

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

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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.

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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**”).

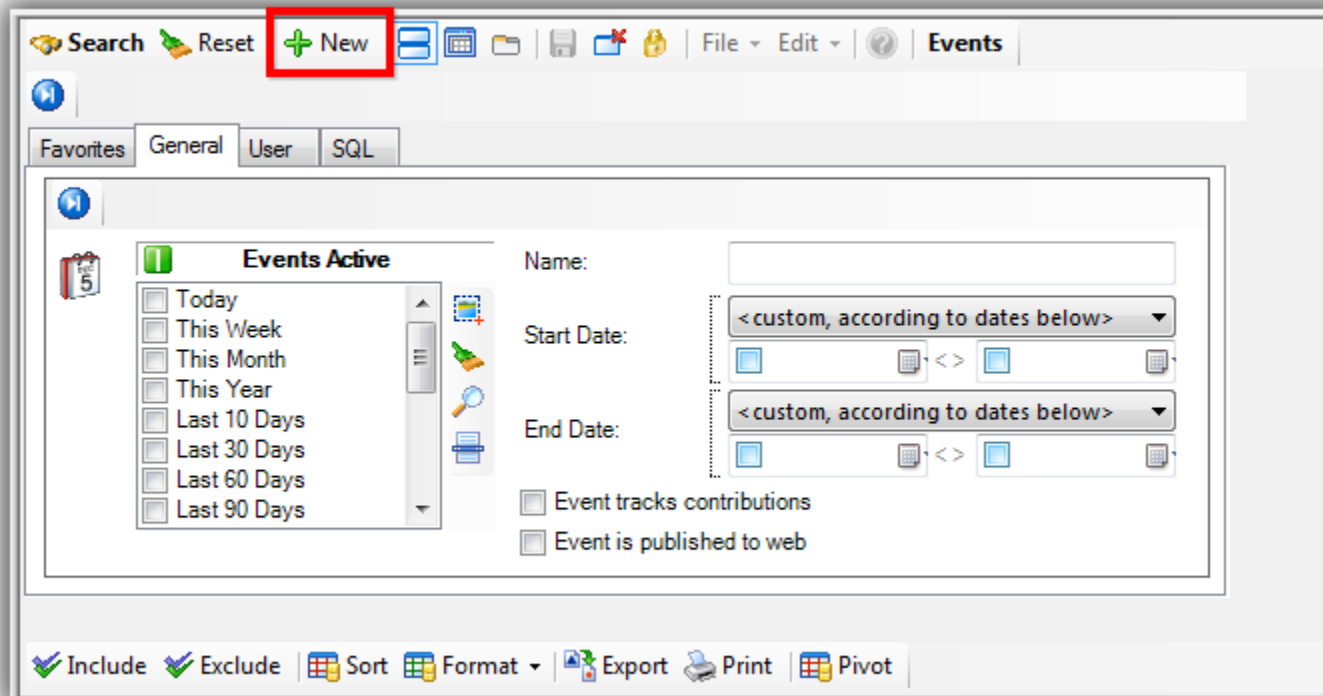
Outline

- #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**.

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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.*

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

Event

Event Name: **1** Become a Member - 2016

Calendar Category: (none)

☒ Enable assignment of contributions and expenses **3**

☐ 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

2

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
Σ 0							.00		.00	.00	

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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.

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File ▾ **Edit** ▾ | **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**

Membership [0 records found]

Incl	Description	Sequence	Duration Unit	Duration Quantity	Unit Price	Provide Logon
Σ	0					0

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

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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.

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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.**

Membership Item

Description: Individual Member (1 Year 1/1/16 -12/31/16)

Product Code:

Sequence: 1

Unit Price: 75.00

Duration Unit: Year

Duration Quantity: 1

☐ Provide membership login access

☐ Membership On Behalf Of Organization

Logon: Joel Kristenson

Save Cancel

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.

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

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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

New Refresh Include Exclude Sort Format Export Print Pivot

Membership [5 records found]

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

My example membership levels for my 2016 membership event.

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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.*

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

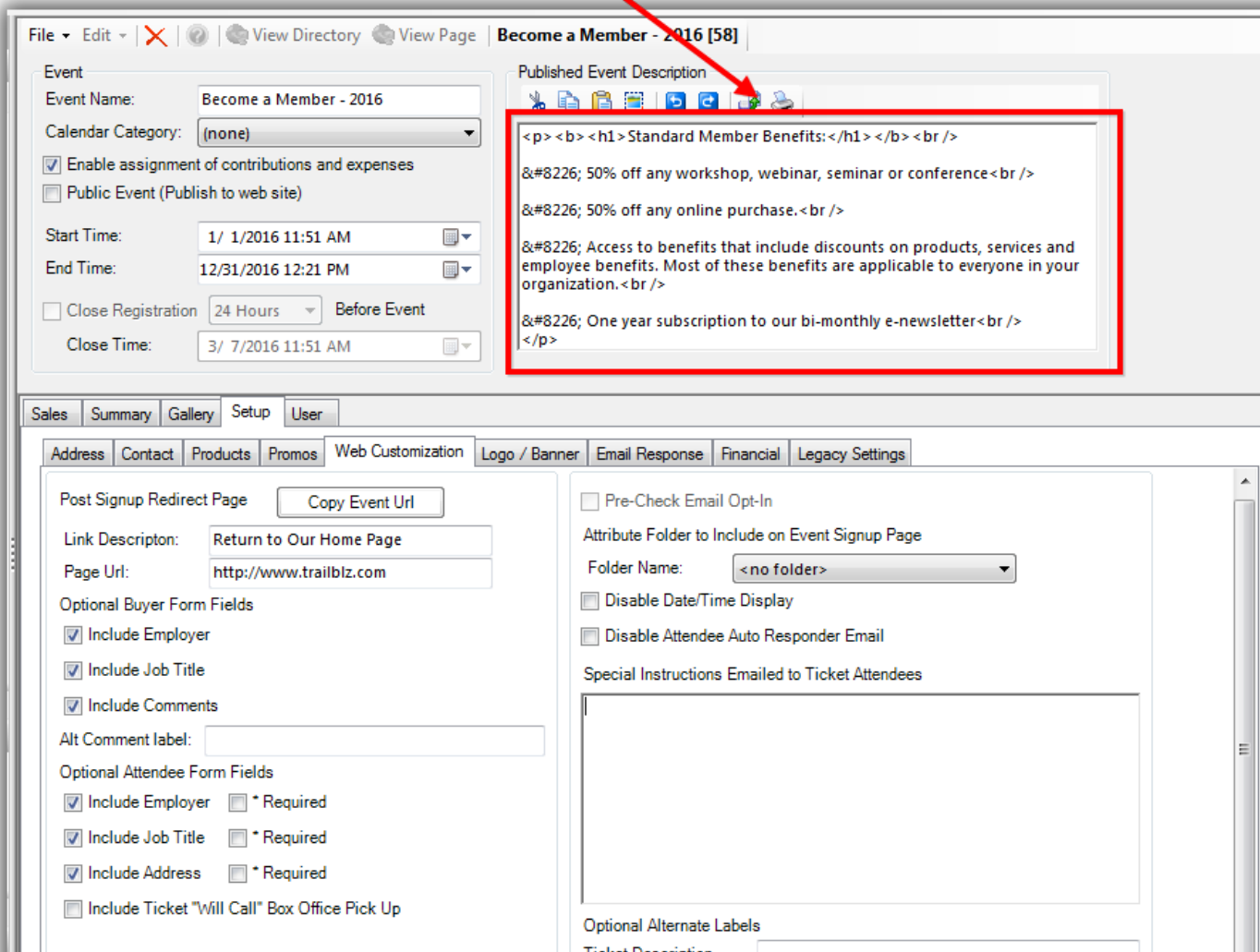
The screenshot displays the TrailBlazer web application interface. At the top, the 'Become a Member - 2016 [58]' event is selected. The 'Web Customization' tab is highlighted with a red box. Below this tab, the 'Post Signup Redirect Page' section is also highlighted with a red box. This section includes 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'. There are also checkboxes for 'Optional Buyer Form Fields' (Include Employer, Include Job Title, Include Comments) and 'Optional Attendee Form Fields' (Include Employer, Include Job Title, Include Address, Include Ticket "Will Call" Box Office Pick Up). The 'Include' checkboxes are all checked. The 'Alt Comment label' field is empty. To the right of the 'Web Customization' tab, there are other tabs like 'Address', 'Contact', 'Products', 'Promos', 'Logo / Banner', 'Email Response', 'Financial', and 'Legacy Settings'. The 'Published Event Description' section is visible on the right side of the event page.

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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.*

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Enter a description for your membership page e.g. what bennefits 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 creating a membership 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 columns. The left column contains event details: Event Name (Become a Member - 2016), Calendar Category (none), checkboxes for enabling contributions and public event, Start Time (1/ 1/2016 11:51 AM), End Time (12/31/2016 12:21 PM), and Close Registration (24 Hours Before Event). The right column contains the 'Published Event Description' field, which 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>
```

Below the event details, there are tabs for 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. The 'Setup' tab is active, showing sub-tabs for 'Address', 'Contact', 'Products', 'Promos', 'Web Customization', 'Logo / Banner', 'Email Response', 'Financial', and 'Legacy Settings'. The 'Web Customization' sub-tab is selected, showing options for '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', 'Optional Attendee Form Fields' (Include Employer, Include Job Title, Include Address, 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', and 'Optional Alternate Labels'.

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 **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.*

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File Edit 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

Contact

☒ Publish Contact Information

Organizer Name:

Email:

Phone:

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*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’**.

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File ▾ **Edit** ▾ **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

**<p><h1>Standard Member Benefits:</h1>
**

**• 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
**

</p>

Sales **Summary** **Gallery** **Setup** **User**

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

Address

☒ Publish Address Information

Venue Name:

Nation:

Street:

City:

State or Territory:

Zip Code:

County:

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*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.*

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The screenshot displays the TrailBlazer web application interface for creating a membership event. The main section is titled "Become a Member - 2016 [58]". It features a sidebar with event details and a main area for the published event description.

Event Details:

- 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:

<p><h1>Standard Member Benefits:</h1>

• 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
</p>

Navigation and Tools:

- Top tabs: Sales, Summary, Gallery, Setup, User
- Sub-tabs: Address, Contact, Products, Promos, Web Customization, **Logo / Banner**, Email Response, Financial, Legacy Settings
- Buttons: Undo, Redo, **Select Image**, Clear

Image Upload Section:

The "Select Image" button is highlighted with a red box. Below it, a preview area shows the TrailBlazer logo. A red arrow points to the logo with the text:

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

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*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.*


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The screenshot shows the TrailBlazer software interface for setting up an event. The main window is titled 'Become a Member - 2016 [58]'. On the left, the 'Event' section includes 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)' (unchecked). It also has fields for 'Start Time' (1/ 1/2016 11:51 AM), 'End Time' (12/31/2016 12:21 PM), 'Close Registration' (24 Hours), and 'Close Time' (3/ 7/2016 11:51 AM). On the right, the 'Published Event Description' section contains HTML-formatted text describing member benefits. At the bottom, the 'Setup' tab is selected, and the 'Email Response' sub-tab is highlighted. A dropdown menu for 'Template' is open, showing options like '< No Email Template >', '2016 - Membership Thank-You Receipt', and several 2014 e-newsletter templates. Red arrows and boxes highlight the 'Setup' tab, the 'Email Response' sub-tab, and the template dropdown menu.

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.

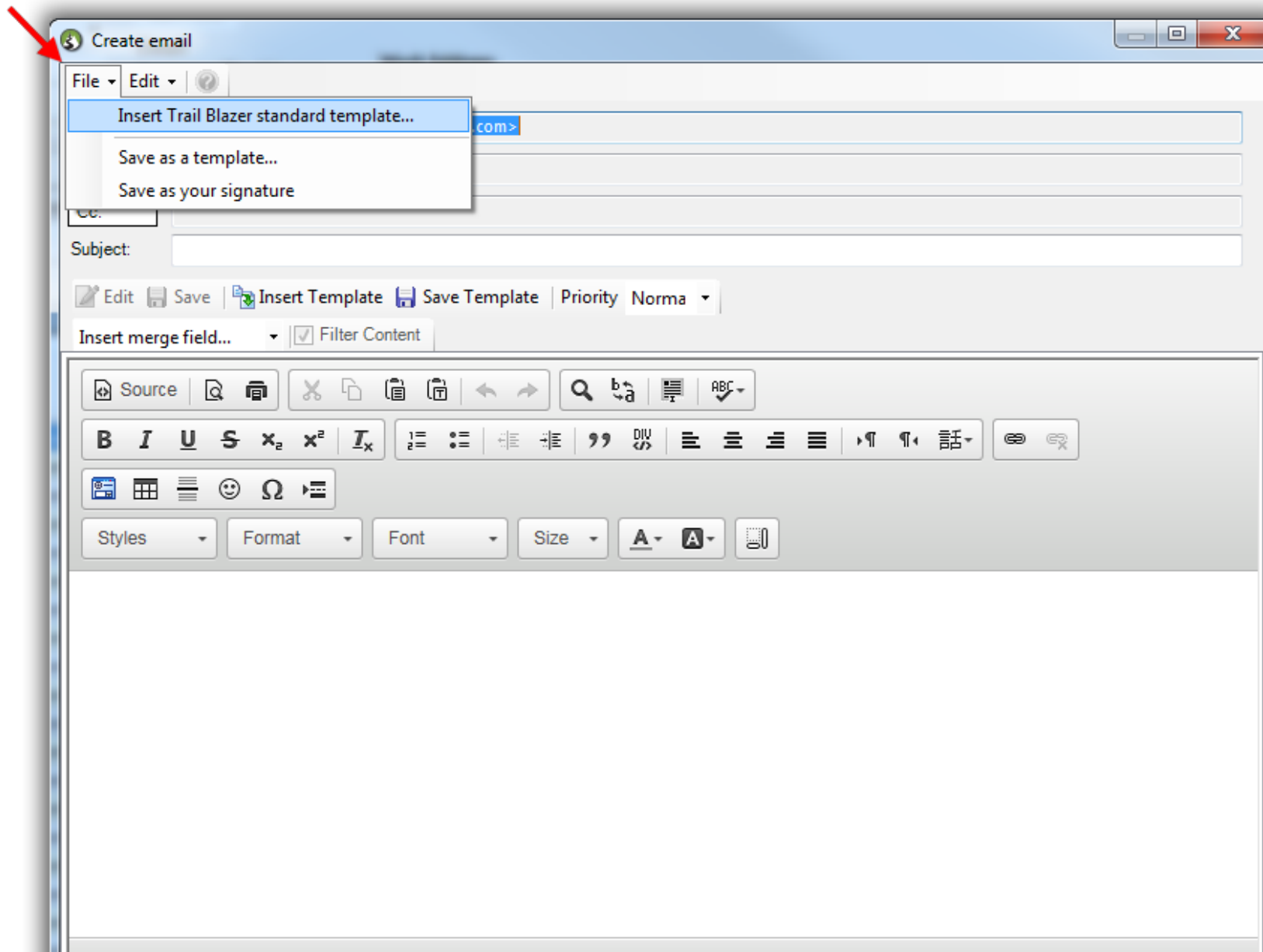
(You can choose a 'Standard Trail Blazer Template' from within the email

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 **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

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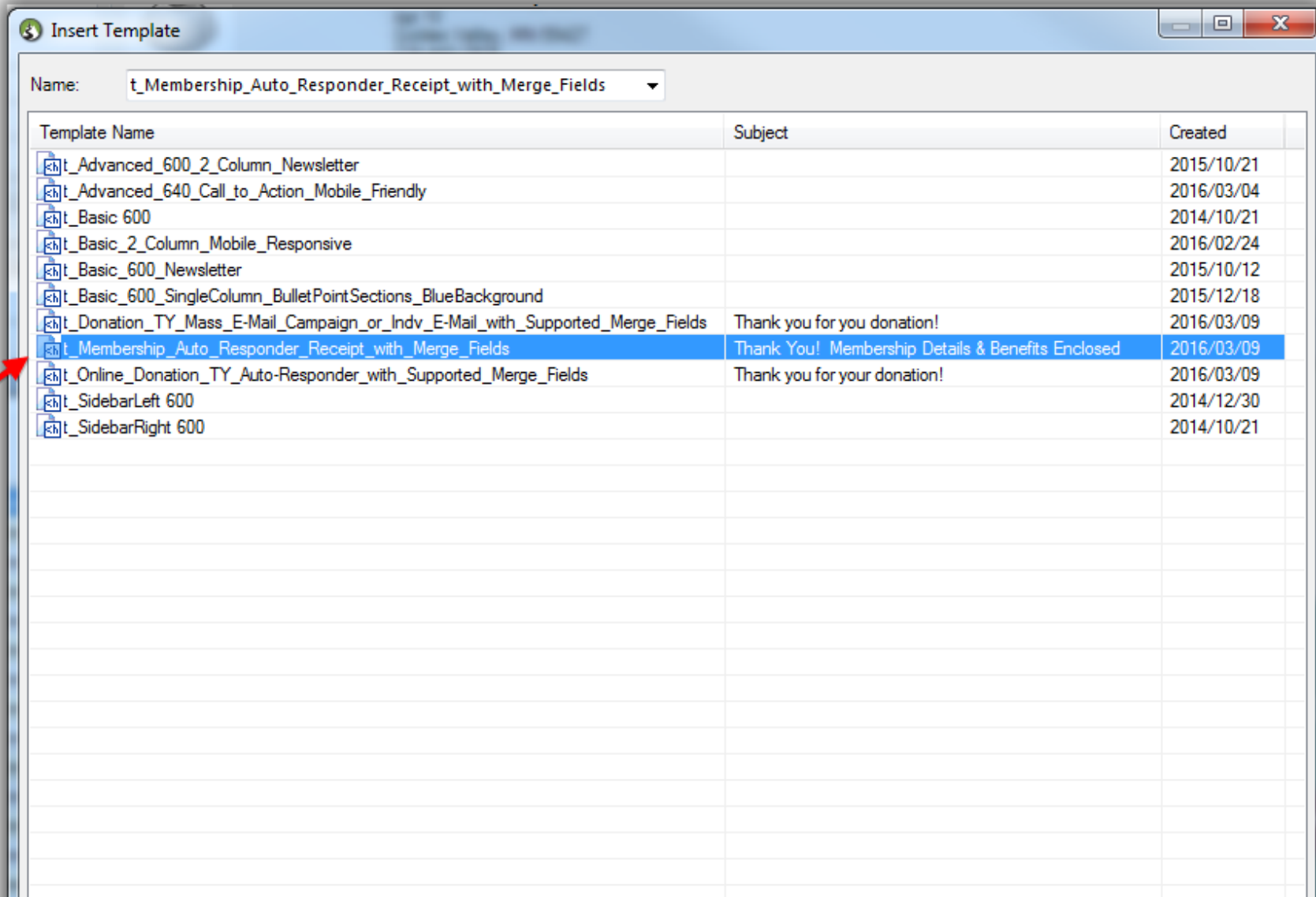


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Img 2 – Choose the Membership Template

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Get started with a standard membership template.



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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

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2

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

• 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
</p>

Sales Summary Gallery Setup User

Orders Order Lines Tickets

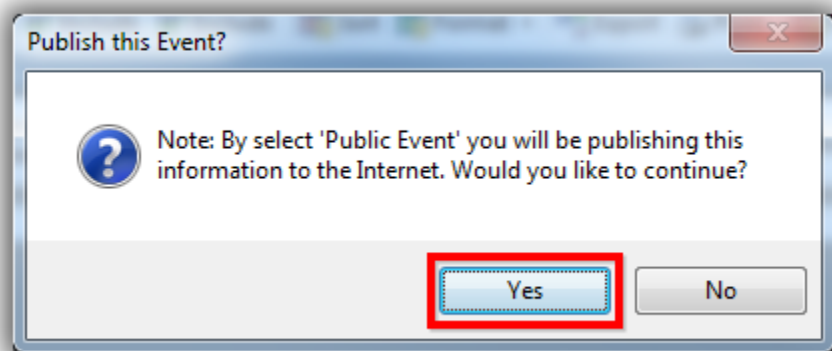
New Refresh Include Exclude Sort Format Export Print Pivot

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	

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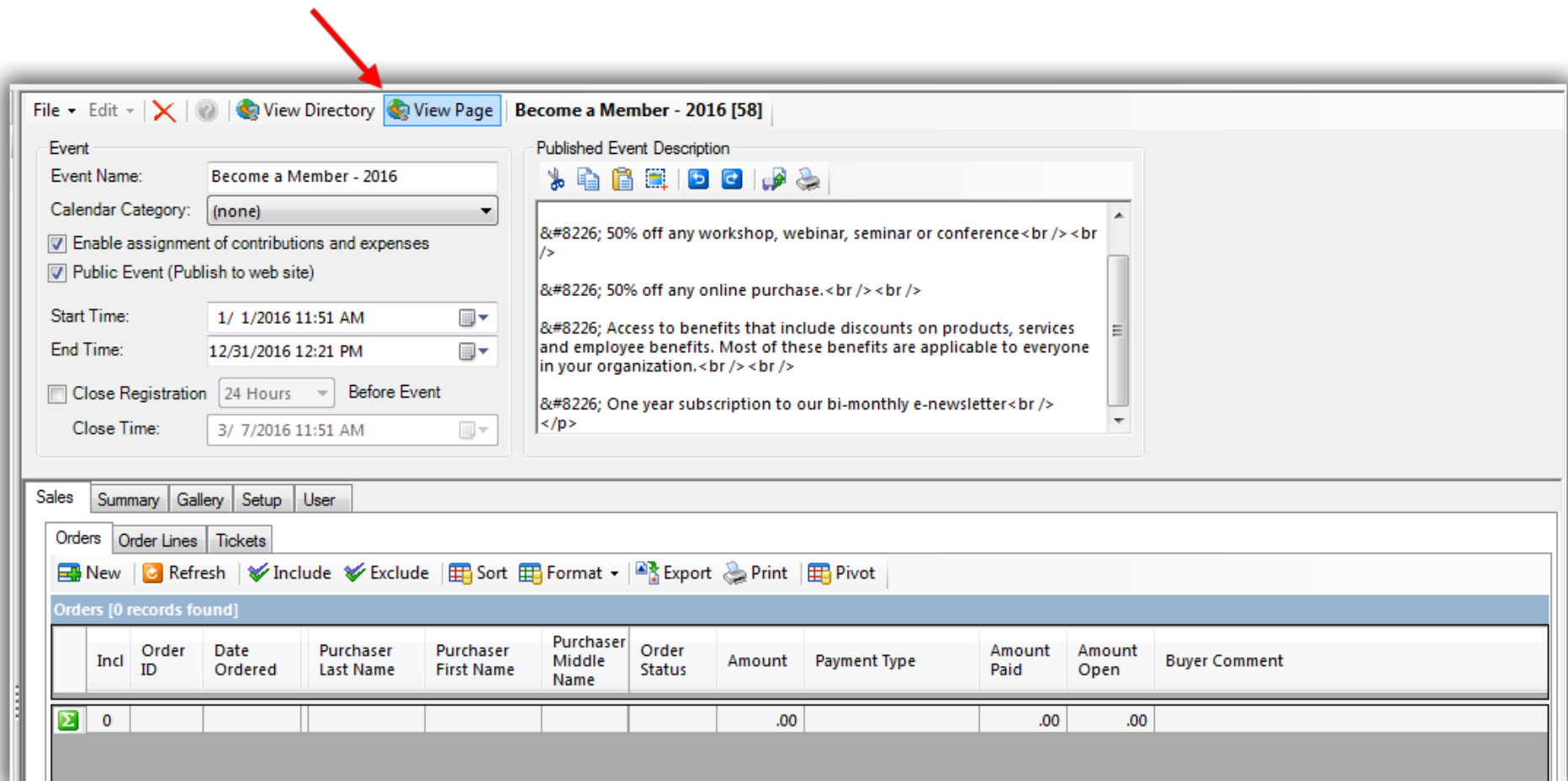
Img 2 of 2 – Click [Yes] to Finish Publishing your Membership Event



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.

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



The screenshot shows the TrailBlazer software interface for managing membership events. At the top, there is a navigation bar with buttons for 'View Directory' and 'View Page'. A red arrow points to the 'View Page' button. Below the navigation bar, the main content area is titled 'Become a Member - 2016 [58]'. On the left, there is a form for event details, including fields for Event Name, Calendar Category, Start Time, End Time, and Close Time. On the right, there is a 'Published Event Description' section with a text area containing HTML-formatted text. Below the event details, there is a 'Sales' section with tabs for 'Summary', 'Gallery', 'Setup', and 'User'. The 'Summary' tab is selected, showing a table of orders. The table has 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 a total amount of .00.

Event Details:

- 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:

• 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
</p>

Sales Summary:

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	

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

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Become a Member - 2016

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

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

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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*)

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Top-Half of the checkout screen.

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

Order details.

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

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

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

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

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Bottom-half of the checkout screen.

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

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: C5UKG

Organizer

Trail Blazer Campaign Services, LLC

866-909-8700

support@trailblz.com

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

[Add to my Calendar](#)

[National Camera](#)

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

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

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

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

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

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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.

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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*)

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

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.

Count.

Buyer comments.

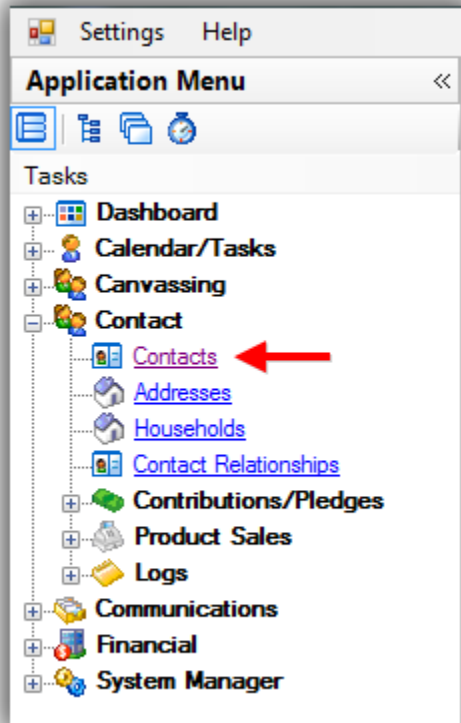
Order status.

Ind	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
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.	
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		

#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.*

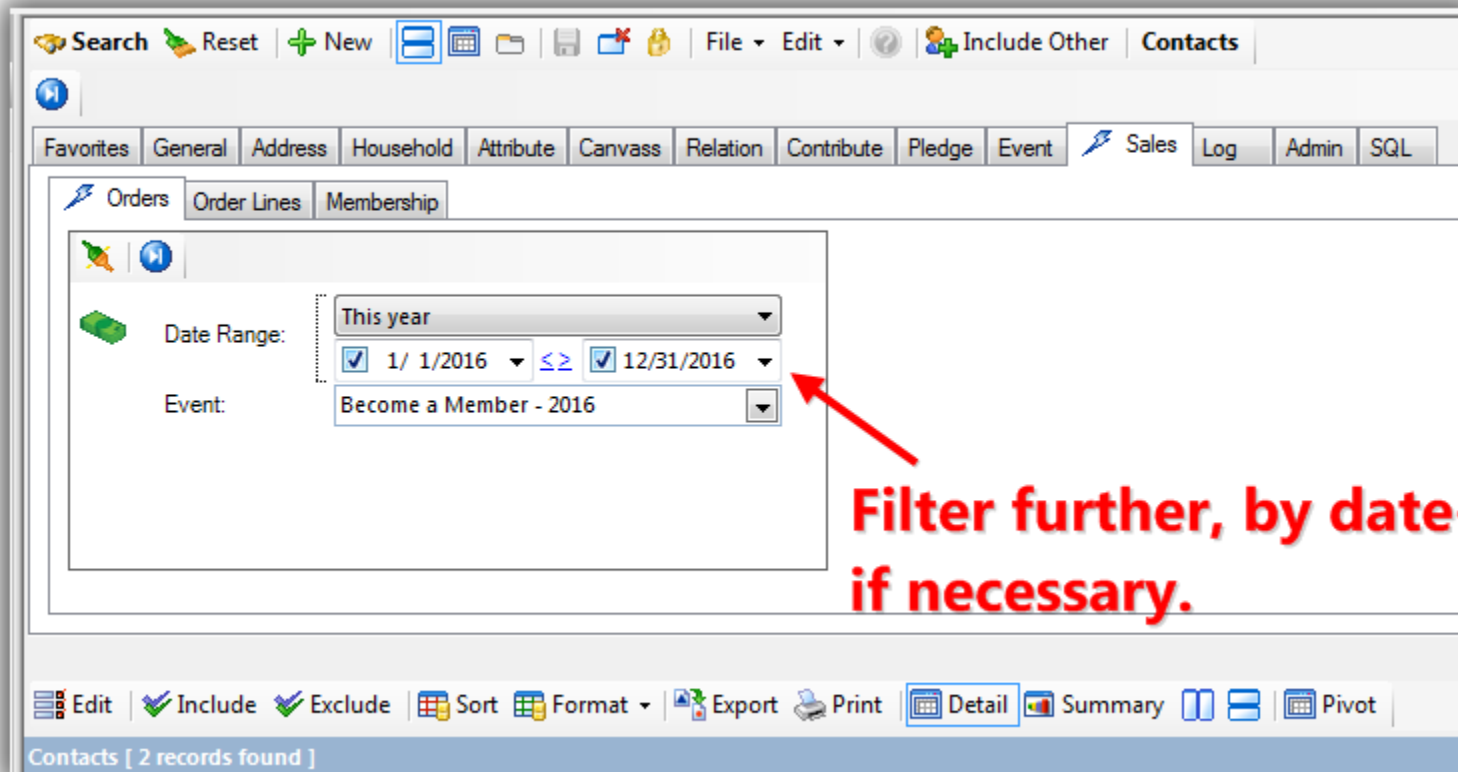
Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

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.

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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)

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

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

Orders Order Lines **Membership**

Membership: Individual Member (1 Year 1/1/16 -12/31)
 Membership Start: < custom, according to dates below >
 Membership Expiration: < custom, according to dates below >

Select a specific membership type to query by.

Edit Include Exclude Sort Format Export Print Detail Summary Pivot

Contacts [1 records found]

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 today's (3/11/2016) date which returned 4 results.*

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

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

1

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** listg 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 [Icons] **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 Reg
- Logs
- Communications
- Financial
- System Manager

Product: <ignore>

Edit [Icons] Include Exclude Sort Format [Icons] Export Print Pivot

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	33	3/10/2016	NA	Trail Blazer ...		Open	Members...	Company Members...
	<input checked="" type="checkbox"/>	45	31	3/10/2016	Kristenson	Joel		Open	Members...	Individual Member (...)

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

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

📘 **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.*