

**Author:** Joel Kristenson  
**Last Updated:** 2016-03-16

## Overview

This article walks through the steps to utilizing some of the big new changes that were released in 2016 for **selling/tracking memberships** using your **Trail Blazer** database.

It walks through the creation of a **membership ‘event’** to track yearly membership dues, creating membership levels to sell, and how the process works both online and manually.

The last section shows how to run **search queries** by membership information i.e. whose membership **expired**, who your current members are, etc.

 **Tip:** Use the **Ctrl+F** hot key to jump to different sections of this article (example: “**#1**”, “**#2**” or “**Related Resources**”).

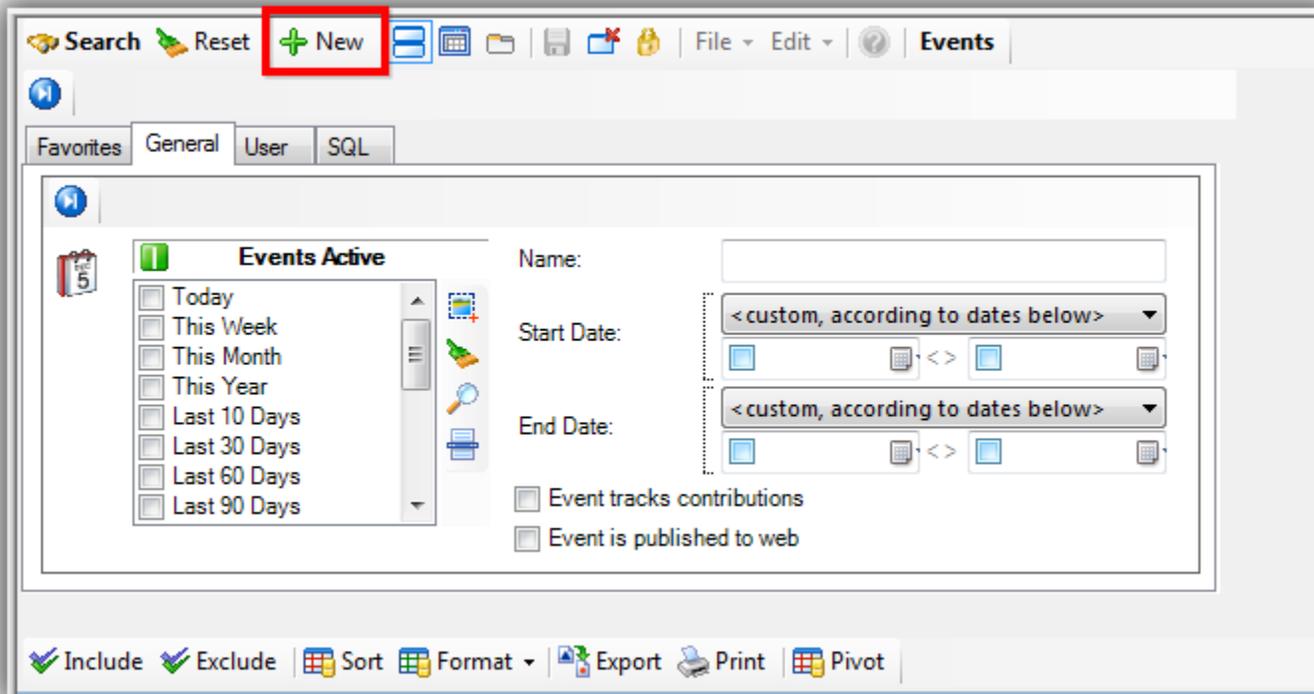
## **Outline**

- #1 – Creating a Membership ‘Event’ Record and Creating Memberships Levels to Sell
- #2 – Running Search Queries in the Contacts (*Donors*) List for Current & Lapsed Members
- #3 – Related Resources

## **#1 – Creating a Membership ‘Event’ Record and Creating Membership Levels to Sell**

Navigate to the **Events** list under the **Application Menu** > **Calendar/Tasks** > **Events**.

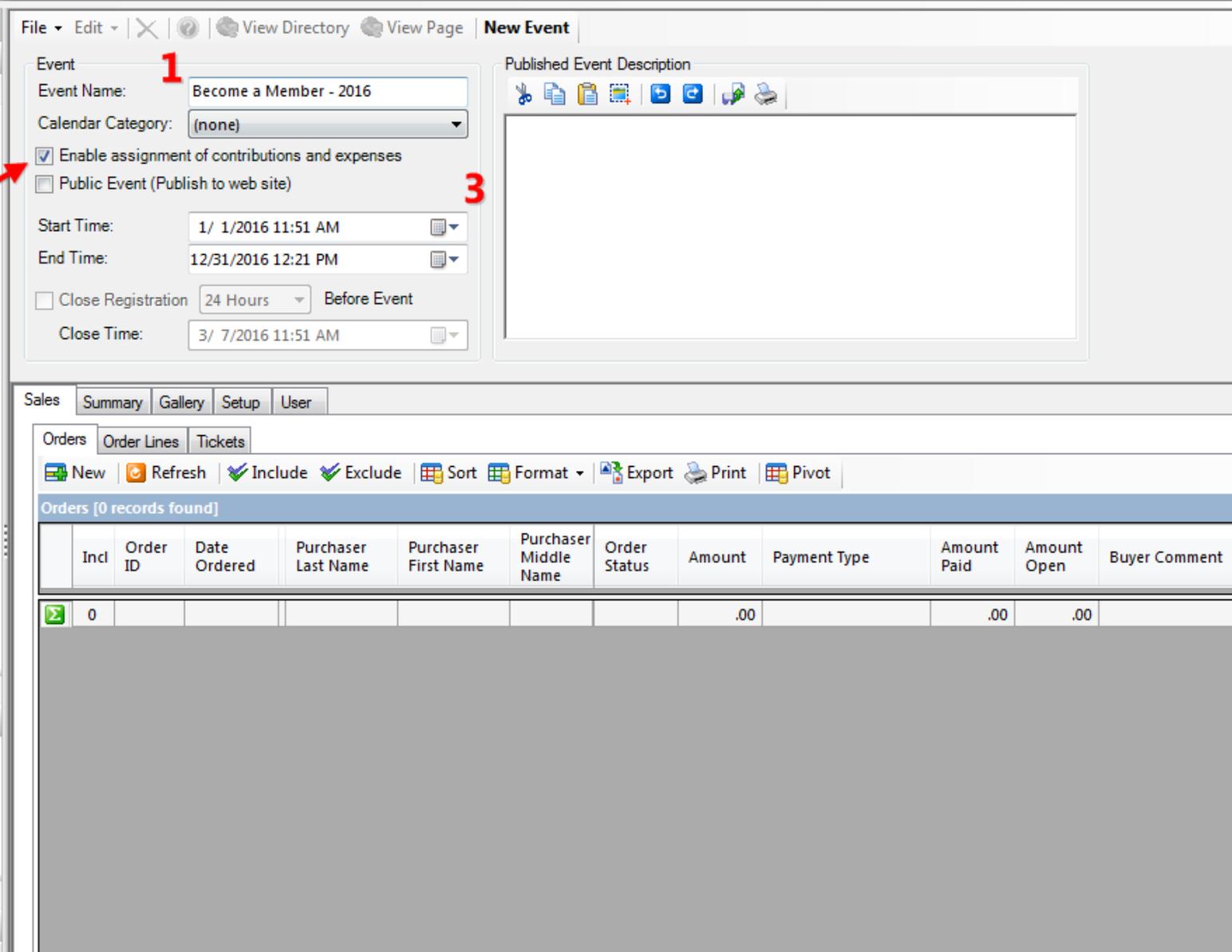
## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



Give the ‘event’ a **name**, check the box to ‘**Enable Assignment of Contributions and Expenses**’, set a **date-range**, and click [**Save**].

*In my example I called my event “**Become a Member - 2016**” and set a date range of **1/1/2016 – 12/31/2016**. You may find it easier to just create one single membership event those goes on forever with no end date, both ways work.*

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



The screenshot displays the TrailBlazer software interface. At the top, there is a menu bar with 'File', 'Edit', and 'New Event'. Below this, the 'Event' section contains several input fields and checkboxes. A red arrow labeled '2' points to the 'Enable assignment of contributions and expenses' checkbox, which is checked. A red number '1' is placed above the 'Event Name' field, which contains 'Become a Member - 2016'. A red number '3' is placed to the right of the 'Public Event (Publish to web site)' checkbox, which is unchecked. The 'Published Event Description' area is empty. Below the event form, there are tabs for 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. The 'Orders' tab is active, showing a table with columns for 'Incl', 'Order ID', 'Date Ordered', 'Purchaser Last Name', 'Purchaser First Name', 'Purchaser Middle Name', 'Order Status', 'Amount', 'Payment Type', 'Amount Paid', 'Amount Open', and 'Buyer Comment'. The table shows one record with an amount of .00. A toolbar above the table includes icons for 'New', 'Refresh', 'Include', 'Exclude', 'Sort', 'Format', 'Export', 'Print', and 'Pivot'.

File Edit View Directory View Page **New Event**

Event  
Event Name: **1** Become a Member - 2016  
Calendar Category: (none)  
 **2** Enable assignment of contributions and expenses  
 Public Event (Publish to web site) **3**  
Start Time: 1/ 1/2016 11:51 AM  
End Time: 12/31/2016 12:21 PM  
 Close Registration 24 Hours Before Event  
Close Time: 3/ 7/2016 11:51 AM

Published Event Description

Sales Summary Gallery Setup User

Orders Order Lines Tickets

New Refresh Include Exclude Sort Format Export Print Pivot

Orders [0 records found]

Incl	Order ID	Date Ordered	Purchaser Last Name	Purchaser First Name	Purchaser Middle Name	Order Status	Amount	Payment Type	Amount Paid	Amount Open	Buyer Comment
0							.00		.00	.00	

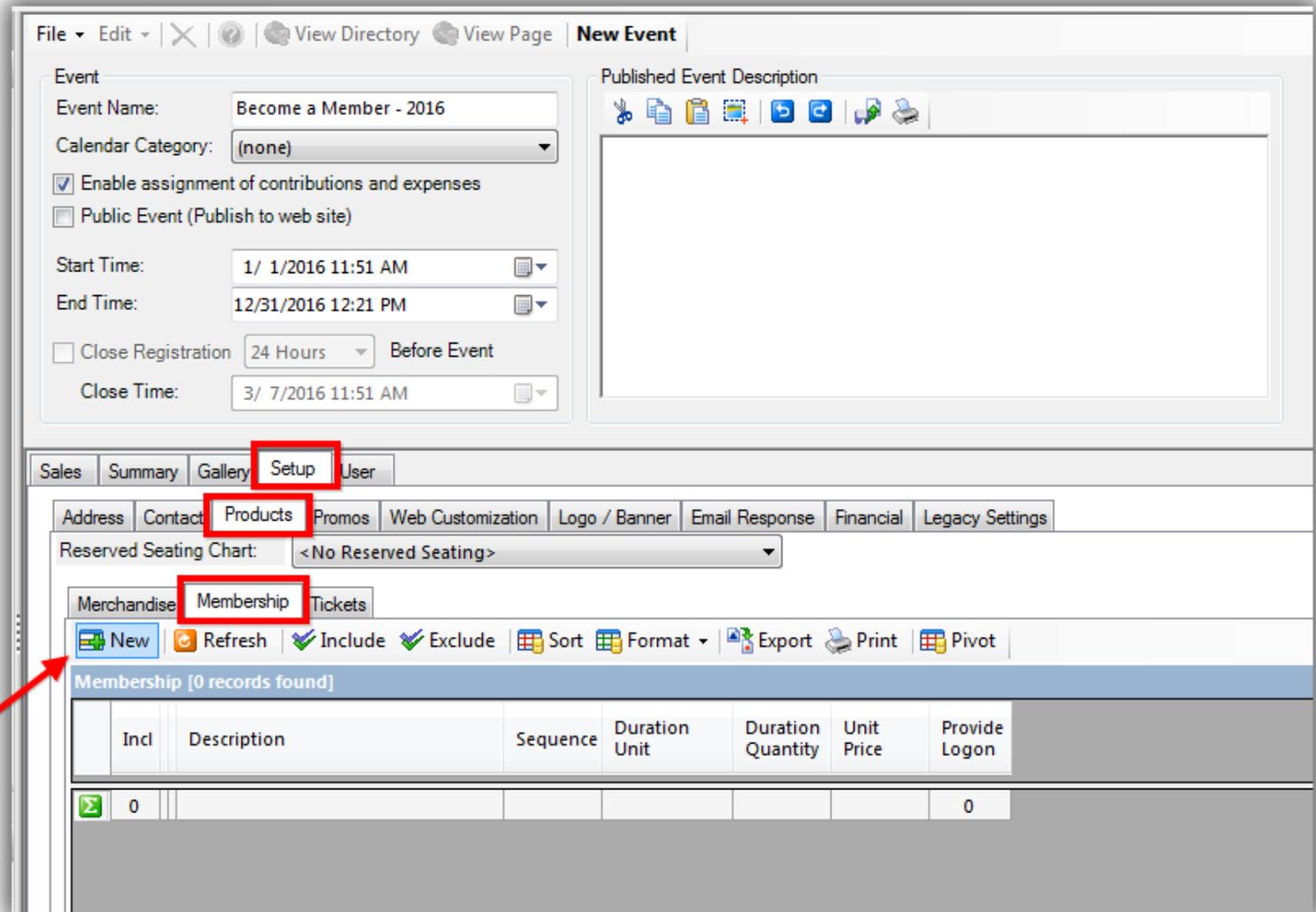
## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

**NOTE:** You’ll return to this screen later to finish ‘**publishing**’ the event to the web once all other setup steps are complete.

Navigate to **Setup > Products > Membership** and click the **[New]** button.

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



The screenshot shows the TrailBlazer software interface for creating a new membership level. The top navigation bar includes 'File', 'Edit', 'View Directory', 'View Page', and 'New Event'. The main content area is divided into two sections: 'Event' and 'Published Event Description'. The 'Event' section contains fields for 'Event Name' (Become a Member - 2016), 'Calendar Category' (none), 'Start Time' (1/ 1/2016 11:51 AM), 'End Time' (12/31/2016 12:21 PM), and 'Close Time' (3/ 7/2016 11:51 AM). There are also checkboxes for 'Enable assignment of contributions and expenses' and 'Public Event (Publish to web site)'. The 'Published Event Description' section is currently empty.

Below the event details, there are several tabs: 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. The 'Setup' tab is selected and highlighted with a red box. Under the 'Setup' tab, there are sub-tabs: 'Address', 'Contact', 'Products', 'Promos', 'Web Customization', 'Logo / Banner', 'Email Response', 'Financial', and 'Legacy Settings'. The 'Products' sub-tab is also highlighted with a red box. Below the sub-tabs, there is a 'Reserved Seating Chart' dropdown menu set to '< No Reserved Seating >'. Below that, there are three sub-tabs: 'Merchandise', 'Membership', and 'Tickets'. The 'Membership' sub-tab is highlighted with a red box. Below the sub-tabs, there is a toolbar with buttons for 'New', 'Refresh', 'Include', 'Exclude', 'Sort', 'Format', 'Export', 'Print', and 'Pivot'. The 'New' button is highlighted with a red box and a red arrow pointing to it. Below the toolbar, there is a table with the following columns: 'Incl', 'Description', 'Sequence', 'Duration Unit', 'Duration Quantity', 'Unit Price', and 'Provide Logon'. The table currently shows one row with a green plus icon in the 'Incl' column and the value '0' in the 'Provide Logon' column. The text 'Membership [0 records found]' is displayed above the table.

**Click [New] to begin creating new membership levels to sell.**

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

Enter all of the *required* information as well as any of the *optional* information that you want. *My example is below for an ‘Individual, 1 year membership, for \$75.00’.*

**IMPORTANT:** You **\*only** need to check the box for ‘**Provide Membership logon access**’ if you’re working with a development firm that is connecting Trail Blazer’s **API** to your online membership login portal.

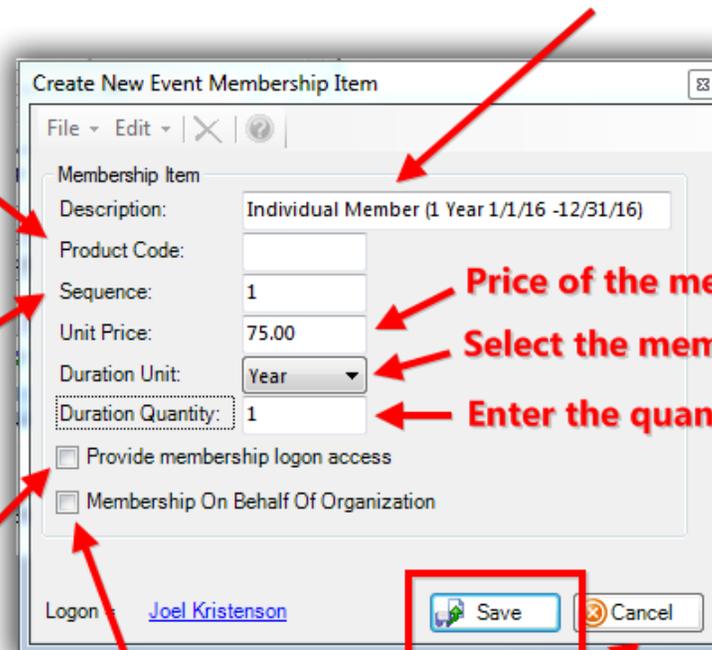
## Example Membership Item with Details

**\*Optional field, (rarely used). Enter a code here to help with further categorizing membership levels.**

**Create a name for your membership item.**

**Order in which items will display online.**

**\*ONLY check this if you work with a development firm who is integrating your member sign-in with Trail Blazer's API.**



**Price of the membership item.**

**Select the membership duration.**

**Enter the quantity (usually left at 1).**

**When you're finished, click [Save]. (You can always open the item again to make changes if necessary).**

**This \*option allows an organization (company) to purchase a membership for an individual.**

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

Repeat these steps until you’ve created all of your membership levels. *My examples are below.*

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

File Edit View Directory View Page **New Event**

Event  
 Event Name:   
 Calendar Category:   
 Enable assignment of contributions and expenses  
 Public Event (Publish to web site)  
 Start Time:   
 End Time:   
 Close Registration  Before Event  
 Close Time:

Published Event Description

Sales Summary Gallery Setup User

Address Contact Products Promos Web Customization Logo / Banner Email Response Financial Legacy Settings

Reserved Seating Chart:

Merchandise Membership Tickets

Include  Exclude

Membership [5 records found]

	Incl	Event Product ID	Product ID	Description	Sequence	Duration Unit	Duration Quantity	Unit Price	Provide Logon
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	61	50	<a href="#">Individual Member (1 Year 1/1/16 -12/31/16)</a>	1	Year	1	75.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	62	51	<a href="#">Company Membership (1 Year 1/1/16 -12/31/16)</a>	2	Year	1	175.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	63	52	<a href="#">Group Membership (Covers 4 People) (1 Year 1/1/16 -12/31/16)</a>	3	Year	1	300.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	64	53	<a href="#">Lifetime Membership (Indv) (No End Date)</a>	4	Year	100	5,000.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	65	54	<a href="#">Lifetime Membership (Co.) (No End Date)</a>	5	Year	100	10,000.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5								0

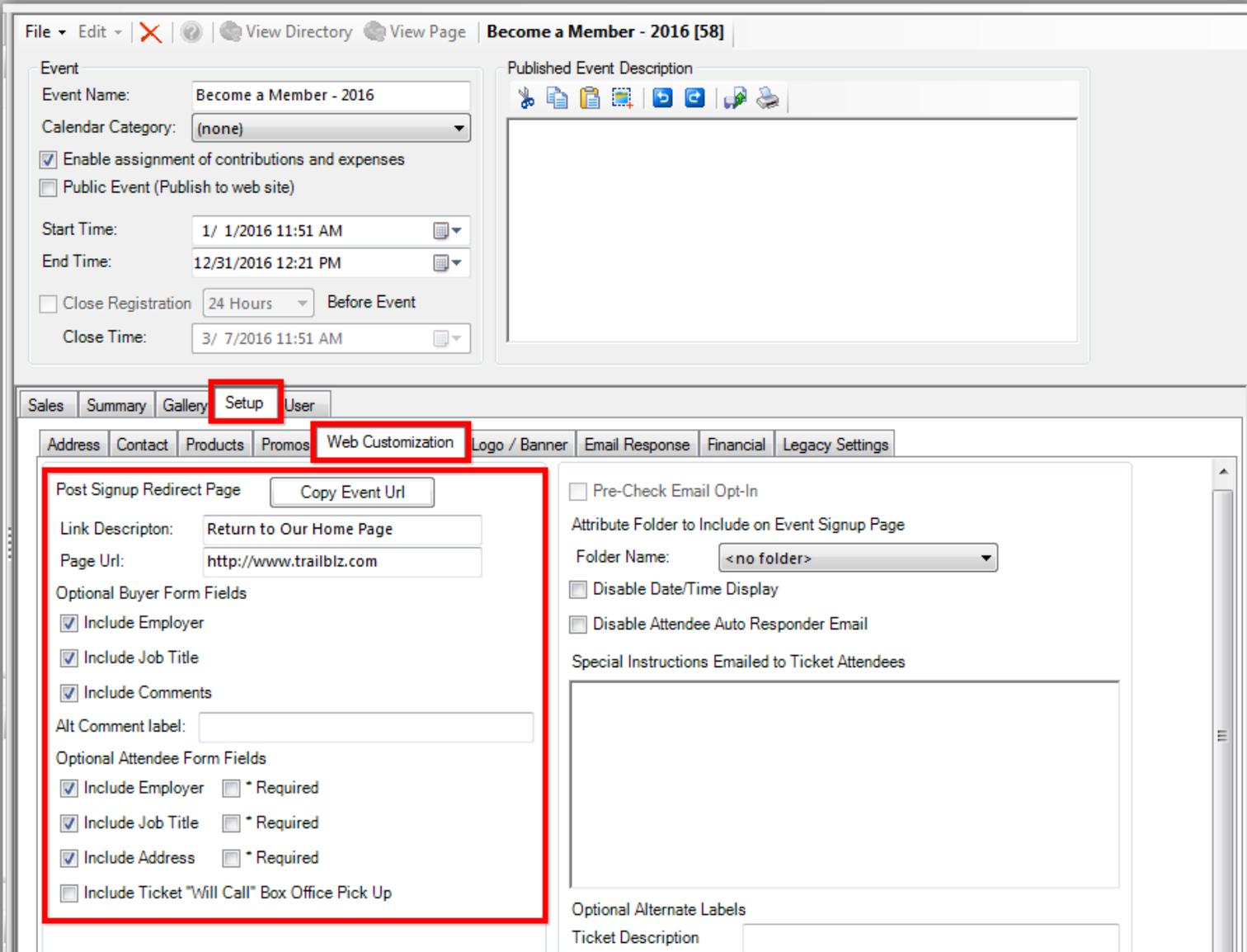
**My example membership levels for my 2016 membership event.**

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

Next navigate to the **Website Customization** tab where you can configure many other settings i.e. where to send your members to after they make a purchase, extra fields to collect, add [attribute checkboxes](#), etc. *My example is below where I turned a few optional fields on, and entered a post-redirect URL to send members to after they complete their purchase.*

## Optional settings you can configure under the 'Web Customization' tab.



The screenshot shows the TrailBlazer web interface for configuring an event. The event name is "Become a Member - 2016". The "Web Customization" tab is selected, and the "Post Signup Redirect Page" section is highlighted with a red box. This section includes a "Copy Event Url" button, a "Link Description" field with the value "Return to Our Home Page", and a "Page Url" field with the value "http://www.trailblz.com". Below these are sections for "Optional Buyer Form Fields" and "Optional Attendee Form Fields", each with several checked options like "Include Employer", "Include Job Title", and "Include Comments".

**Event Configuration:**

- Event Name: Become a Member - 2016
- Calendar Category: (none)
- Enable assignment of contributions and expenses
- Public Event (Publish to web site)
- Start Time: 1/ 1/2016 11:51 AM
- End Time: 12/31/2016 12:21 PM
- Close Registration: 24 Hours Before Event
- Close Time: 3/ 7/2016 11:51 AM

**Web Customization Settings:**

- Post Signup Redirect Page: Copy Event Url
- Link Description: Return to Our Home Page
- Page Url: http://www.trailblz.com
- Optional Buyer Form Fields:
  - Include Employer
  - Include Job Title
  - Include Comments
  - Alt Comment label: [empty]
- Optional Attendee Form Fields:
  - Include Employer  \* Required
  - Include Job Title  \* Required
  - Include Address  \* Required
  - Include Ticket "Will Call" Box Office Pick Up
- Pre-Check Email Opt-In
- Attribute Folder to Include on Event Signup Page:
  - Folder Name: <no folder>
  - Disable Date/Time Display
  - Disable Attendee Auto Responder Email
- Special Instructions Emailed to Ticket Attendees: [empty]
- Optional Alternate Labels: [empty]
- Ticket Description: [empty]

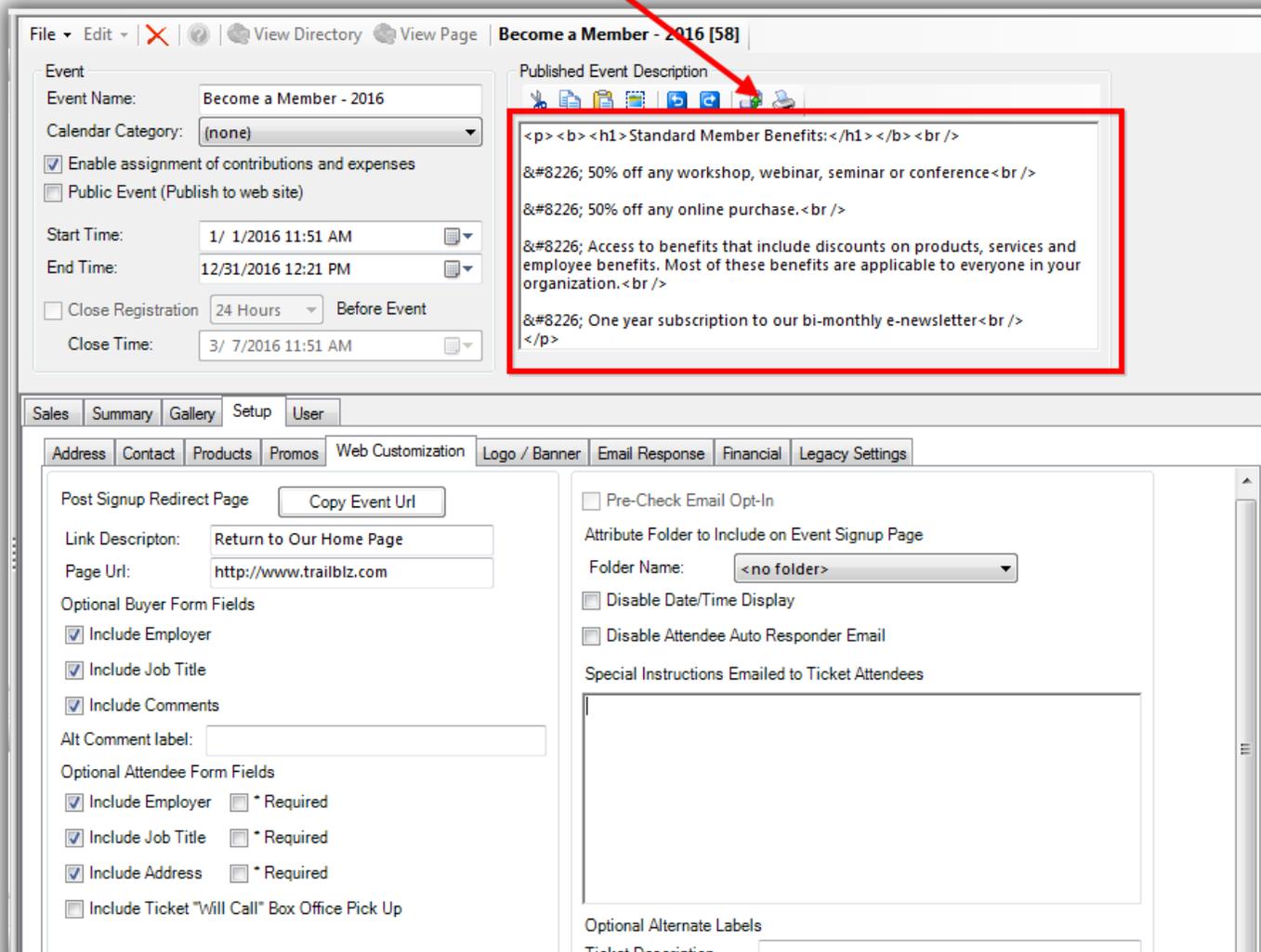
## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

Write a **description** for the event in the upper-right text box (ex: membership discounts, special offers, further instructions, etc.). *My example is below which utilizes a small amount of [html](#) and [css](#) to further style the way the description will display online.*

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

**Enter a description for your membership page e.g. what benefits your members will receive for becoming a member, as well as any other instructions they need. (You can \*optionally add html and css to style this further).**



The screenshot shows the TrailBlazer software interface for editing an event. The event name is "Become a Member - 2016". The "Published Event Description" field is highlighted with a red box and contains the following HTML code:

```
<p><b><h1>Standard Member Benefits:</h1></b><br />
&#8226; 50% off any workshop, webinar, seminar or conference.<br />
&#8226; 50% off any online purchase.<br />
&#8226; Access to benefits that include discounts on products, services and employee benefits. Most of these benefits are applicable to everyone in your organization.<br />
&#8226; One year subscription to our bi-monthly e-newsletter.<br />
</p>
```

The interface also shows various settings for the event, including start and end times, registration options, and post-signup redirect page settings.

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

 **Tip:** If you want to style your membership page further take a look at [this article](#).

Next, navigate to **Setup > Contact**, enter your **phone/email**, and check the box to ‘**Publish Contact Information**’. *My example is below, \*if the box to publish this info is greyed out you’ll need to **close, and re-open** the event record.*

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

File Edit X View Directory View Page **Become a Member - 2016 [58]**

**Event**  
Event Name:   
Calendar Category:   
 Enable assignment of contributions and expenses  
 Public Event (Publish to web site)  
Start Time:   
End Time:   
 Close Registration  Before Event  
Close Time:

**Published Event Description**

Sales Summary Gallery **Setup** User

Address **Contact** Products Promos Web Customization Logo / Banner Email Response Financial Legacy Settings

**Contact**  
 Publish Contact Information  
Organizer Name:   
Email:   
Phone:

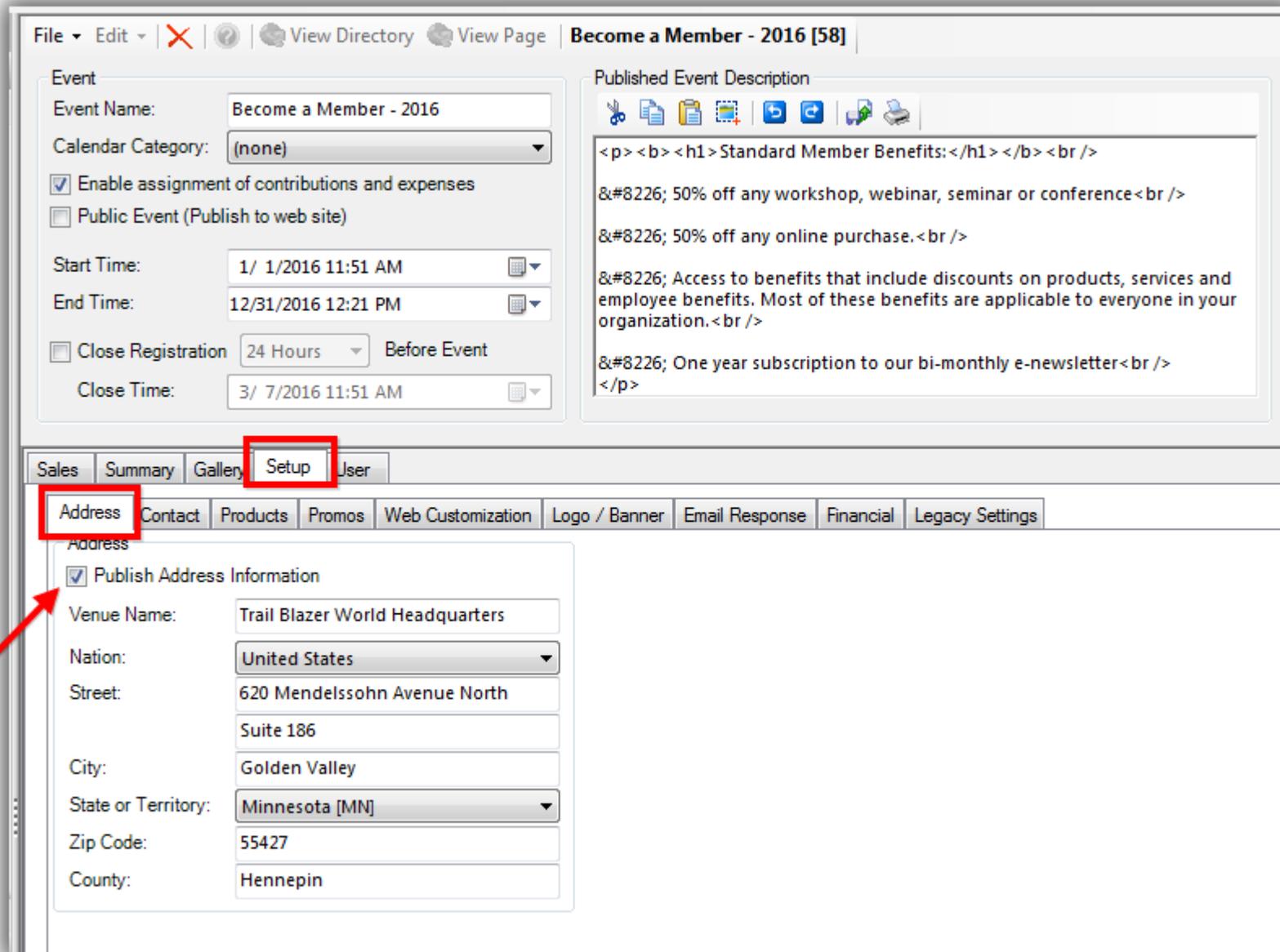
**3** **2**

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

\*If you want to display a map of your **address**, navigate to the **Address** tab, fill out your information, and check the box for **‘Publish Address Information’**.

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



The screenshot displays the TrailBlazer software interface for managing an event. The top navigation bar includes 'File', 'Edit', 'View Directory', 'View Page', and 'Become a Member - 2016 [58]'. The main content area is divided into two sections: 'Event' and 'Published Event Description'.

**Event Section:**

- Event Name: Become a Member - 2016
- Calendar Category: (none)
- Enable assignment of contributions and expenses
- Public Event (Publish to web site)
- Start Time: 1/ 1/2016 11:51 AM
- End Time: 12/31/2016 12:21 PM
- Close Registration: 24 Hours Before Event
- Close Time: 3/ 7/2016 11:51 AM

**Published Event Description Section:**

<p><b><h1>Standard Member Benefits:</h1></b><br />  
&#8226; 50% off any workshop, webinar, seminar or conference<br />  
&#8226; 50% off any online purchase.<br />  
&#8226; Access to benefits that include discounts on products, services and employee benefits. Most of these benefits are applicable to everyone in your organization.<br />  
&#8226; One year subscription to our bi-monthly e-newsletter<br /></p>

The interface includes a navigation menu with tabs for 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. The 'Setup' tab is highlighted with a red box. Below the navigation menu, there are sub-tabs for 'Address', 'Contact', 'Products', 'Promos', 'Web Customization', 'Logo / Banner', 'Email Response', 'Financial', and 'Legacy Settings'. The 'Address' sub-tab is also highlighted with a red box. A red arrow points to the 'Publish Address Information' checkbox, which is checked. The address information is as follows:

**Address Information:**

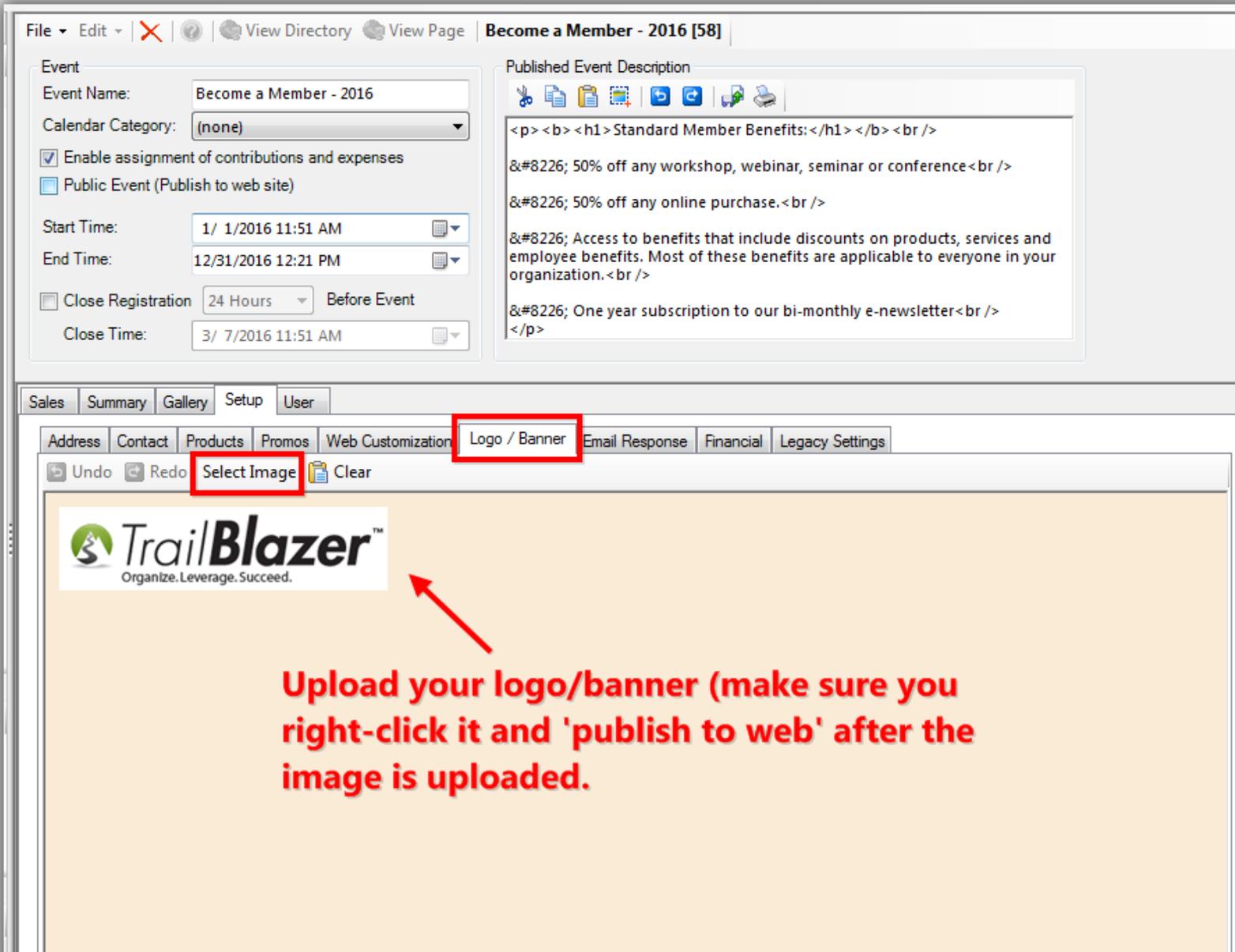
- Publish Address Information
- Venue Name: Trail Blazer World Headquarters
- Nation: United States
- Street: 620 Mendelssohn Avenue North  
Suite 186
- City: Golden Valley
- State or Territory: Minnesota [MN]
- Zip Code: 55427
- County: Hennepin

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

\*Optionally add a **logo/banner** under the **Logo / Banner** tab. *In my example I uploaded the **Trail Blazer** logo, make sure the image is [published to the web](#) during upload.*

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



File Edit X View Directory View Page **Become a Member - 2016 [58]**

Event

Event Name:

Calendar Category:

Enable assignment of contributions and expenses

Public Event (Publish to web site)

Start Time:

End Time:

Close Registration  Before Event

Close Time:

Published Event Description

**Standard Member Benefits:**

- 50% off any workshop, webinar, seminar or conference
- 50% off any online purchase.
- Access to benefits that include discounts on products, services and employee benefits. Most of these benefits are applicable to everyone in your organization.
- One year subscription to our bi-monthly e-newsletter

Sales Summary Gallery Setup User

Address Contact Products Promos Web Customization **Logo / Banner** Email Response Financial Legacy Settings

Undo Redo **Select Image** Clear



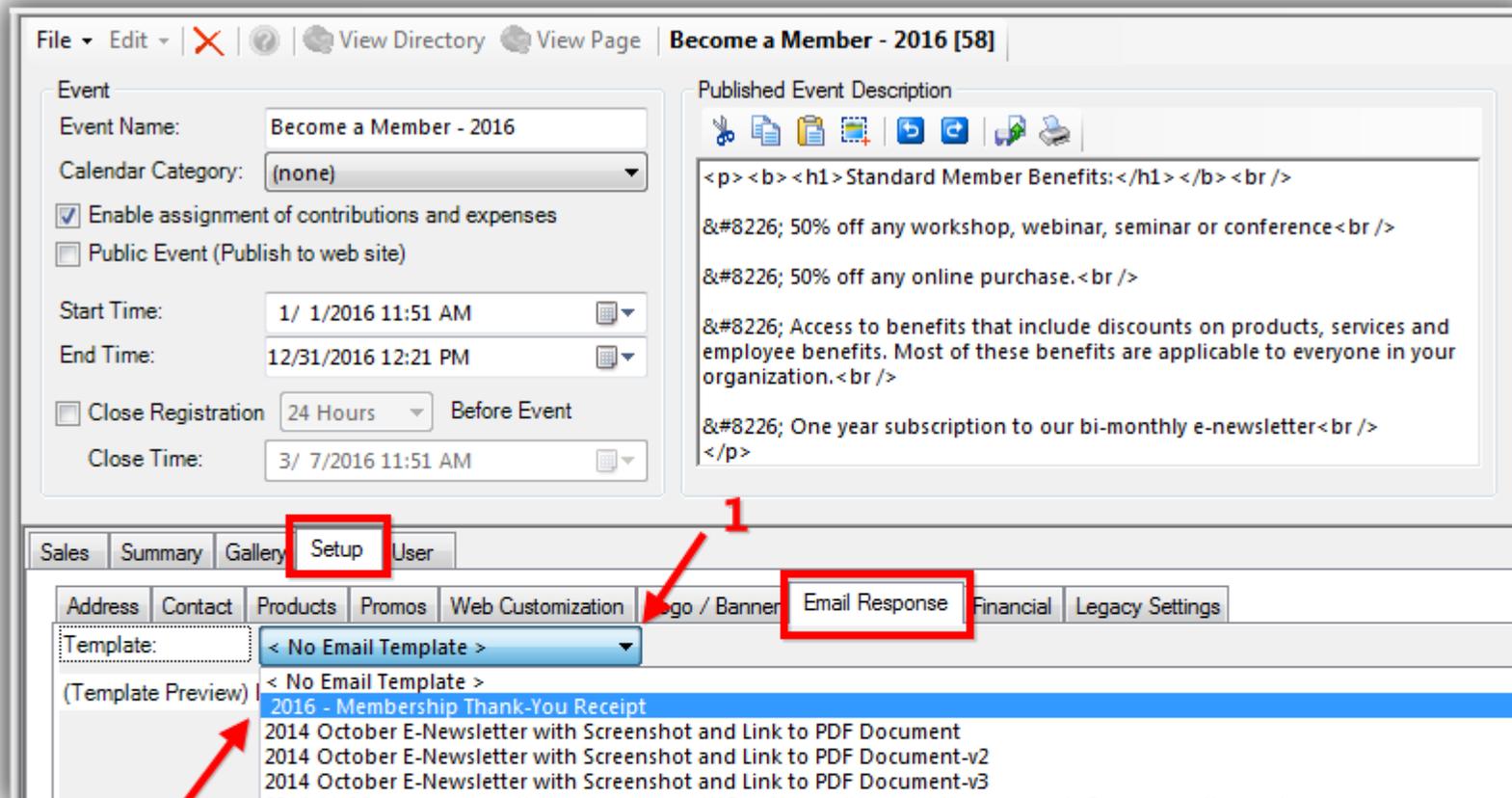
**Upload your logo/banner (make sure you right-click it and 'publish to web' after the image is uploaded.)**

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

\*If you want to create a different **email response** than the *automatically generated receipt*, you can select the template that you’ve [previously created](#). The benefit of creating your own custom template is that you can thank people specifically for becoming a member, and there are also **membership specific merge fields** that can be utilized. *In my example I selected a pre-built template called ‘2016 – Membership Thank-You Receipt’ as shown below.*

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



**2. Select your own email template to use as an auto-responder if you don't want to use the generic receipt that get's emailed out.**

**(You can choose a 'Standard Trail Blazer Template' from within the email**

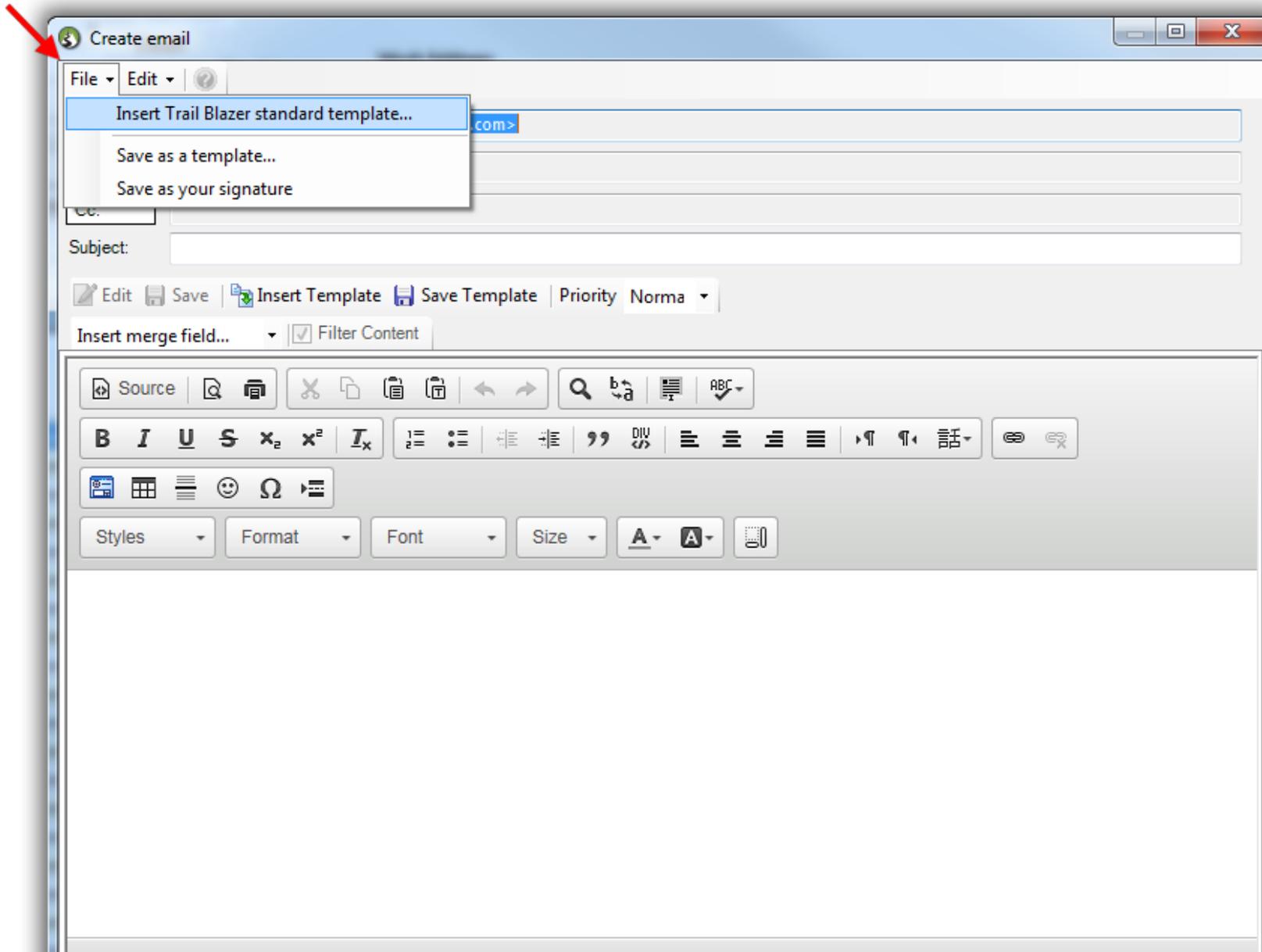
## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

 **Tip:** You can find a similar one to use as a starting point by inserting one of our ‘**Standard Trail Blazer Templates**’ from within the email composer, *\*if* you want to do this you’ll open the composer, and select **File > Insert Standard Trail Blazer Template > Select the Membership** one:

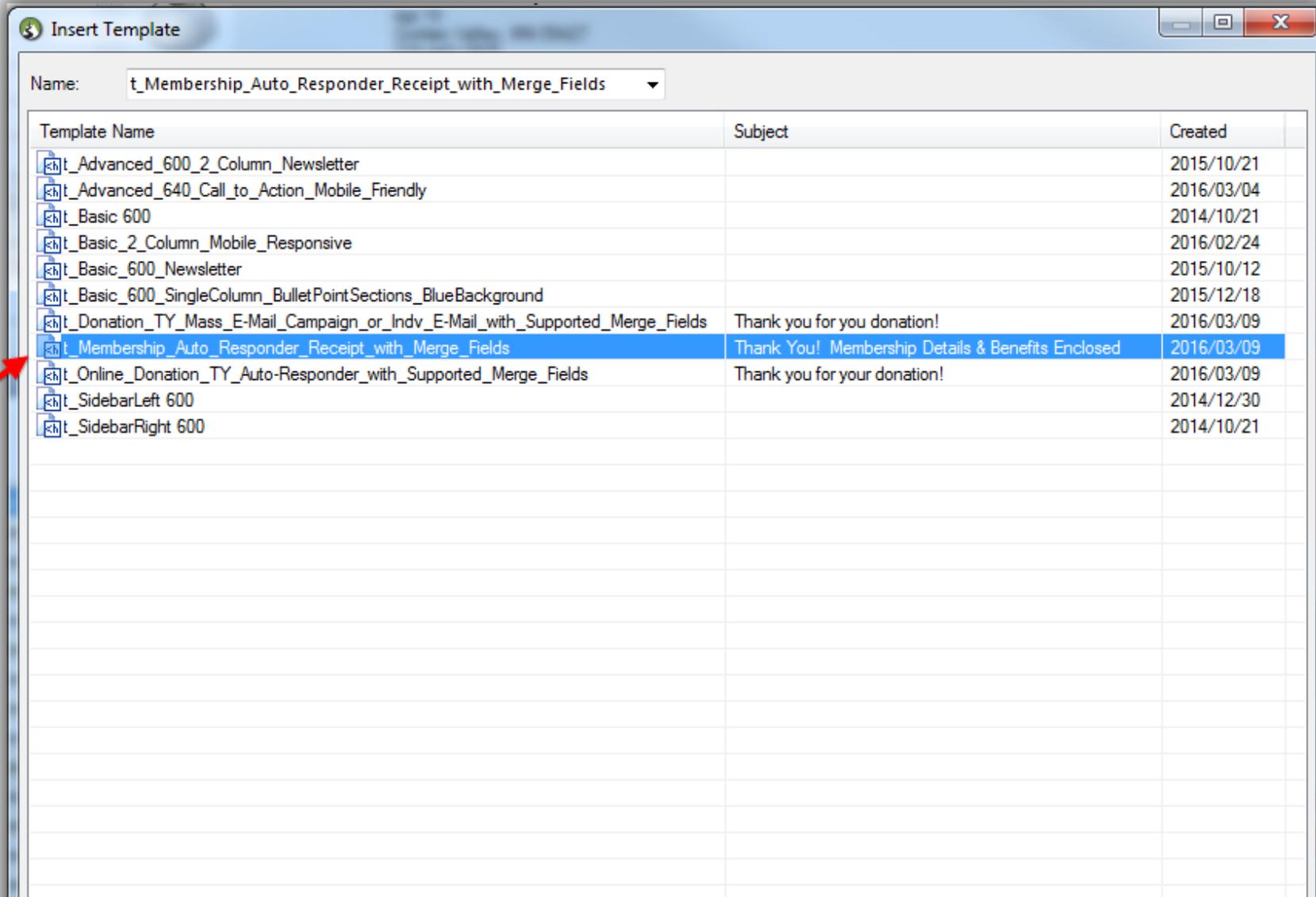
Img 1 – Select Standard Templates

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



Img 2 – Choose the Membership Template

## Get started with a standard membership template.



The screenshot shows a window titled "Insert Template" with a dropdown menu set to "t\_Membership\_Auto\_Responder\_Receipt\_with\_Merge\_Fields". Below the dropdown is a table with three columns: "Template Name", "Subject", and "Created". The table lists several templates, with the one "t\_Membership\_Auto\_Responder\_Receipt\_with\_Merge\_Fields" highlighted in blue. A red arrow points to this row.

Template Name	Subject	Created
t_Advanced_600_2_Column_Newsletter		2015/10/21
t_Advanced_640_Call_to_Action_Mobile_Friendly		2016/03/04
t_Basic 600		2014/10/21
t_Basic_2_Column_Mobile_Responsive		2016/02/24
t_Basic_600_Newsletter		2015/10/12
t_Basic_600_SingleColumn_BulletPointSections_BlueBackground		2015/12/18
t_Donation_TY_Mass_E-Mail_Campaign_or_Indv_E-Mail_with_Supported_Merge_Fields	Thank you for you donation!	2016/03/09
<b>t_Membership_Auto_Responder_Receipt_with_Merge_Fields</b>	<b>Thank You! Membership Details &amp; Benefits Enclosed</b>	<b>2016/03/09</b>
t_Online_Donation_TY_Auto-Responder_with_Supported_Merge_Fields	Thank you for your donation!	2016/03/09
t_SidebarLeft 600		2014/12/30
t_SidebarRight 600		2014/10/21

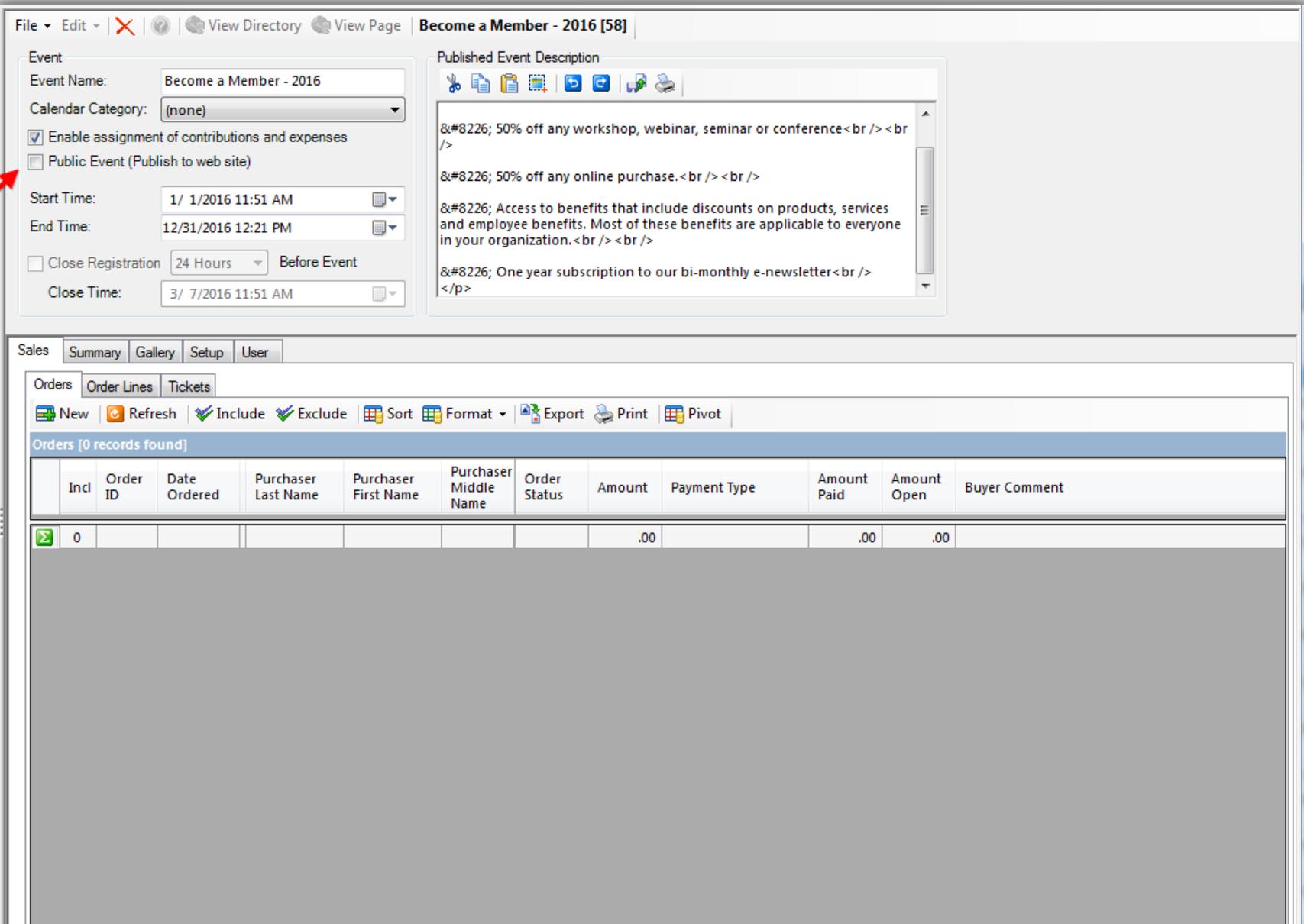
## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

Once you’re finished creating the membership ‘event’ click **[Save]** in the bottom-right, check the box in the upper-left to make the event **public**, and click **[OK]** when you get the pop-up warning. *Shown in two images below.*

Img 1 of 2 – Save the Event Record, and Check the Box to Make it Public

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

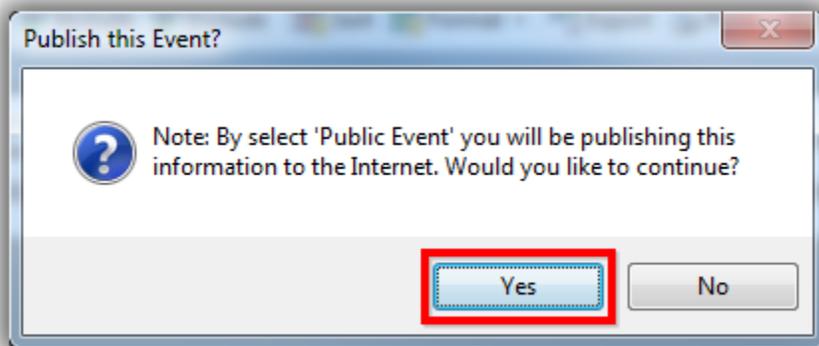


The screenshot displays the TrailBlazer software interface. At the top, a menu bar includes 'File', 'Edit', and 'View Directory'. The main window title is 'Become a Member - 2016 [58]'. The interface is divided into several sections:

- Event Section:** Contains fields for 'Event Name' (Become a Member - 2016), 'Calendar Category' (none), and checkboxes for 'Enable assignment of contributions and expenses' (checked) and 'Public Event (Publish to web site)'. A red arrow with the number '2' points to the 'Public Event' checkbox. Below these are 'Start Time' (1/ 1/2016 11:51 AM), 'End Time' (12/31/2016 12:21 PM), and 'Close Registration' (24 Hours Before Event) options.
- Published Event Description:** A text area containing HTML-formatted text:
 

```
&#8226; 50% off any workshop, webinar, seminar or conference.<br /><br />
      &#8226; 50% off any online purchase.<br /><br />
      &#8226; Access to benefits that include discounts on products, services and employee benefits. Most of these benefits are applicable to everyone in your organization.<br /><br />
      &#8226; One year subscription to our bi-monthly e-newsletter.<br /></p>
```
- Sales Section:** Includes tabs for 'Summary', 'Gallery', 'Setup', and 'User'. Below these are sub-tabs for 'Orders', 'Order Lines', and 'Tickets'. A toolbar contains icons for 'New', 'Refresh', 'Include', 'Exclude', 'Sort', 'Format', 'Export', 'Print', and 'Pivot'.
- Orders Table:** A table with the header 'Orders [0 records found]'. The table has columns: 'Incl', 'Order ID', 'Date Ordered', 'Purchaser Last Name', 'Purchaser First Name', 'Purchaser Middle Name', 'Order Status', 'Amount', 'Payment Type', 'Amount Paid', 'Amount Open', and 'Buyer Comment'. The first row shows a value of '0' in the 'Incl' column and '.00' in the 'Amount', 'Amount Paid', and 'Amount Open' columns.

Img 2 of 2 – Click [Yes] to Finish Publishing your Membership Event



Next you'll want to **preview** what your membership event looks like, click [**Save**] one more time in the bottom-right, and then click the [**View Page**] button at the top.

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

**Click this at the top to view your membership 'event'.**



File Edit View Directory **View Page** Become a Member - 2016 [58]

**Event**  
 Event Name: Become a Member - 2016  
 Calendar Category: (none)  
 Enable assignment of contributions and expenses  
 Public Event (Publish to web site)  
 Start Time: 1/ 1/2016 11:51 AM  
 End Time: 12/31/2016 12:21 PM  
 Close Registration 24 Hours Before Event  
 Close Time: 3/ 7/2016 11:51 AM

**Published Event Description**

&#8226; 50% off any workshop, webinar, seminar or conference  
 &#8226; 50% off any online purchase.  
 &#8226; Access to benefits that include discounts on products, services and employee benefits. Most of these benefits are applicable to everyone in your organization.  
 &#8226; One year subscription to our bi-monthly e-newsletter

Sales Summary Gallery Setup User

Orders Order Lines Tickets

New Refresh Include Exclude Sort Format Export Print Pivot

Orders [0 records found]

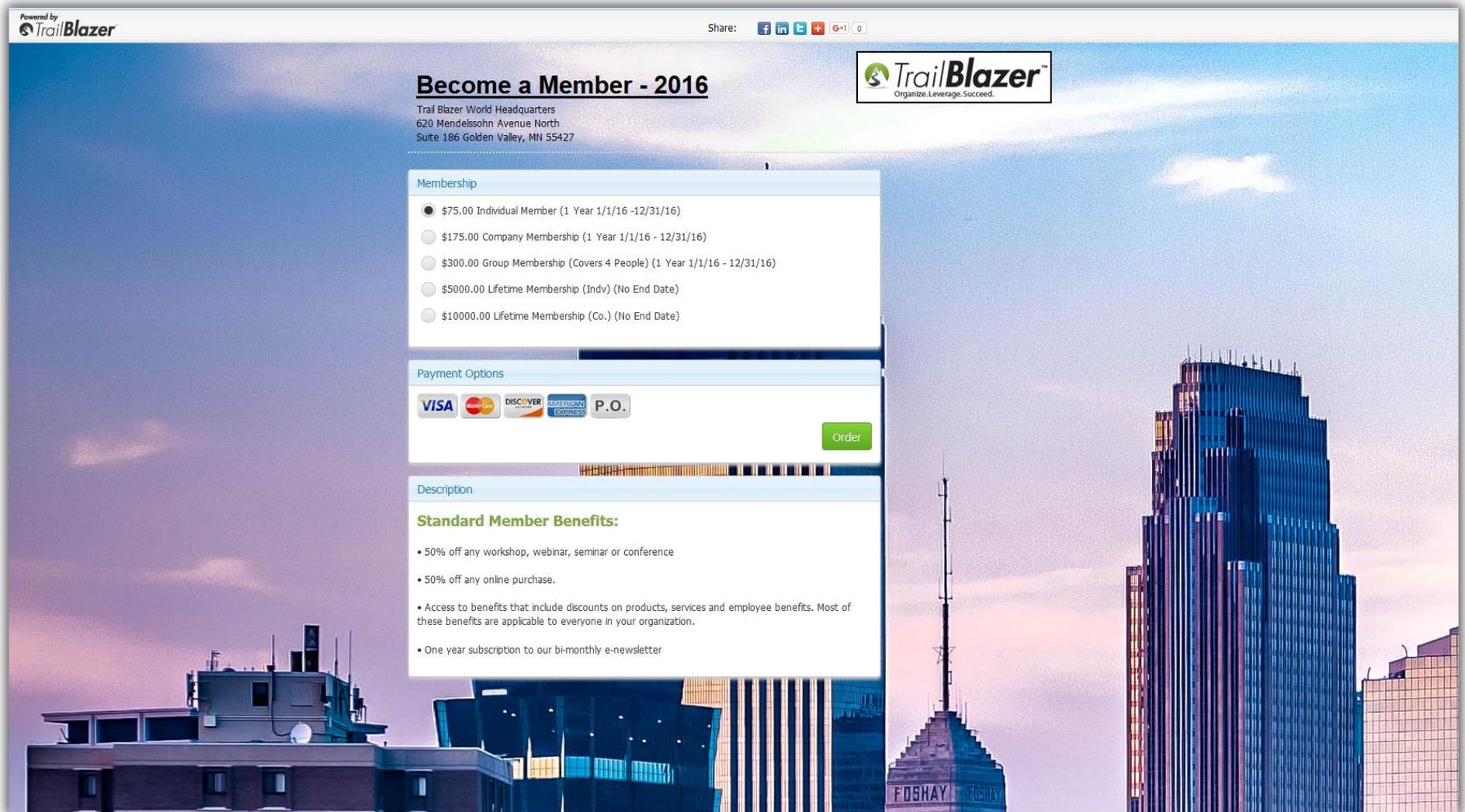
Incl	Order ID	Date Ordered	Purchaser Last Name	Purchaser First Name	Purchaser Middle Name	Order Status	Amount	Payment Type	Amount Paid	Amount Open	Buyer Comment
0							.00		.00	.00	

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

Here’s an *example* of how mine looks online.

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



The screenshot shows a web page titled "Become a Member - 2016" powered by TrailBlazer. The page features a navigation bar with social media share buttons (Facebook, LinkedIn, Twitter, Google+, and Email) and a TrailBlazer logo. The main content area is divided into three sections: "Membership", "Payment Options", and "Description".

**Membership**

- \$75.00 Individual Member (1 Year 1/1/16 -12/31/16)
- \$175.00 Company Membership (1 Year 1/1/16 - 12/31/16)
- \$300.00 Group Membership (Covers 4 People) (1 Year 1/1/16 - 12/31/16)
- \$5000.00 Lifetime Membership (Indv) (No End Date)
- \$10000.00 Lifetime Membership (Co.) (No End Date)

**Payment Options**

VISA   MasterCard   DISCOVER   AMERICAN EXPRESS   P.O.

**Order**

**Description**

**Standard Member Benefits:**

- 50% off any workshop, webinar, seminar or conference
- 50% off any online purchase.
- Access to benefits that include discounts on products, services and employee benefits. Most of these benefits are applicable to everyone in your organization.
- One year subscription to our bi-monthly e-newsletter

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

Yours could look quite different depending upon how you set it up i.e. one *single* membership event that runs forever, OR (*like I did in this tutorial*), a separate membership event for each year.

It’s good to run a test membership purchase before going live with this and linking it to your website. Here’s an *example* of how the purchase works, and how the receipt & email acknowledgement look.

Img 1 of 4 – Top-Half of Checkout Screen for Purchasing a Single Membership (*on a desktop monitor*)

## Top-Half of the checkout screen.

Powered by 

Share: [f](#) [in](#) [t](#) [+](#) [G+](#) [0](#)

  
 Organize. Leverage. Succeed.

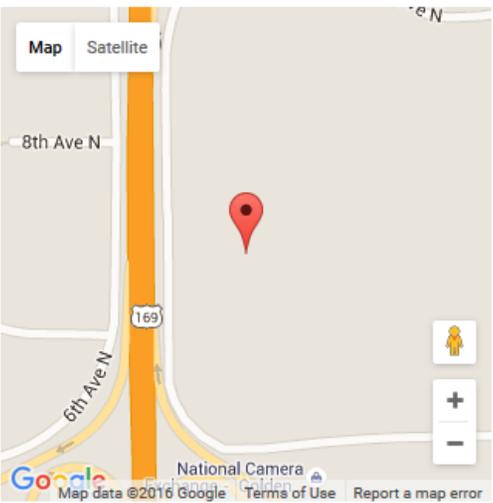
Trail Blazer World Headquarters  
620 Mendelssohn Avenue North  
Suite 186 Golden Valley, MN 55427

---

**Order Summary** **Order details.**

DESCRIPTION	PRICE	QTY	TOTAL
INDIVIDUAL MEMBER (1 YEAR 1/1/16 -12/31/16)	\$75.00	1	\$75.00
			<b>TOTAL DUE \$75.00</b>

**Where**



Trail Blazer World Headquarters  
620 Mendelssohn Avenue North  
Suite 186  
Golden Valley, MN 55427

[Add to my Calendar](#)

Have you registered for a *Demo Nonprofit - Joel* event before? [click here](#) to login.

**Registration Information**

**Buyer Information**

\* First Name

\* Last Name

Phone

\* Email

Yes, I want to receive future email updates.

\* Employer

\* Occupation

\* Job Title

**Organizer**

Img 2 of 4 – Bottom-Half of Checkout Screen for Purchasing a Single Membership (*on a desktop monitor*)

## Bottom-half of the checkout screen.

Powered by  Share:     

Phone: 218-370-1064

\* Email: jkristenson@trailblz.com

Yes, I want to receive future email updates.

\* Employer: Trail Blazer Campaign Services, LLC

\* Occupation: Professional Dishwasher

\* Job Title: Director of Professional Dishwashers

Comment: Thanks for the membership option I can't wait for all the benefits! Keep up the amazing work!

**Payment Options**

**Billing Information**

\* Address: 9110 Golden Valley Rd  
Apt 10

\* City: Golden Valley

\* State: Minnesota

\* Zip Code: 55427

**Payment Information**

Payment Type: Paid Over the Phone by Credit Card

Please enter the code you see here: 

**Organizer**

Trail Blazer Campaign Services, LLC

866-909-8700

support@trailblz.com

Trail Blazer World Headquarters  
620 Mendelsohn Avenue North  
Suite 186  
Golden Valley, MN 55427

Add to my Calendar

**\*Optionally you can add other payment options besides paying with plastic.**

Img 3 of 4 – Receipt Details after making a Purchase (redirect page)

## Redirect page after purchasing a membership, details will display for printing.

Powered by 

Return to: [Return to Our Home Page](#) 

**\*If you put in a redirect link during the setup of the membership you can lead your member wherever you want at this point e.g. your website homepage.**

Your Invoice

Thank you for your order. Below is your confirmation. Please keep a copy for your records.

Your Customer Number is: 12796  
Your Order Number is: 00000032  
Your Order Date is: Thursday, March 10, 2016 3:26 PM

Your order for Become a Member - 2016 is complete!

620 Mendelssohn Avenue North  
Suite 186  
Golden Valley, MN 55427

**Order details.** 

Item	Name	Unit	Qty	Total
50	Individual Member (1 Year 1/1/16 -12/31/16) Membership 03/10/2016 to 03/09/2017	\$75.00	1	\$75.00
Subtotal				\$75.00

Print Receipt 

**Default [Print] button.**

Img 4 of 4 – Auto-responder Thank-You E-Mail w/Receipt Details (*this is if you decided to use a different email response than the default response, covered in the previous steps above*)

**E-Mail auto-responder with membership details (zoom=90%).**

Your Logo Goes Here

**CALL US**  
**1-866-909-8700**

**MEMBERSHIP CONFIRMATION RECEIPT**

Hello Joel,

Thank you for your interest in becoming a member of Your Organization Name Goes Here!

A contact will be in touch with you shortly to introduce you to our organization and help you understand all the advantages of becoming a member. If you have any questions or concerns, please call Your Organization Name Goes Here at 1-866-909-8700 for assistance.

**ACCOUNT SUMMARY**

Name: Joel Kristenson  
Organization:  
Membership Type: Individual Member (1 Year 1/1/16 -12/31/16)  
Membership Length: 1 year  
Annual Renewal: March 09, 2017

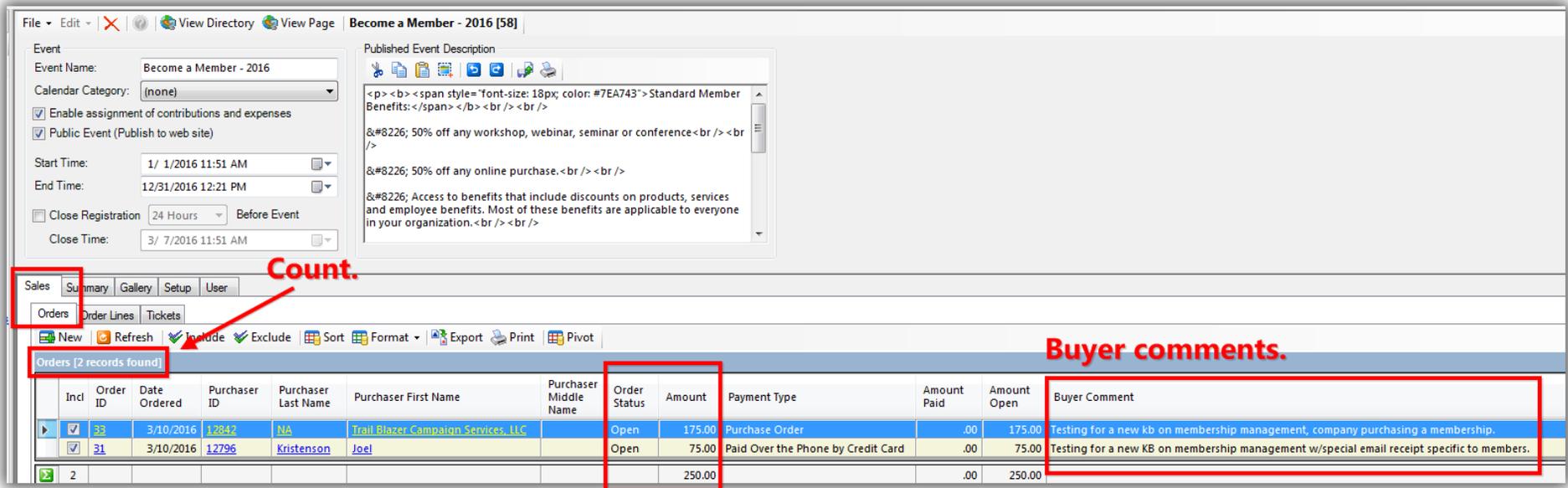
**BILLING INFORMATION**

Address: 9110 Golden Valley Rd, Golden Valley, MN 55427  
Phone Number: 218-370-1064  
Email: jkristenson@trailblz.com  
Payment Amount: \$75.00  
Payment Date: March 10, 2016  
Confirmation #: 32

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

As the data gets collected you can view the orders, order lines, etc. from within the membership ‘event’ record. *Example below.*

**Track memberships as they come in from within your membership ‘event’ record.**



The screenshot shows the 'Become a Member - 2016' event record. The 'Orders' tab is active, displaying a table with 2 records found. The table columns include: Incl, Order ID, Date Ordered, Purchaser ID, Purchaser Last Name, Purchaser First Name, Purchaser Middle Name, Order Status, Amount, Payment Type, Amount Paid, Amount Open, and Buyer Comment.

Incl	Order ID	Date Ordered	Purchaser ID	Purchaser Last Name	Purchaser First Name	Purchaser Middle Name	Order Status	Amount	Payment Type	Amount Paid	Amount Open	Buyer Comment
<input checked="" type="checkbox"/>	33	3/10/2016	12842	NA	Trail Blazer Campaign Services, LLC		Open	175.00	Purchase Order	.00	175.00	Testing for a new kb on membership management, company purchasing a membership.
<input checked="" type="checkbox"/>	31	3/10/2016	12796	Kristenson	Joel		Open	75.00	Paid Over the Phone by Credit Card	.00	75.00	Testing for a new KB on membership management w/special email receipt specific to members.
2								250.00		.00	250.00	

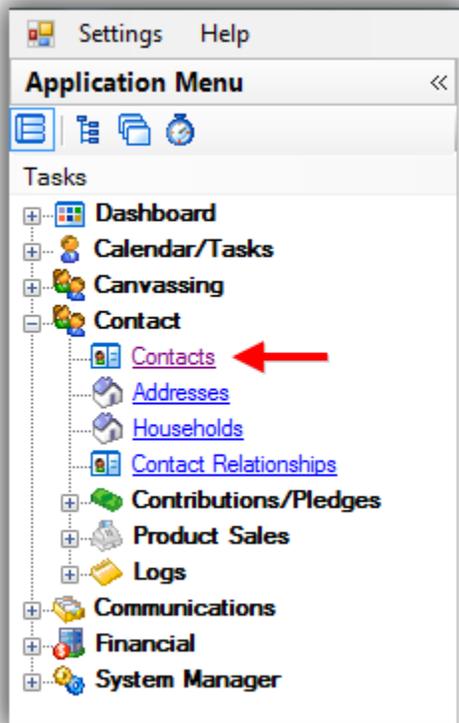
**Order status.**

## **#2 – Running Search Queries in the Contacts (*Donors*) List for Current & Lapsed Members**

Navigate to the **Contacts** (*Donors*) list under the **Application Menu**.

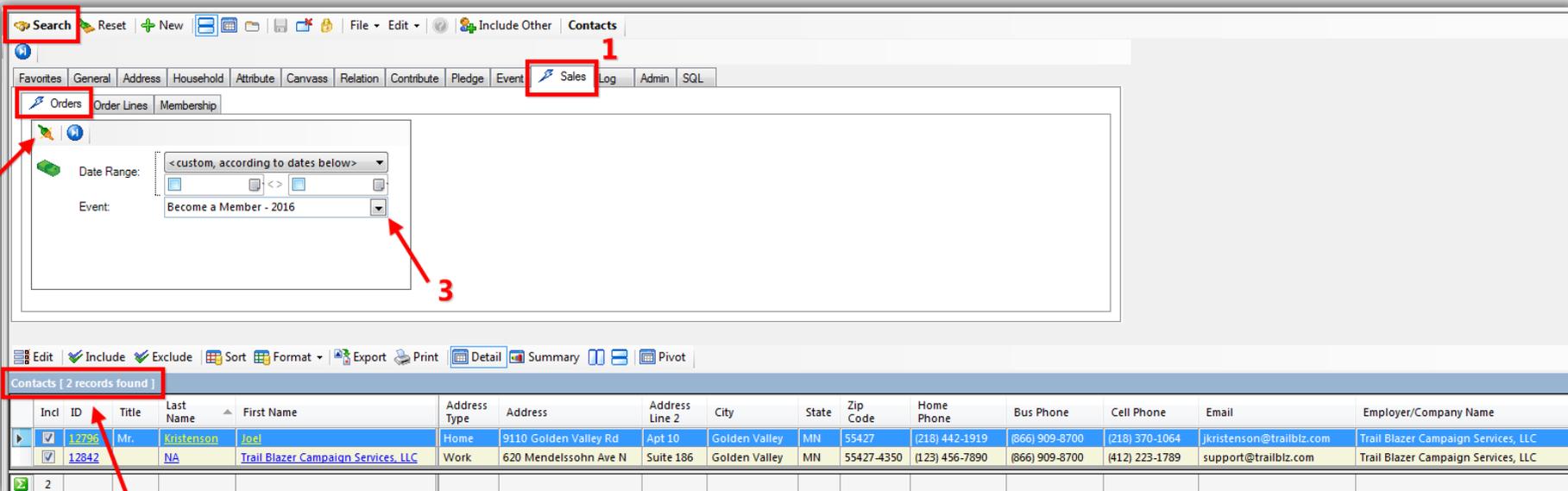
# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---



Click on the **Sales** tab > **Orders** sub-tab > **Plug** it in > Select your '**Membership Event**' > Click **[Search]**. *In my example it produced 2 members so for or my 2016 membership event.*

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



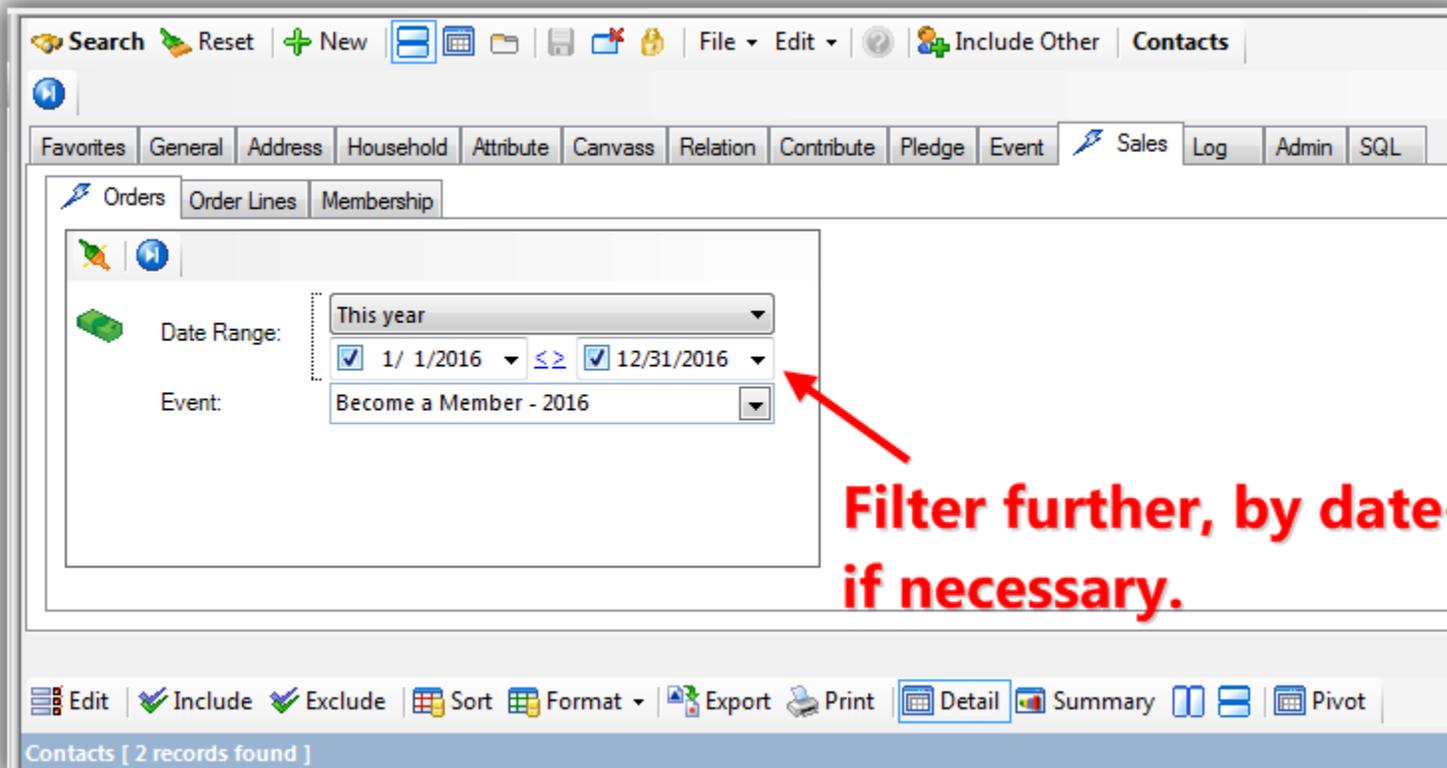
The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, and Include Other. Below this is a sub-menu with Favorites, General, Address, Household, Attribute, Canvass, Relation, Contribute, Pledge, Event, Sales, Log, Admin, and SQL. The 'Sales' option is highlighted with a red box and labeled '1'. Below the sub-menu, there are tabs for Orders, Order Lines, and Membership. The 'Orders' tab is active, and a search filter is applied to the 'Event' field, set to 'Become a Member - 2016'. This filter is highlighted with a red box and labeled '3'. The 'Date Range' is set to '<custom, according to dates below>'. A red arrow labeled '2' points to the search filter area. At the bottom, a table shows the search results, with a red box around the header 'Contacts [ 2 records found ]' and a red arrow labeled '4' pointing to the table. The table has columns for Incl, ID, Title, Last Name, First Name, Address Type, Address, Address Line 2, City, State, Zip Code, Home Phone, Bus Phone, Cell Phone, Email, and Employer/Company Name. Two records are listed: one for Mr. Kristenson, Joel, and another for Trail Blazer Campaign Services, LLC.

**Results.**

Incl	ID	Title	Last Name	First Name	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone	Bus Phone	Cell Phone	Email	Employer/Company Name
<input checked="" type="checkbox"/>	12796	Mr.	Kristenson	Joel	Home	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(218) 442-1919	(866) 909-8700	(218) 370-1064	jkristenson@trailblz.com	Trail Blazer Campaign Services, LLC
<input checked="" type="checkbox"/>	12842	NA	Trail Blazer Campaign Services, LLC		Work	620 Mendelssohn Ave N	Suite 186	Golden Valley	MN	55427-4350	(123) 456-7890	(866) 909-8700	(412) 223-1789	support@trailblz.com	Trail Blazer Campaign Services, LLC

You can also filter this further by entering a **date range**. This can be very useful if you have a ‘single’ running membership event instead of doing what I did and split each membership year into its own event.

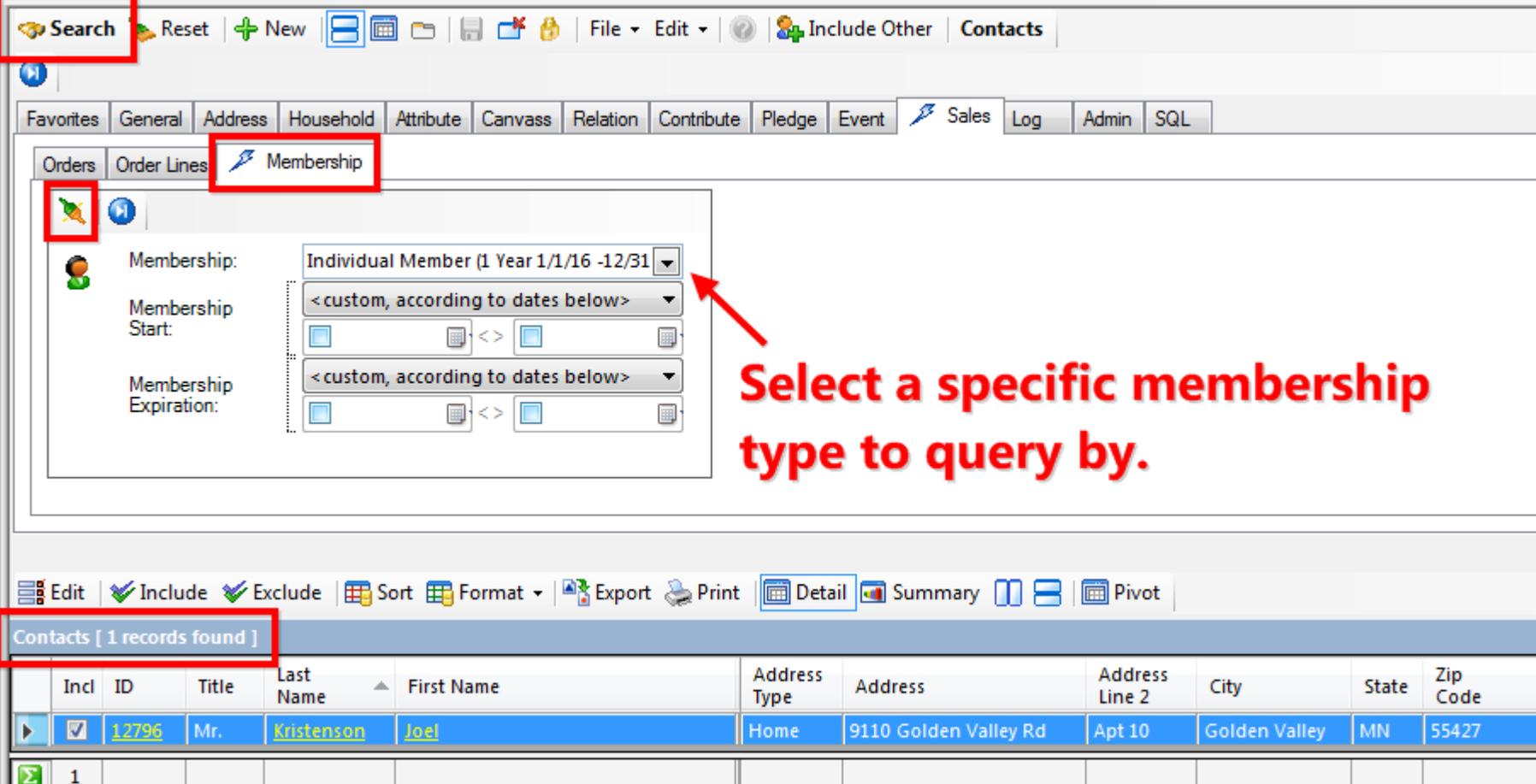
# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



**Filter further, by date-range, if necessary.**

If you want to search by a specific ‘Membership Type’ you can select that from the **Membership** sub-tab. *In my example I queried by individual (1 year) memberships which returned a single record.*

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



The screenshot shows the TrailBlazer software interface. At the top, there is a search bar with a magnifying glass icon, highlighted by a red box. Below it are various tabs: Favorites, General, Address, Household, Attribute, Canvass, Relation, Contribute, Pledge, Event, Sales, Log, Admin, and SQL. The 'Membership' tab is selected and highlighted by a red box. In the 'Membership' section, there are three dropdown menus: 'Membership' (set to 'Individual Member (1 Year 1/1/16 -12/31)'), 'Membership Start', and 'Membership Expiration'. A red arrow points to the 'Membership' dropdown with the text 'Select a specific membership type to query by.' Below the filters, there is a toolbar with options like Edit, Include, Exclude, Sort, Format, Export, Print, Detail, Summary, and Pivot. At the bottom, a table shows search results for 'Contacts [ 1 records found ]'. The table has columns for Incl, ID, Title, Last Name, First Name, Address Type, Address, Address Line 2, City, State, and Zip Code. One record is shown for ID 12796, Mr. Kristenson Joel, with address 9110 Golden Valley Rd, Apt 10, Golden Valley, MN 55427.

Incl	ID	Title	Last Name	First Name	Address Type	Address	Address Line 2	City	State	Zip Code
<input checked="" type="checkbox"/>	12796	Mr.	Kristenson	Joel	Home	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

You can filter it specifically by membership start dates, end dates under this same area. *My example is below where I looked for members who have expired prior to todays (3/11/2016) date which returned 4 results.*

## Example search query for members who have expired prior to 'today's' date.

2

Search Reset + New [Icons] File Edit [Icons] Include Other Contacts

Favorites General Address Household Attribute Canvass Relation Contribute Pledge Event Sales Log Admin SQL

Orders Order Lines Membership

Membership: <ignore>

Membership Start: <custom, according to dates below>

Membership Expiration: <custom, according to dates below> 3/14/2016

Edit Include Exclude Sort Format Export Print Detail Summary Pivot

Contacts [ 4 records found ]

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone	Email
<input checked="" type="checkbox"/>	868	Dimicco	Gloria		Home	2711 6th St NW		Willmar	CT	06500	(320) 235-8126	Gloria@Dimicco.com
<input checked="" type="checkbox"/>	1936	Galentine	Tom		Home	2956 County 120 Rd NE	Apt 68	Stewartville	CT	06500	(507) 533-8426	Tom@Galentine.com
<input checked="" type="checkbox"/>	869	Sachdeva	Marion		Home	2711 6th St NW		Willmar	CT	06500	(320) 235-8126	Marion@Sachdeva.com
<input checked="" type="checkbox"/>	8457	Uecker	Lynn	Scott	Home	1340 Evergreen Pl		Mayer	MN	55360	(952) 237-8029	

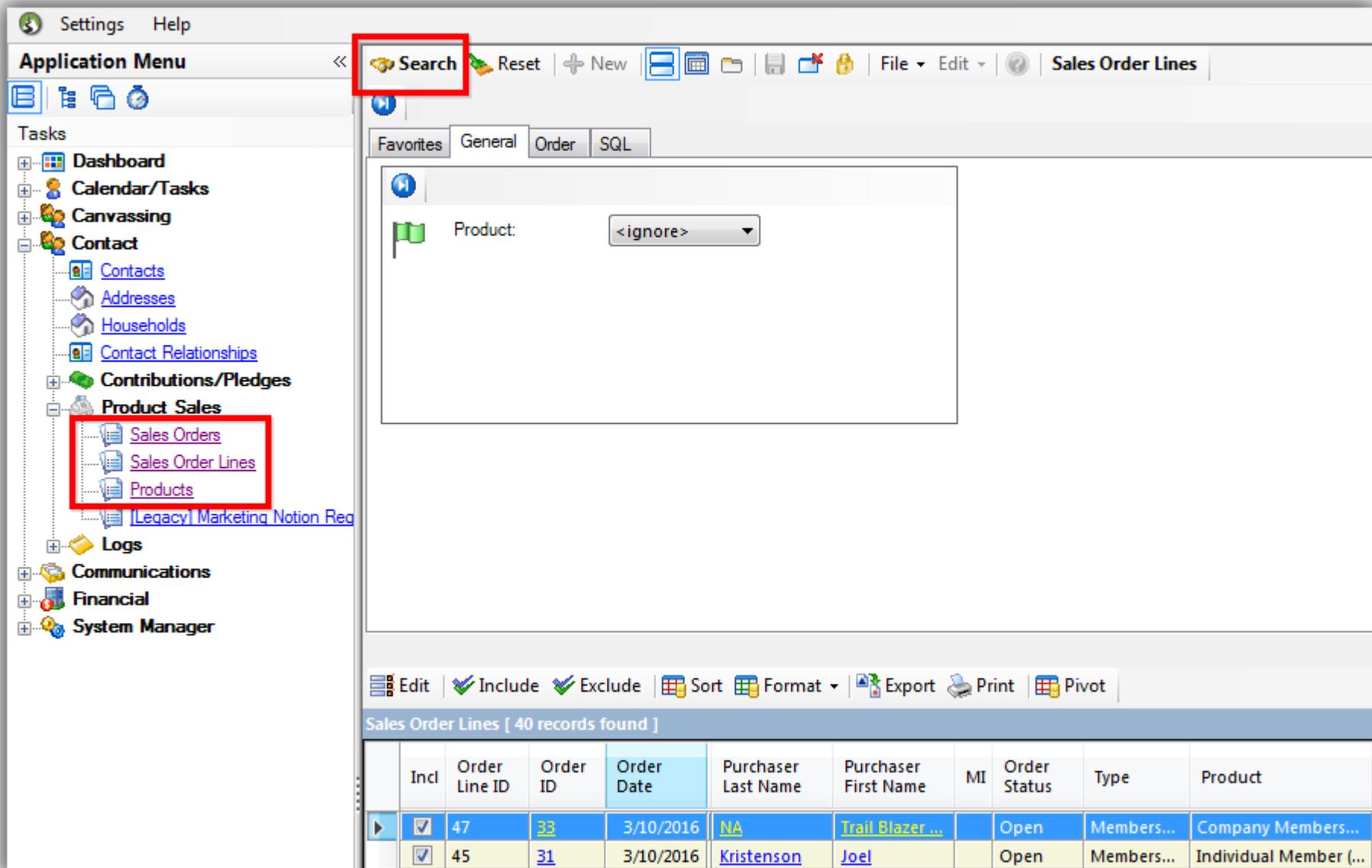
4

## Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

---

There really is a multitude of ways to look at this information as a report. It ultimately boils down to personal preference and what works most efficiently for your organization. Another common area to run these reports is in the **Sales** lists under the **Application Menu**:

# Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)



**Application Menu** << **Search** Reset + New [Icons] File Edit Sales Order Lines

**Tasks**

- Dashboard
- Calendar/Tasks
- Canvassing
- Contact
  - Contacts
  - Addresses
  - Households
  - Contact Relationships
- Contributions/Pledges
- Product Sales
  - Sales Orders**
  - Sales Order Lines**
  - Products
  - [Legacy] Marketing Notion Req
- Logs
- Communications
- Financial
- System Manager

**Sales Order Lines** [ 40 records found ]

	Incl	Order Line ID	Order ID	Order Date	Purchaser Last Name	Purchaser First Name	MI	Order Status	Type	Product
	<input checked="" type="checkbox"/>	47	<a href="#">33</a>	3/10/2016	NA	<a href="#">Trail Blazer ...</a>		Open	Members...	Company Members...
	<input checked="" type="checkbox"/>	45	<a href="#">31</a>	3/10/2016	<a href="#">Kristenson</a>	<a href="#">Joel</a>		Open	Members...	Individual Member (...)

When you run these reports it’s possible you will want to add or remove certain columns of data from the results, this will be handled via [formatting](#).



**Trail Blazer™**

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

## **#3 – Related Resources**

**Article:** [Save and Load a Lybunt Contribution Query as a Favorite](#)

**Article:** [How to Print Name Badges for Event Registrants – Using Avery 5392 Name Badge Paper](#)

**Article:** [How to Print or Re-Print Event Tickets and Event Order Receipts from your Database](#)

**Article:** [How to Style your Event Pages – 4 Example Mock Events – Sample CSS Code with Descriptions](#)

**Article:** [Purchase Orders](#)

**Article:** [Events 2014 – Part I](#)

**Article:** [Events 2014 – Part II](#)

**Article:** [Saved Searches – Favorites](#)

**Article:** [SQL Wildcards](#)

**Article:** [Creating and Saving Default Formats for Reporting with the Grid](#)

**Article:** [Save and Load a Search Query as a Favorite](#)

**Video:** [Thank you’s using mass email](#)

**Video:** [Orders Manual entry and payment](#)

**Video:** [Events – pay for an event online](#)

**Video:** [Scheduled Emails](#)

**Video:** [Setting People up to Receive Mass Email Drafts](#)

## Trail Blazer Live Support

📞 **Phone:** 1-866-909-8700

✉️ **Email:** [support@trailblz.com](mailto:support@trailblz.com)

📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

🐦 **Twitter:** <https://twitter.com/trailblazersoft>

*\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

*[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.*

*\* After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

*\* This service is included in your contract.*