance	? \$100.00	Payment Writeoff Amount	? \$0.00
		Do Not Automatically Create Payment	<input type="checkbox"/> ?

In this example, since the close date of the Opportunity is 5/3/2016 and the Stage is `Posted`, a Payment was generated.

Membership Fields

Keep in mind that Membership fields are calculated nightly by an automated process. Any manual update to the Membership fields on a Contact or Account will be overwritten by the nightly automated process.

Contact Membership Fields

The values of the membership and Opportunity fields are rolled up to the Contact and Household Account records. These membership fields show up on the Contact:

▼ Membership Information			
Membership End Date	5/3/2017	Membership Join Date	4/13/2016
Last Membership Level	Silver	Last Membership Date	5/3/2016
Last Membership Origin	New	Total Membership Amount	\$200.00
Last Membership Amount	\$100.00	Number of Memberships	2

- **Total Membership Amount:** The aggregate sum total of the Amount from Closed and Won Opportunities (Donation) defined as a membership type.

- **Membership End Date:** The most recent Membership End Date value from a Closed and Won Opportunity (Donation) defined as a membership type.
- **Last Membership Level:** The most recent Membership Level from a Closed and Won Opportunity (Donation) that is defined as a membership type
- **Membership Join Date:** The oldest Membership Start Date value from a Closed and Won Opportunity (Donation) defined as a membership type.
- **Last Membership Date:** The most recent Close Date from a Closed and Won Opportunity (Donation) that is defined as a membership type
- **Last Membership Amount:** The most recent Amount from a Closed and Won Opportunity (Donation) that is defined as a membership type
- **Last Membership Origin:** The most recent value from the Membership Origin field from a Closed and Won Opportunity (Donation) defined as a membership type.
- **Number of Memberships:** The total count of the number of Closed and Won Opportunities (Donations) defined as a membership record type.

Household Account Membership Fields

Household Accounts include the same fields as the Contact, as well as two additional fields. The primary difference between the Contact and Household Account fields is that Household Account fields show membership information in aggregate for all Household members.

▼ Membership Information			
Total Membership Amount	\$250.00	Last Membership Date	5/3/2016
Membership End Date	5/3/2017	Last Membership Amount	\$50.00
Last Membership Level	Gold	Last Membership Origin	New
Membership Join Date	4/13/2016	Number of Memberships	3
		Membership Span 🕒	1
		Membership Status 🕒	Current

The two additional fields on the Household Account are:

- **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 2017-2016 = 1)
- **Membership Status:** A formula field using this formula: If the Membership End Date is earlier than today, Salesforce looks to see if the end date is older than 31 days from today. If so, it will show Expired. If less than 31 days, it will show Grace Period. If the Membership End Date has no value, this field will be blank. If the Membership is still active, the value will be Current. **Note:** *The default Grace Period is 30 days. If you changed the Grace Period in NPSP Settings, the formula is adjusted accordingly.*

When do Membership Values Roll Up?

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

1. The **Membership** record type must be set in **NPSP Settings | Donations | Membership**.
2. For new Membership records, the following must be true:
 - **Amount** field must have a value (\$0 is an acceptable value)
 - **Opportunity Stage** must be a Closed/Won type (Posted, or some other user-defined stage value that has the Type set to Closed/Won)
3. For updates to existing membership records, one of the following must be true:
 - The **Stage** must change from an Open or Closed/Lost stage type to a Closed/Won stage type, OR
 - The **Amount** value must change, OR
 - The **Close Date** must change, OR
 - The **Account Name** value must change.



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