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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.

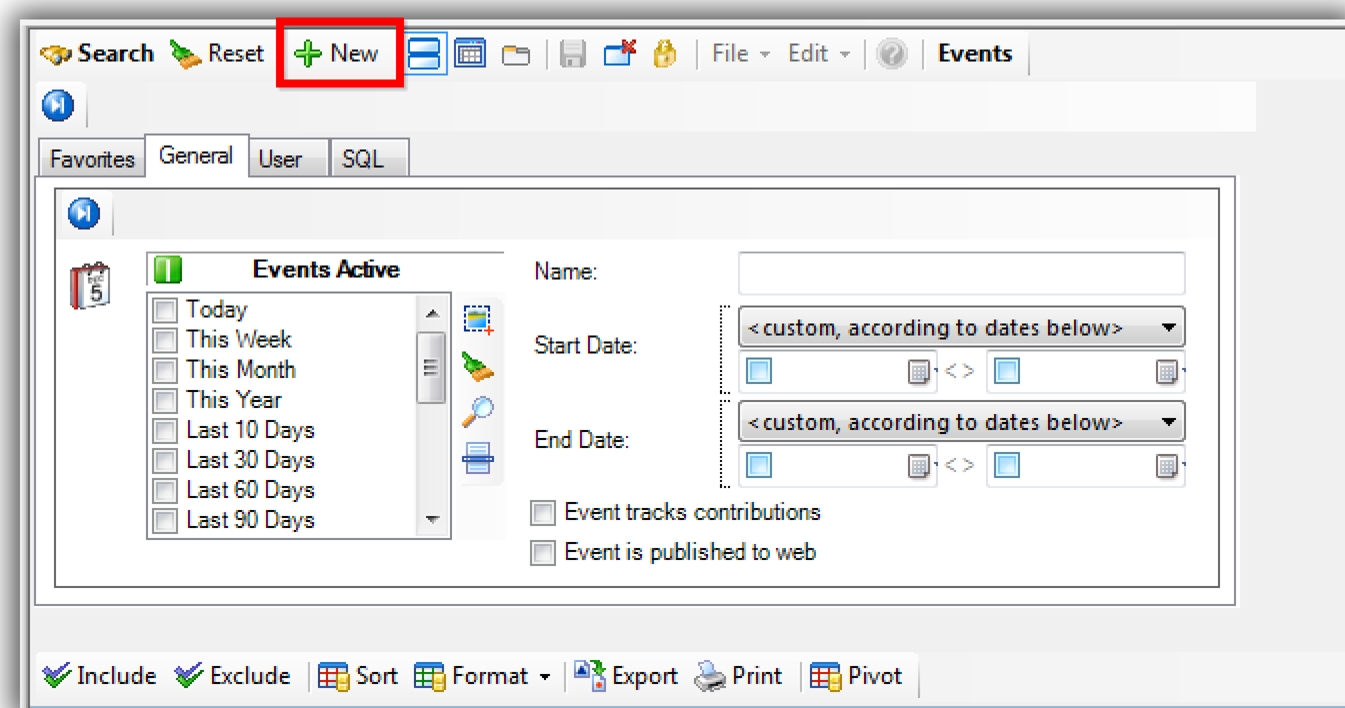
The last section shows how to run **search queries** by membership information i.e. whose membership **expired**, who your current members are, etc.

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

Outline

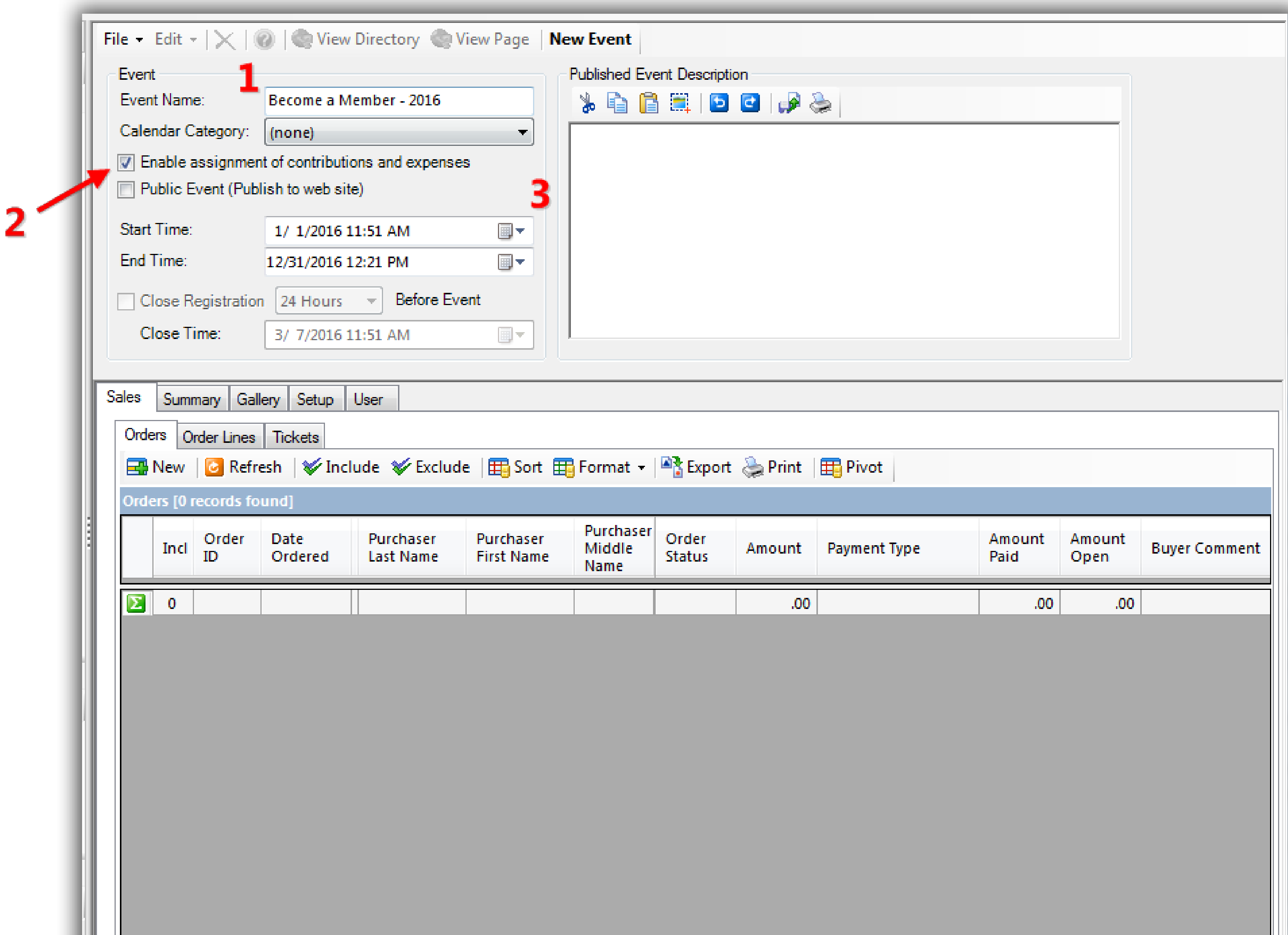
#1 – Creating a Membership 'Event' Record and Creating Membership Levels to Sell

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



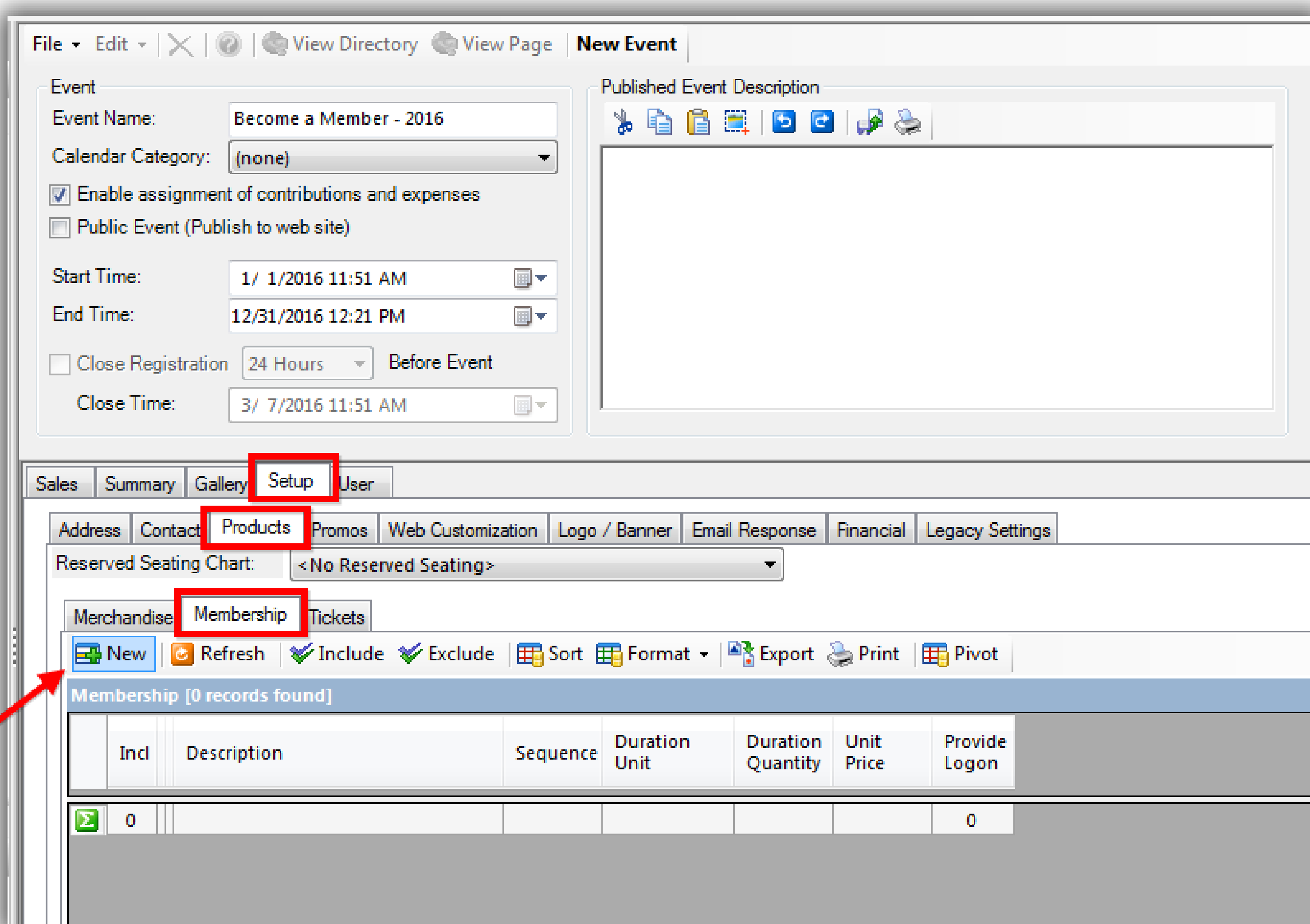
Give the ‘event’ a **name**, check the box to ‘**Enable Assignment of Contributions and Expenses**’, set a **date-range**, and click **[Save]**.

*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.*


File
Edit
View Directory
View Page
New Event
1
Event
Event Name:
Become a Member - 2016
Calendar Category:
(none)
Enable assignment of contributions and expenses
Public Event (Publish to web site)
2
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

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.



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

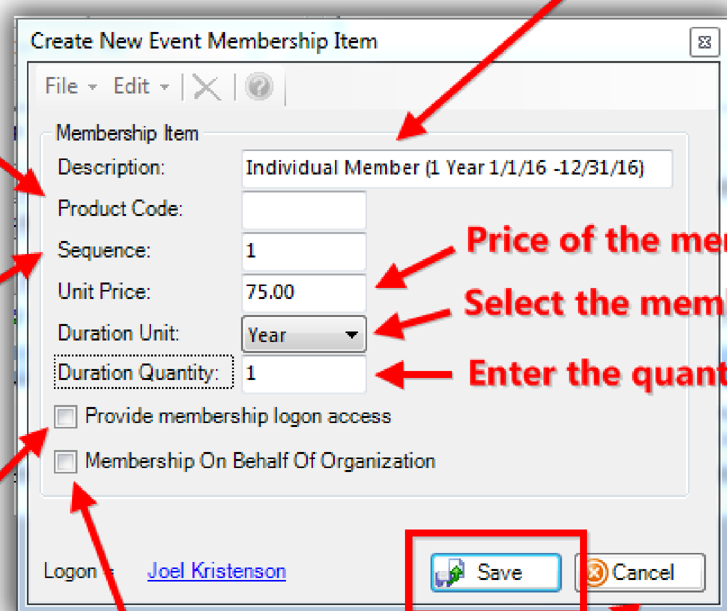
Enter all of the *required* information as well as any of the *optional* information that you want. *My example is below for an '**Individual, 1 year membership, for $75.00**'.*

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.

Price of the membership item.

Select the membership duration.

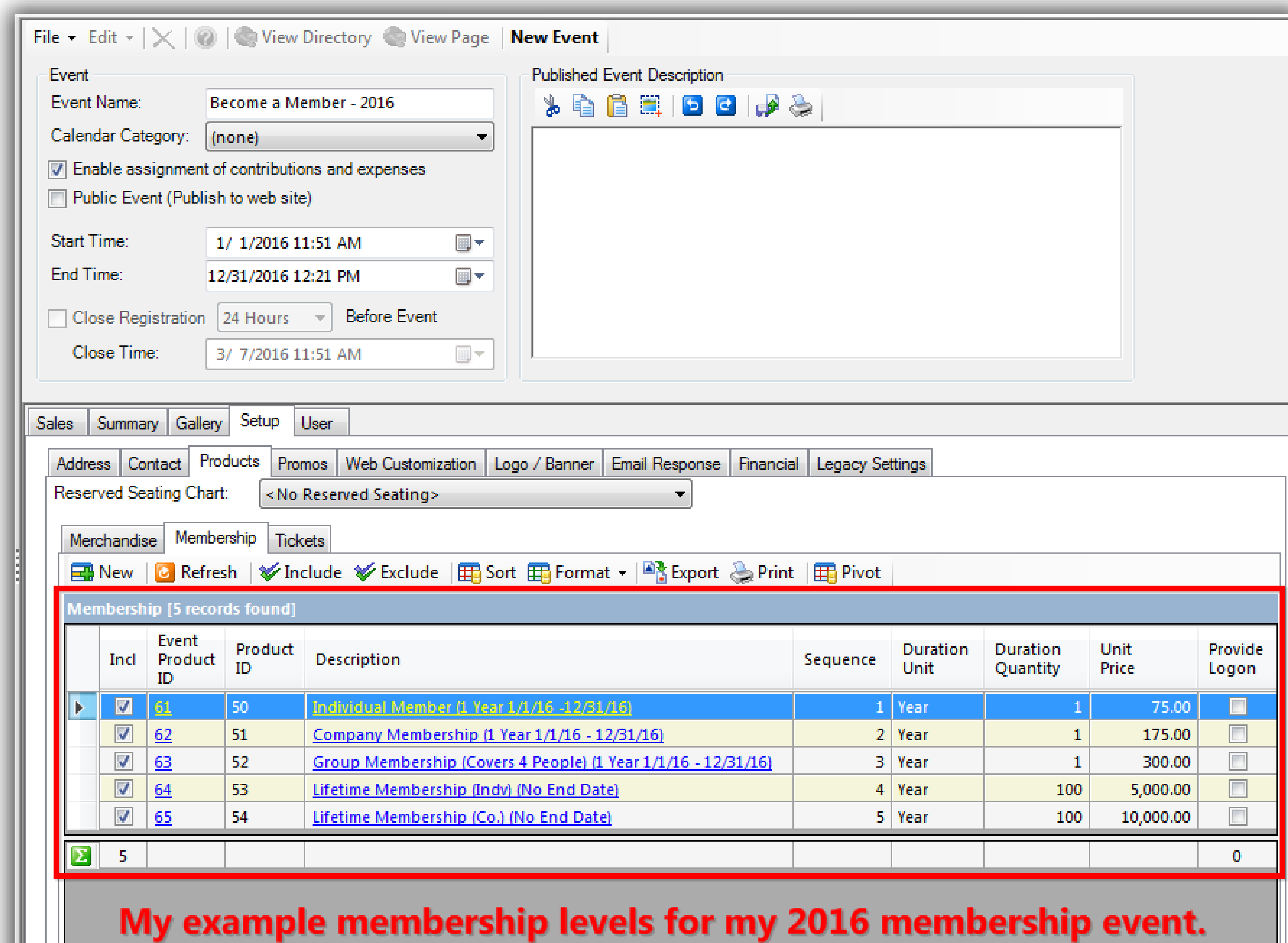
Enter the quantity (usually left at 1).

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

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

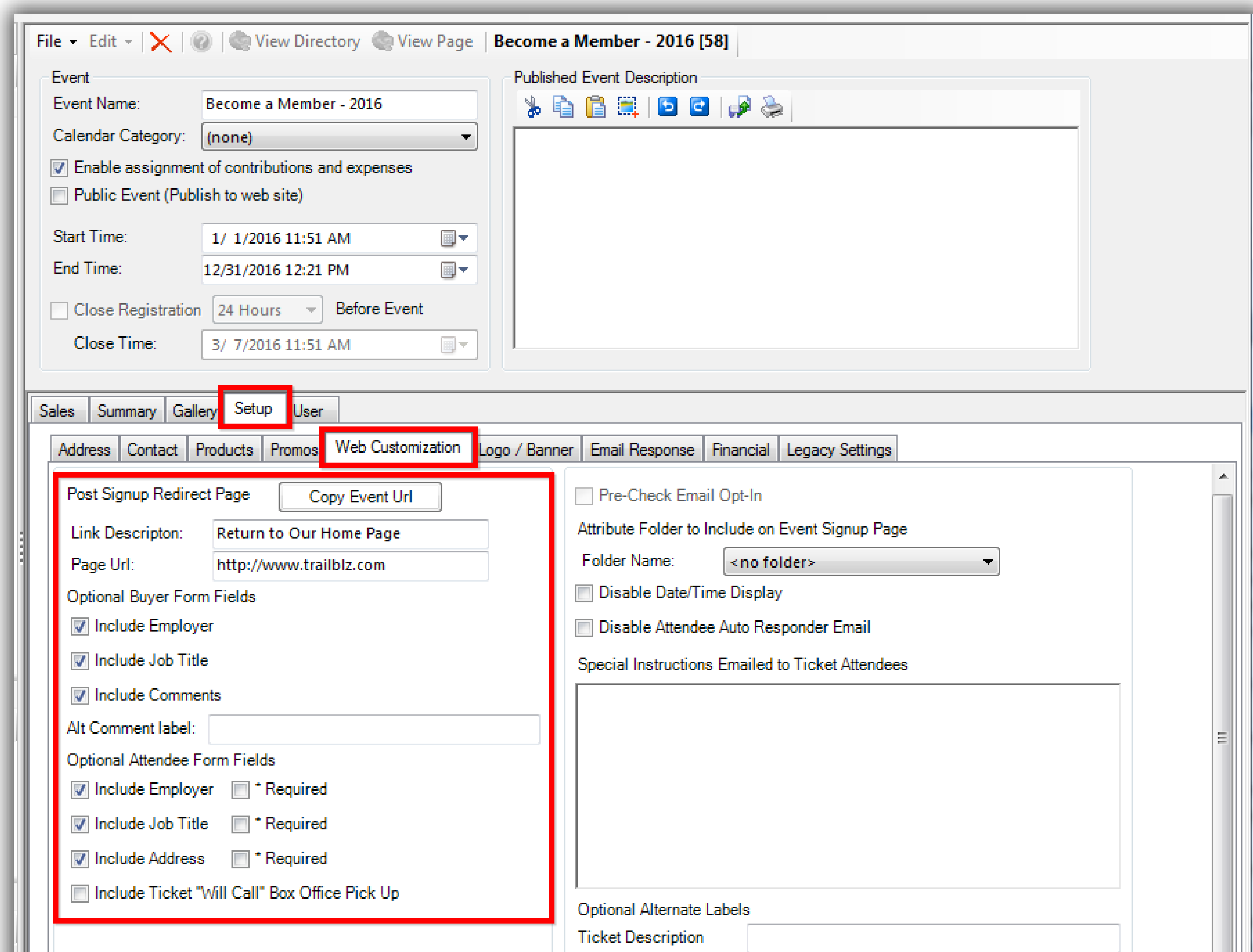
This *option allows an organization (company) to purchase a membership for an individual.

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


File Edit View Directory View Page New Event
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
Sales Summary Gallery Setup User
Address Contact Products Promos Web Customization Logo / Banner Email Response Financial Legacy Settings
Reserved Seating Chart: <No Reserved Seating>
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
61 50 Individual Member (1 Year 1/1/16 -12/31/16) 1 Year 1 75.00
62 51 Company Membership (1 Year 1/1/16 - 12/31/16) 2 Year 1 175.00
63 52 Group Membership (Covers 4 People) (1 Year 1/1/16 - 12/31/16) 3 Year 1 300.00
64 53 Lifetime Membership (Indv) (No End Date) 4 Year 100 5,000.00
65 54 Lifetime Membership (Co.) (No End Date) 5 Year 100 10,000.00
5 0
My example membership levels for my 2016 membership event.

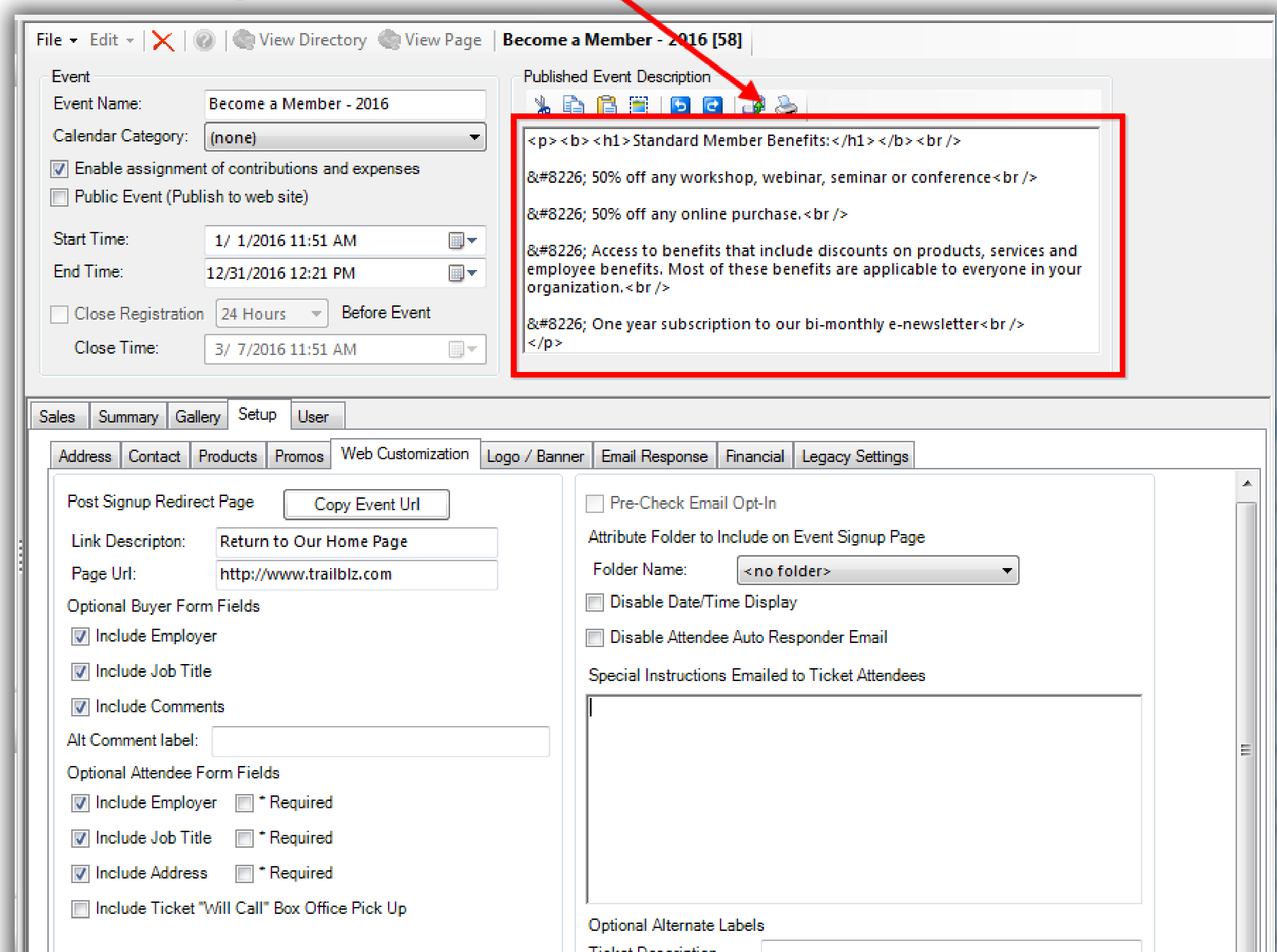
Next navigate to the **Website Customization** tab where you can configure many other settings i.e. where to send your members to after they make a purchase, extra fields to collect, add attribute checkboxes, etc. *My example is below where I turned a few optional fields on, and entered a post-redirect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

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



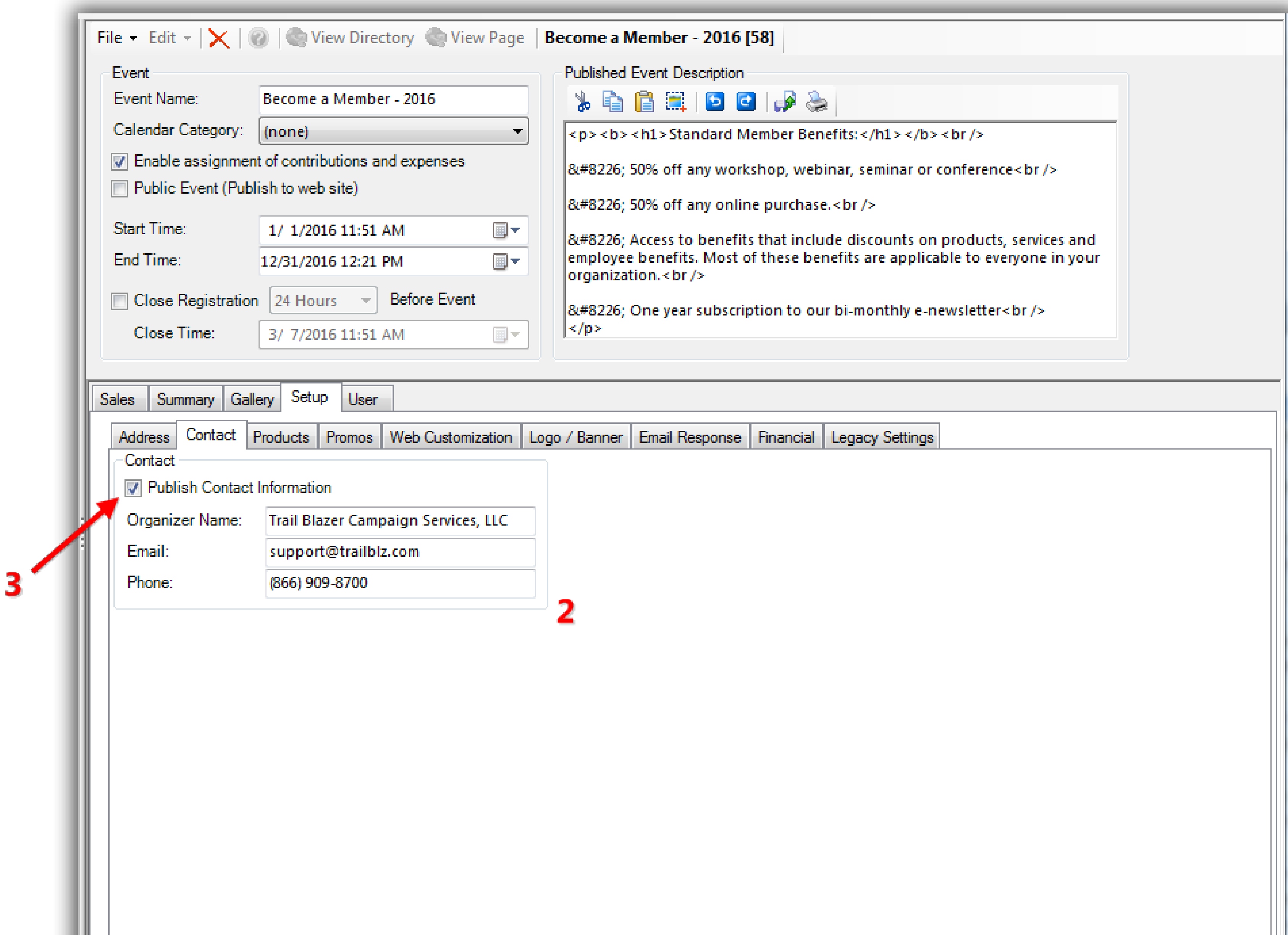
Write a **description** for the event in the upper-right text box (ex: membership discounts, special offers, further instructions, etc.). *My example is below which utilizes a small amount of html and css to further style the way the description will display online.*

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).

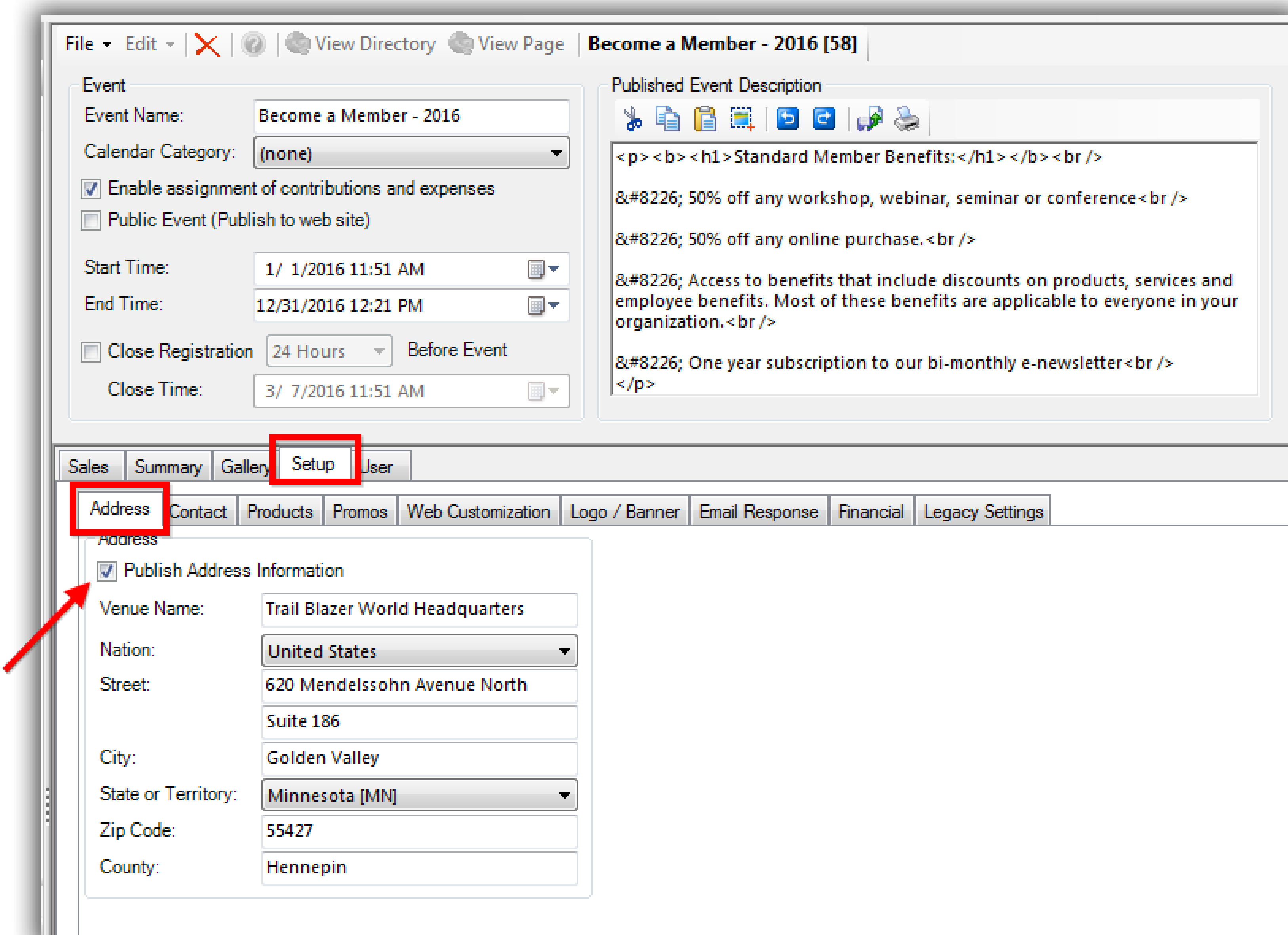


Tip: If you want to style your membership page further take a look at this article.

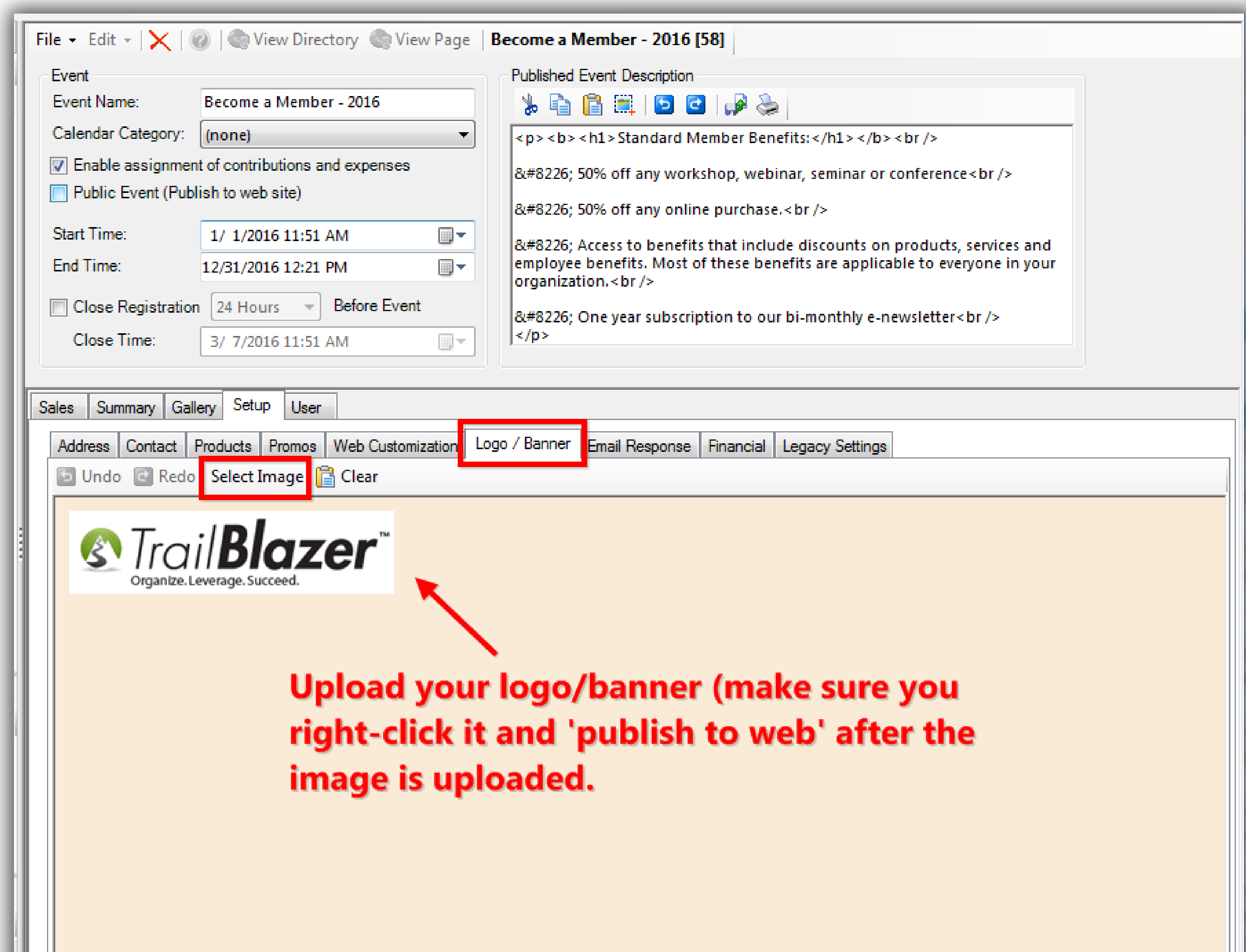
Next, navigate to **Setup** > **Contact**, enter your **phone/email**, and check the box to '**Publish Contact Information**'. *My example is below, *if the box to publish this info is greyed out you'll need to* ***close, and re-open*** *the event record.*


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
<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
Contact
Publish Contact Information
Organizer Name:
Trail Blazer Campaign Services, LLC
Email:
support@trailblz.com
Phone:
(866) 909-8700
3
2

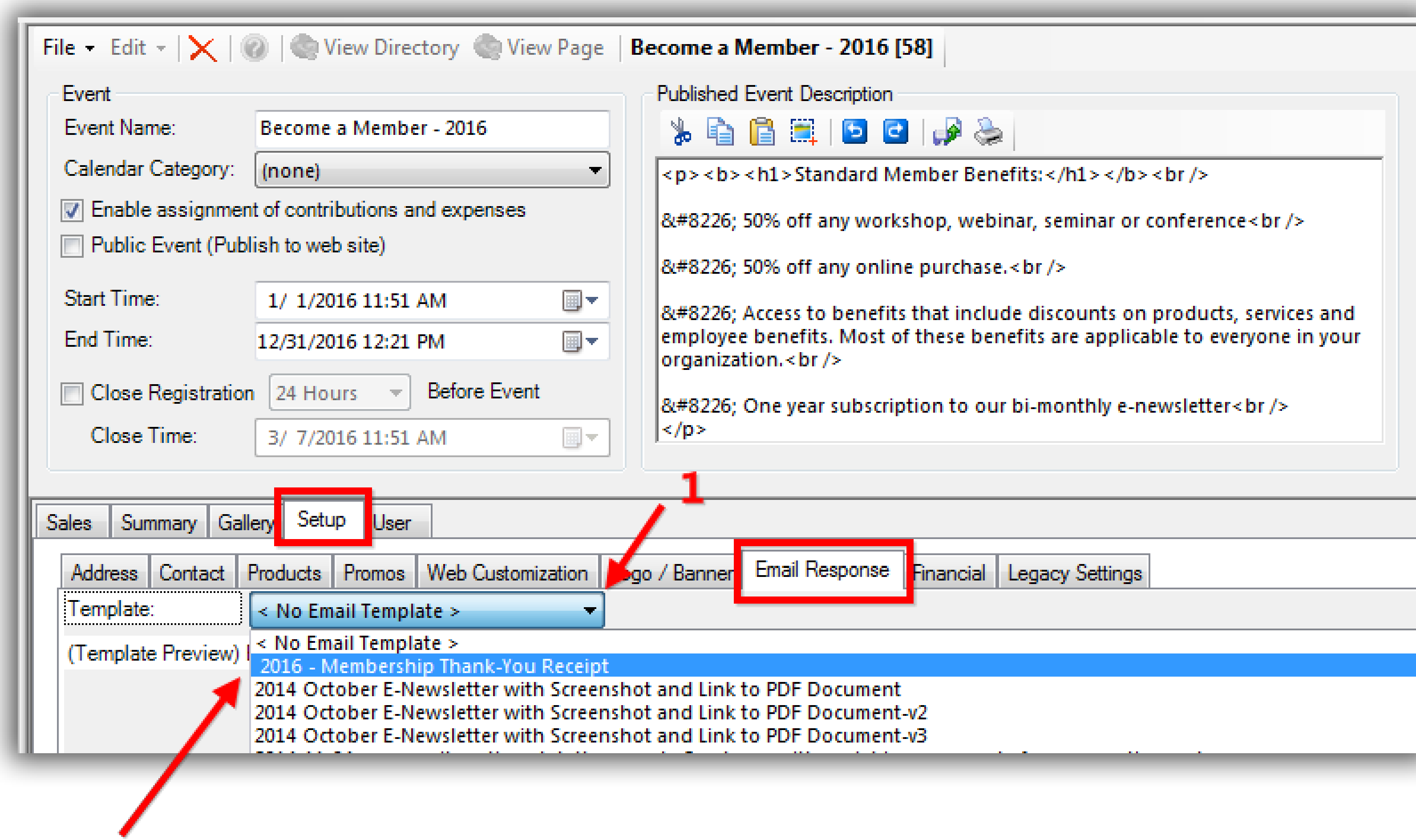
*If you want to display a map of your **address**, navigate to the **Address** tab, fill out your information, and check the box for **'Publish Address Information'**.


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
<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:
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

*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.*


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
<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
Undo
Redo
Select Image
Clear
TrailBlazer
Organize. Leverage. Succeed.
Upload your logo/banner (make sure you right-click it and 'publish to web' after the image is uploaded.

*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.*

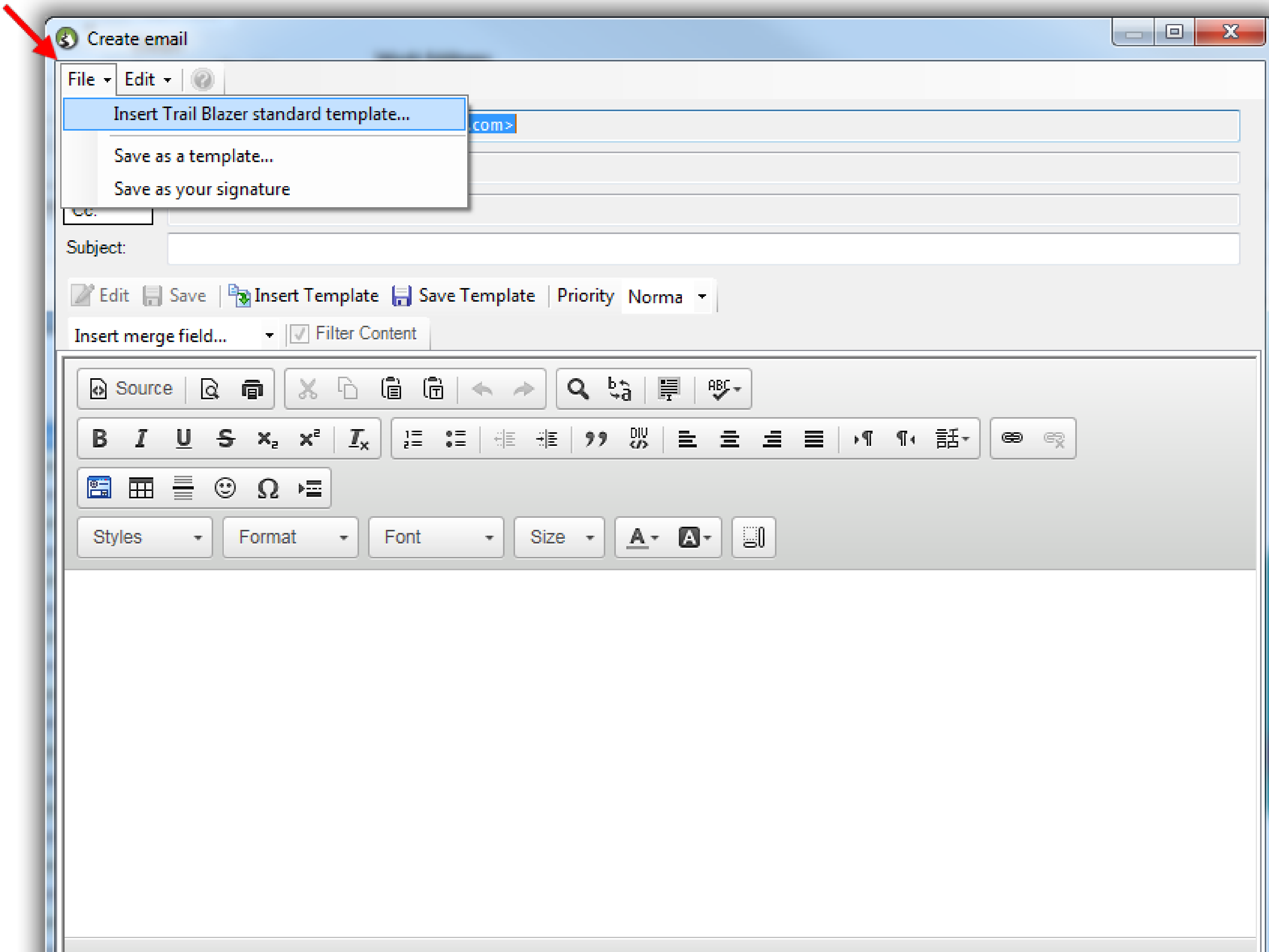


2. Select your own email template to use as an auto-responder if you don't want to use the generic receipt that get's emailed out.

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

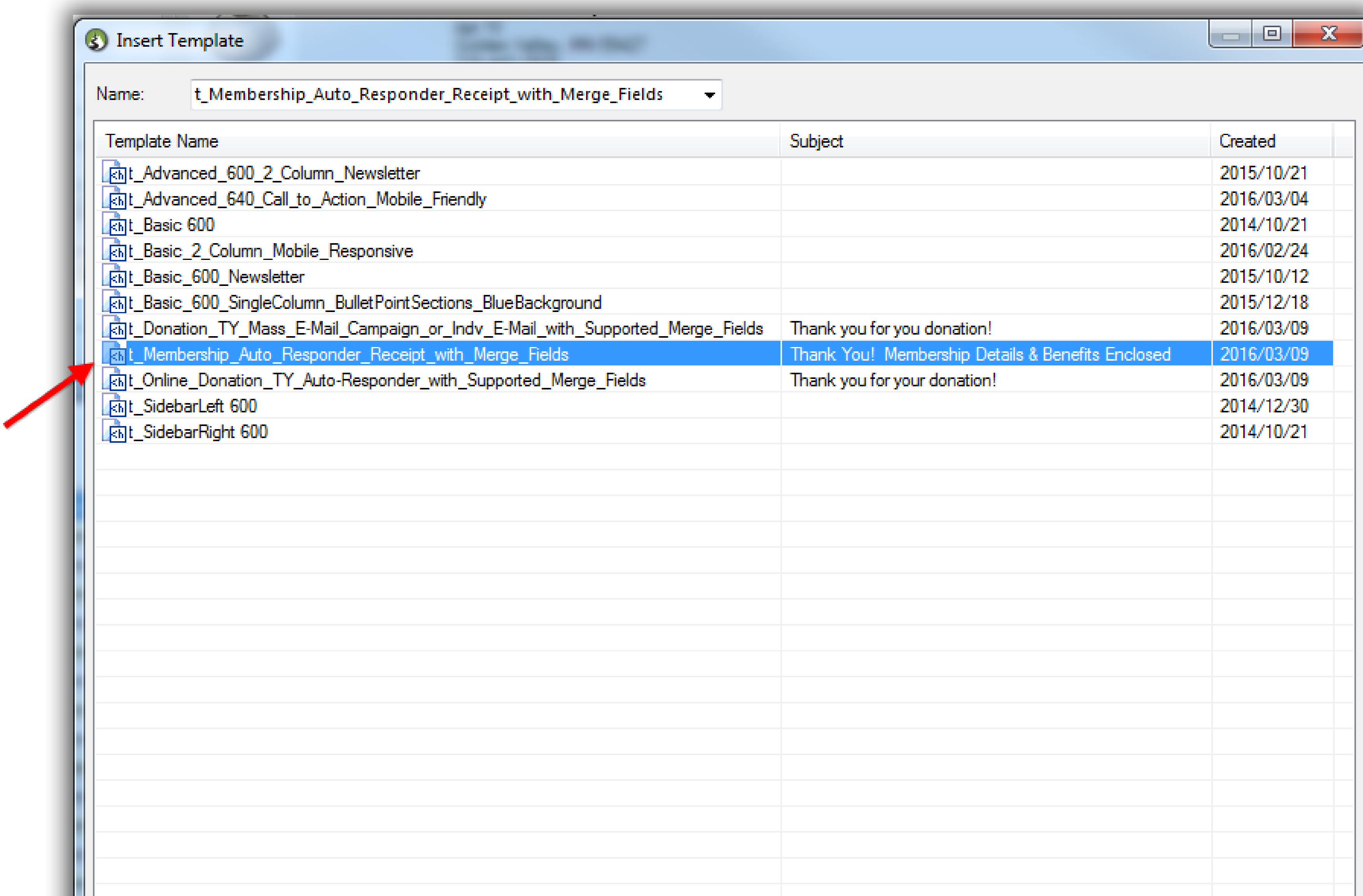
Tip: You can find a similar one to use as a starting point by inserting one of our '**Standard Trail Blazer Templates**' from within the email composer, **if* you want to do this you'll open the composer, and select **File** > **Insert Standard Trail Blazer Template** > Select the **Membership** one:

Img 1 – Select Standard Templates


Create email
File
Edit
Insert Trail Blazer standard template...
Save as a template...
Save as your signature
Subject:
Edit
Save
Insert Template
Save Template
Priority
Norma
Insert merge field...
Filter Content
Source
Styles
Format
Font
Size

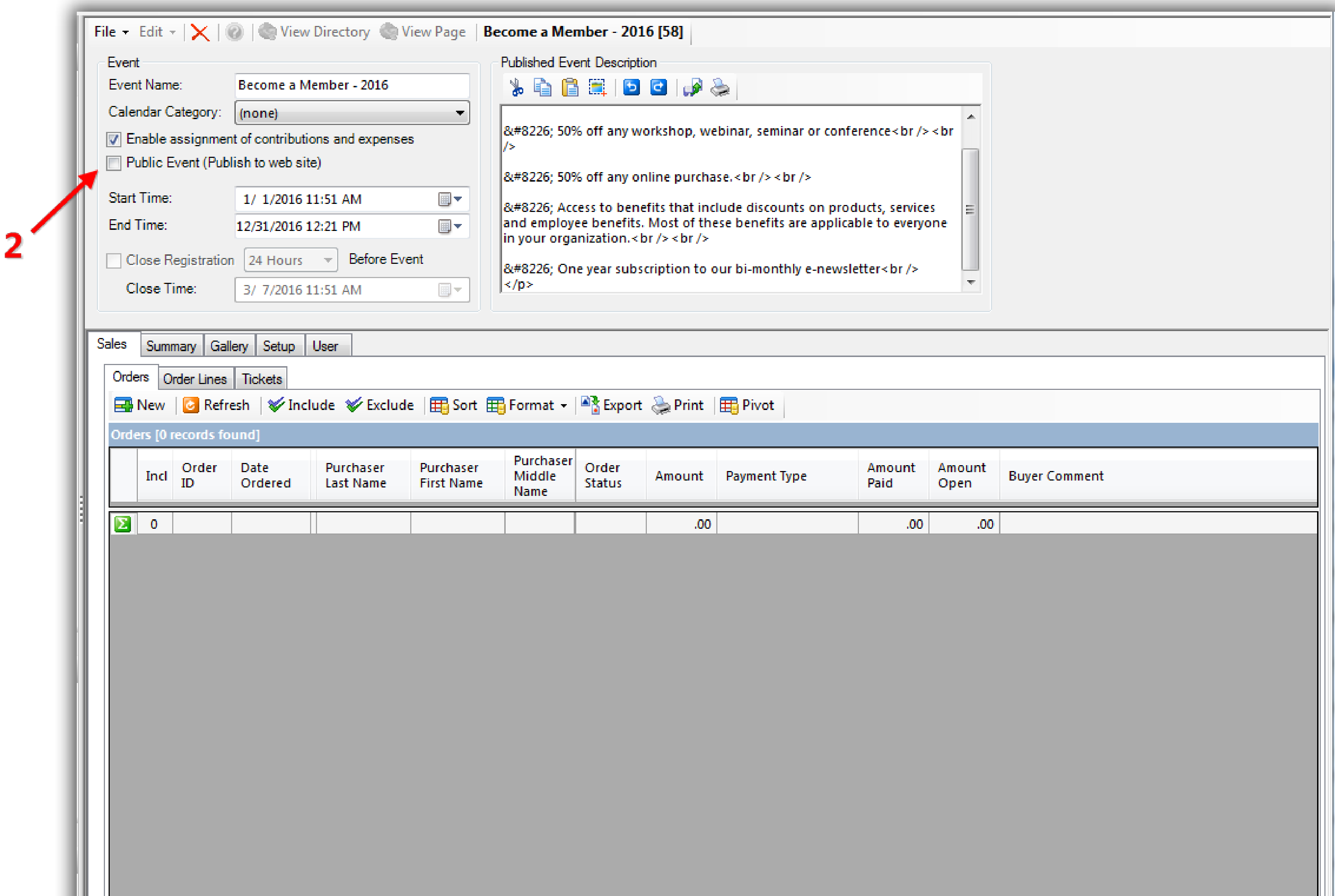
Img 2 – Choose the Membership Template

Get started with a standard membership template.



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

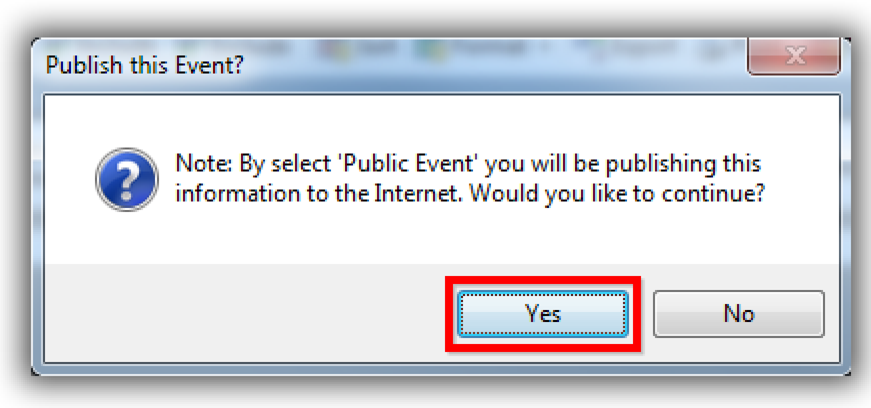

2
File
Edit
View Directory
View Page
Become a Member - 2016 [58]
Event
Event Name:
Become a Member - 2016
Calendar Category:
(none)
Enable assignment of contributions and expenses
Public Event (Publish to web site)
Start Time:
1/ 1/2016 11:51 AM
End Time:
12/31/2016 12:21 PM
Close Registration
24 Hours
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.

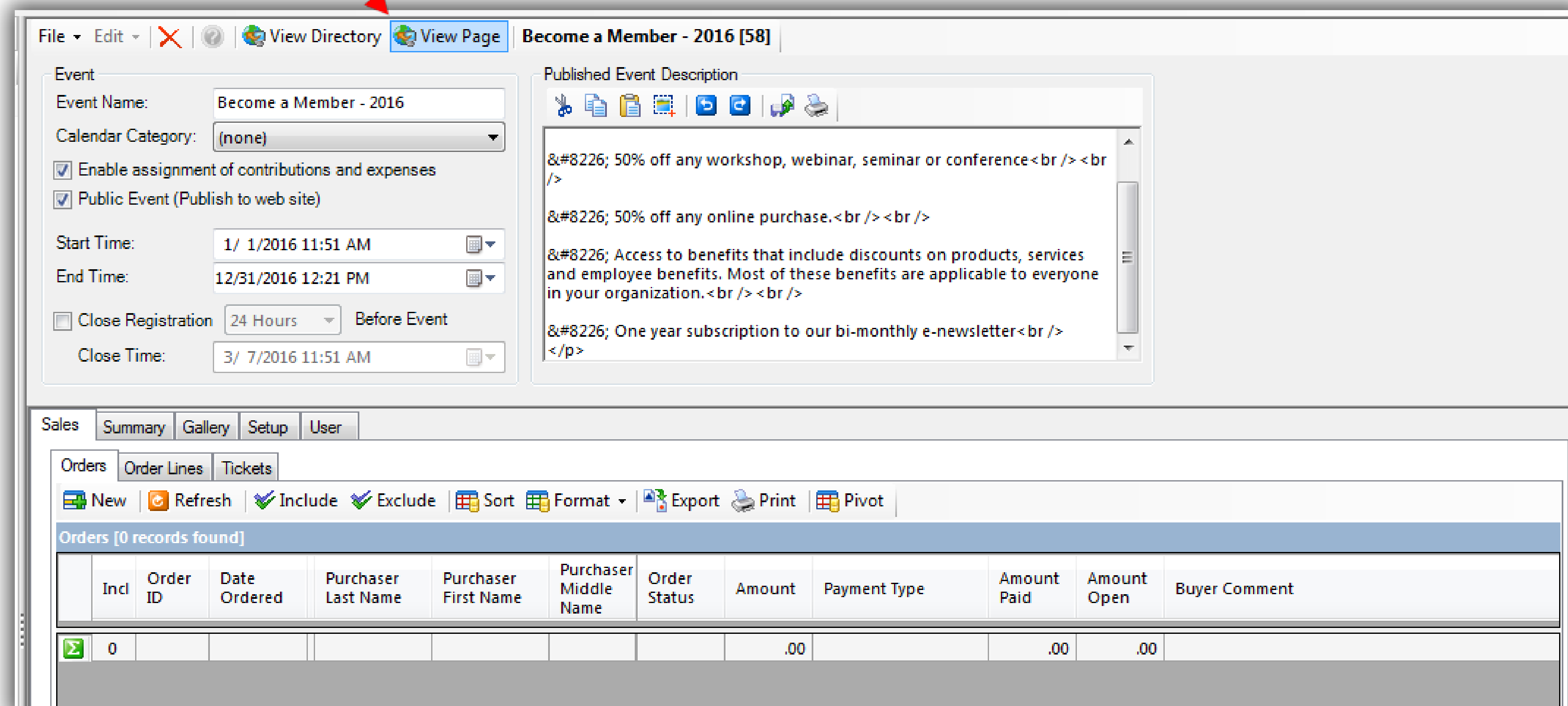
• One year subscription to our bi-monthly e-newsletter
</p>
Sales
Summary
Gallery
Setup
User
Orders
Order Lines
Tickets
New
Refresh
Include
Exclude
Sort
Format
Export
Print
Pivot
Orders [0 records found]
Incl
Order ID
Date Ordered
Purchaser Last Name
Purchaser First Name
Purchaser Middle Name
Order Status
Amount
Payment Type
Amount Paid
Amount Open
Buyer Comment
0
.00
.00
.00

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

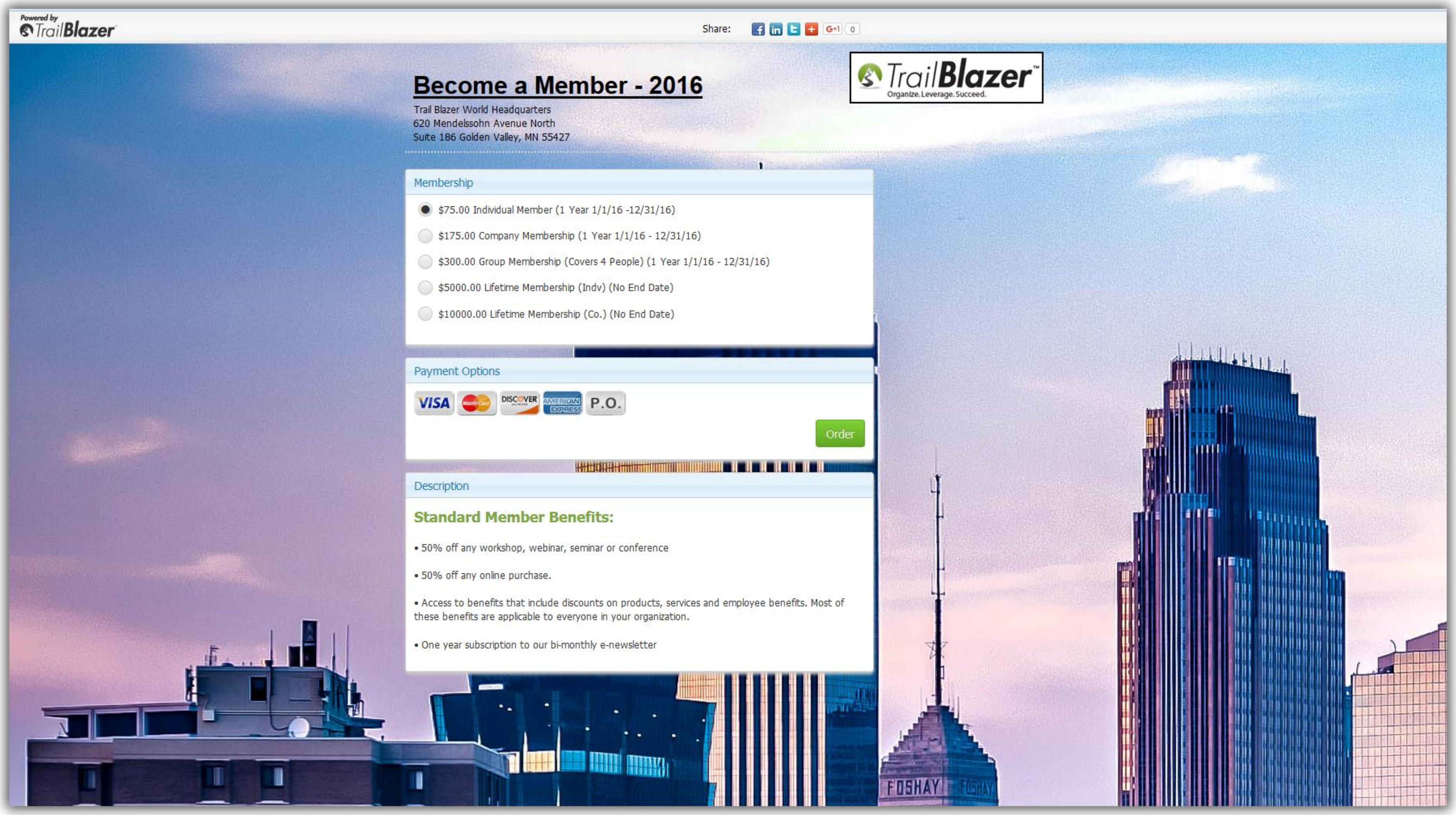


Next you'll want to **preview** what your membership event looks like, click **[Save]** one more time in the bottom-right, and then click the **[View Page]** button at the top.

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



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

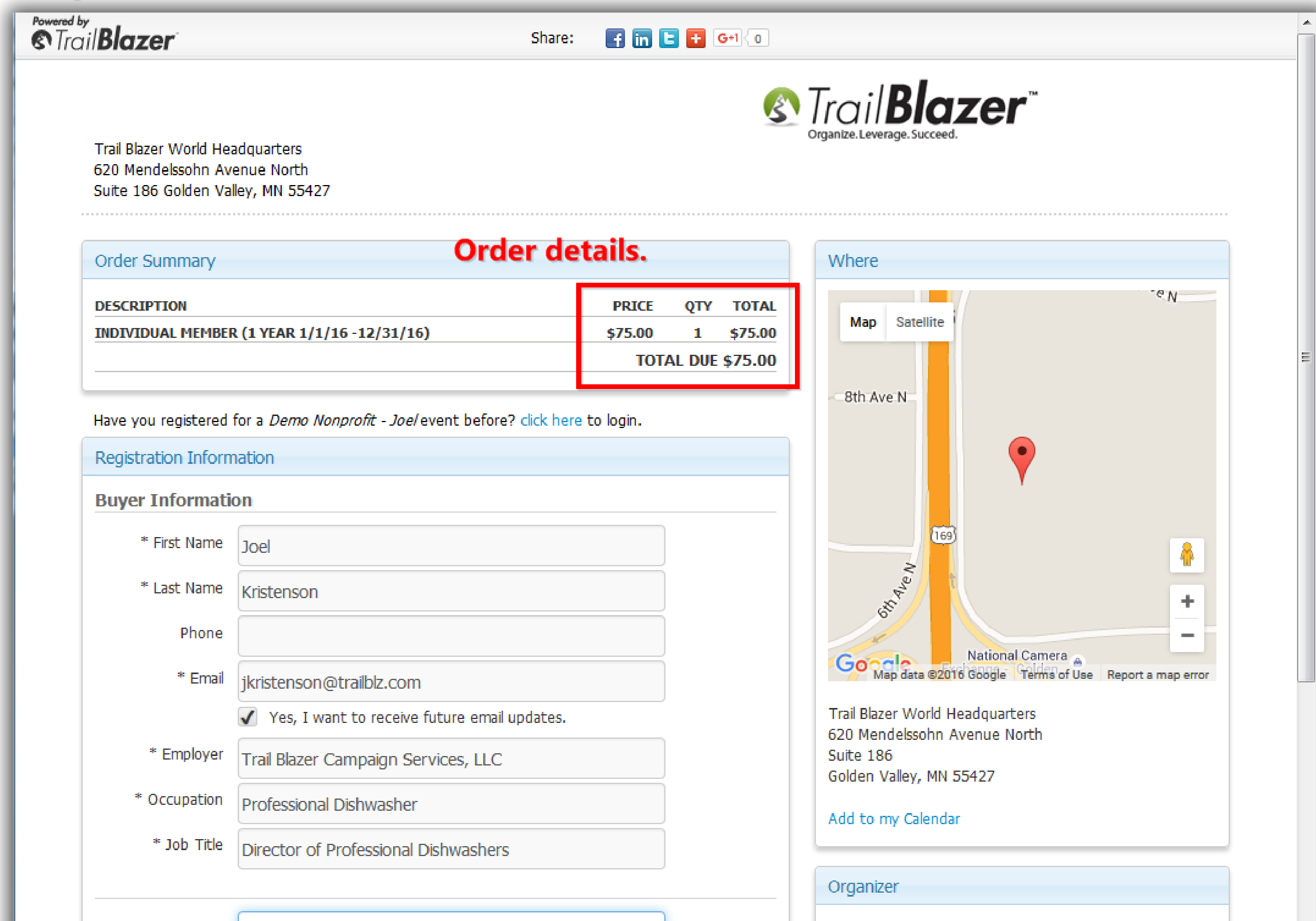

Powered by TrailBlazer
Share:
Become a Member - 2016
Trail Blazer World Headquarters
620 Mendelssohn Avenue North
Suite 186 Golden Valley, MN 55427
TrailBlazer
Organize. Leverage. Succeed.
Membership
$75.00 Individual Member (1 Year 1/1/16 -12/31/16)
$175.00 Company Membership (1 Year 1/1/16 - 12/31/16)
$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
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
FOSHAY

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*)

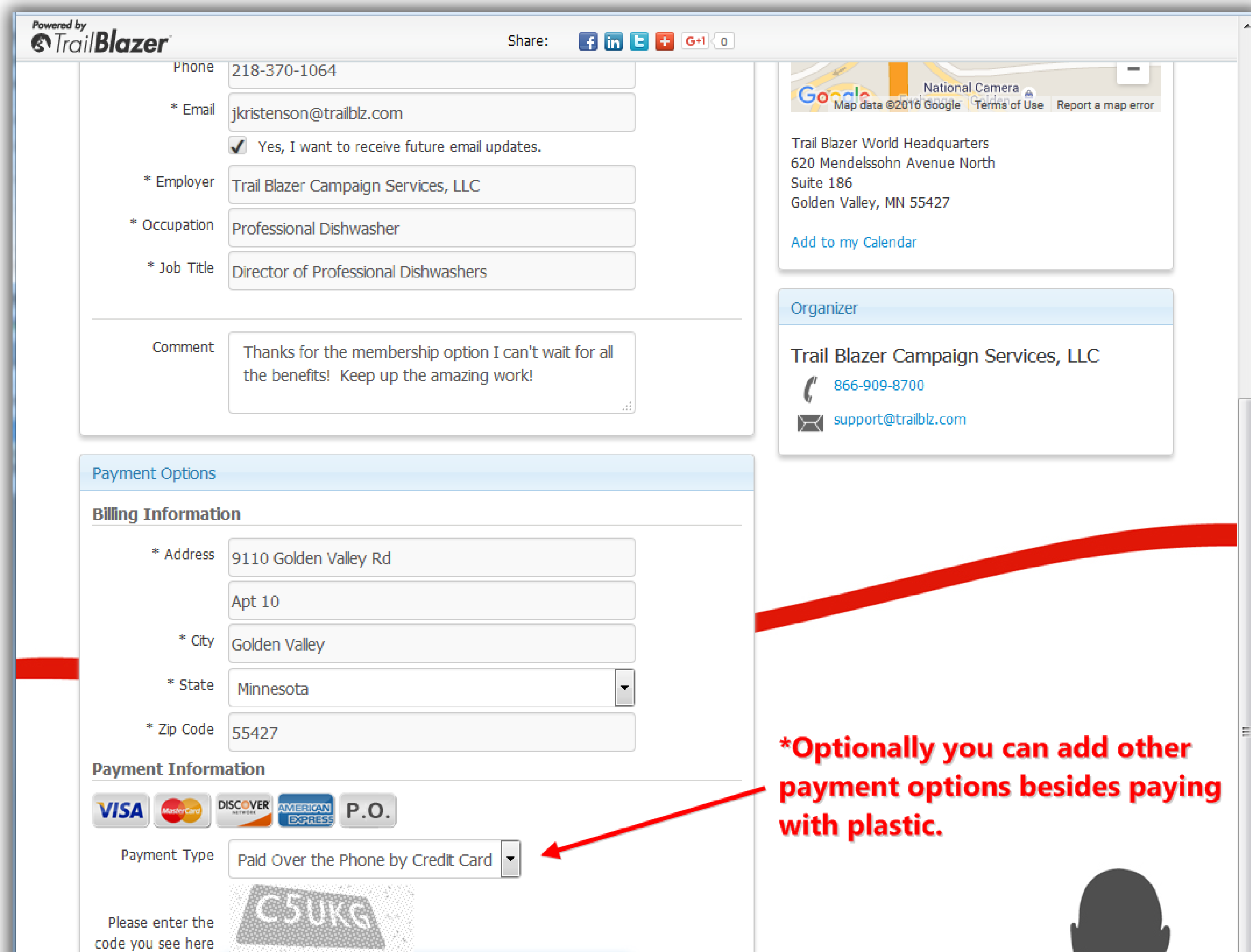
Top-Half of the checkout screen.



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

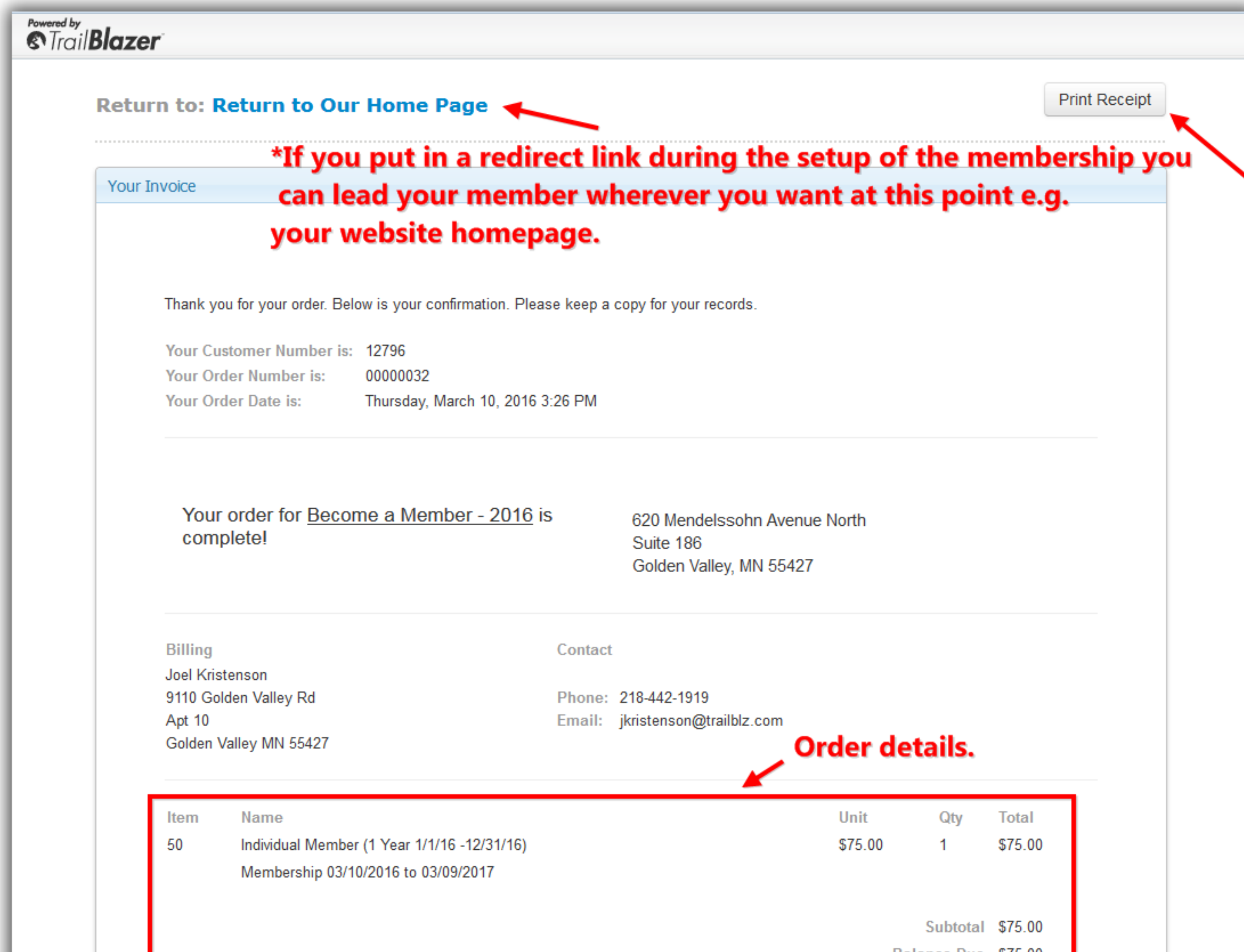
Membership Management – Creating & Selling Memberships Online and Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal Emails, and More (Nonprofit Only)

Bottom-half of the checkout screen.



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

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



***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.**

Default [Print] button.

Order details.

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 you 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.

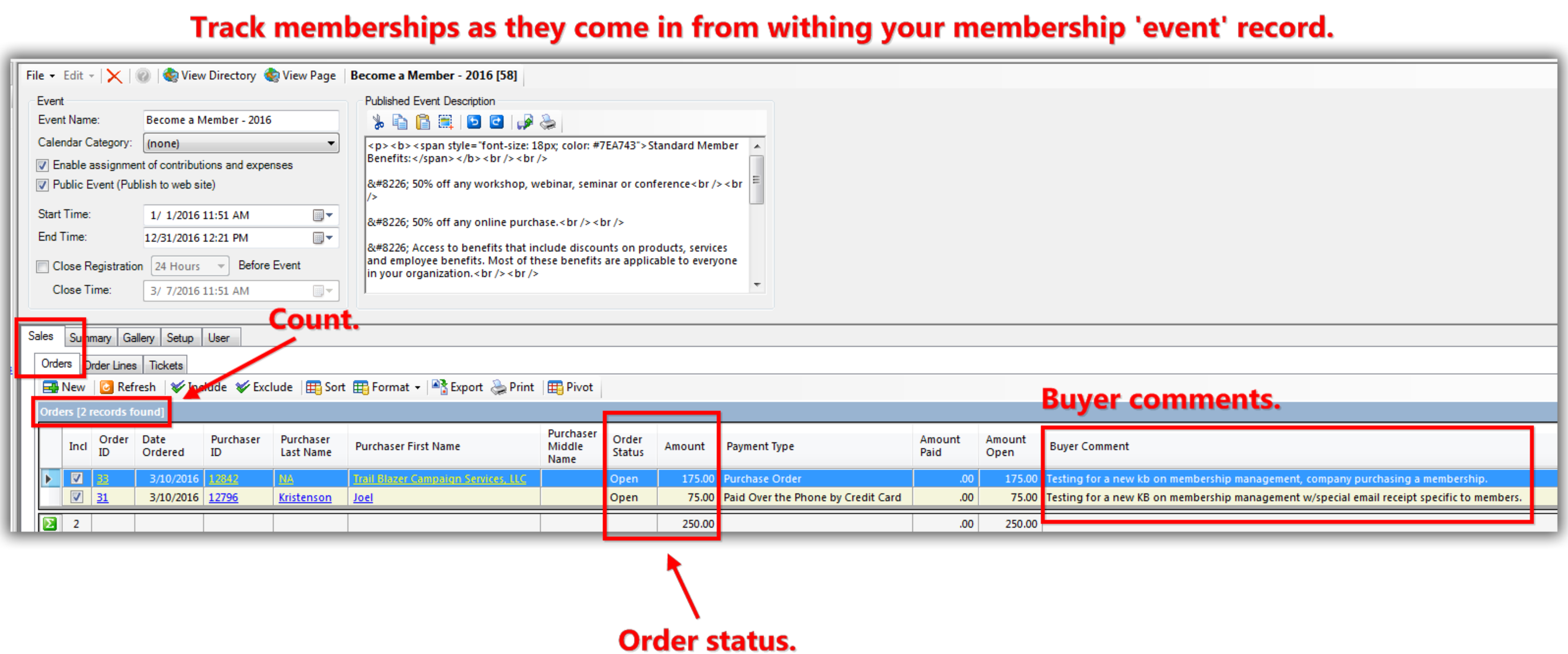
ACCOUNT SUMMARY

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

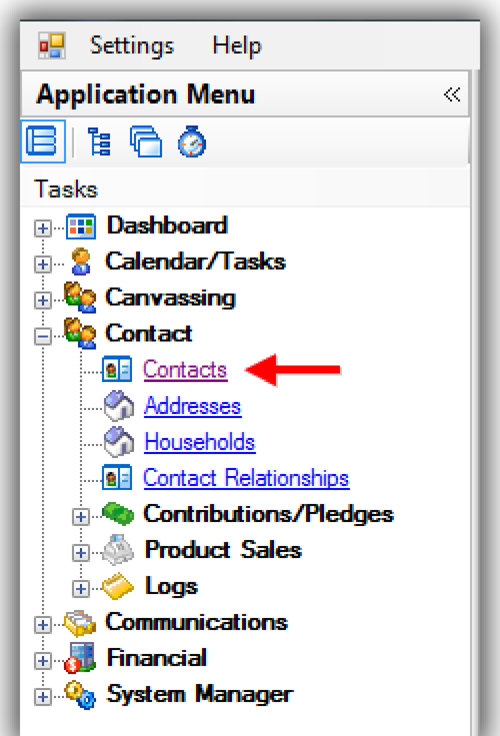
Address:	9110 Golden Valley Rd, Golden Valley, MN 55427
Phone Number:	218-370-1064
Email:	jkristenson@trailblz.com
Payment Amount:	$75.00
Payment Date:	March 10, 2016
Confirmation #:	32

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

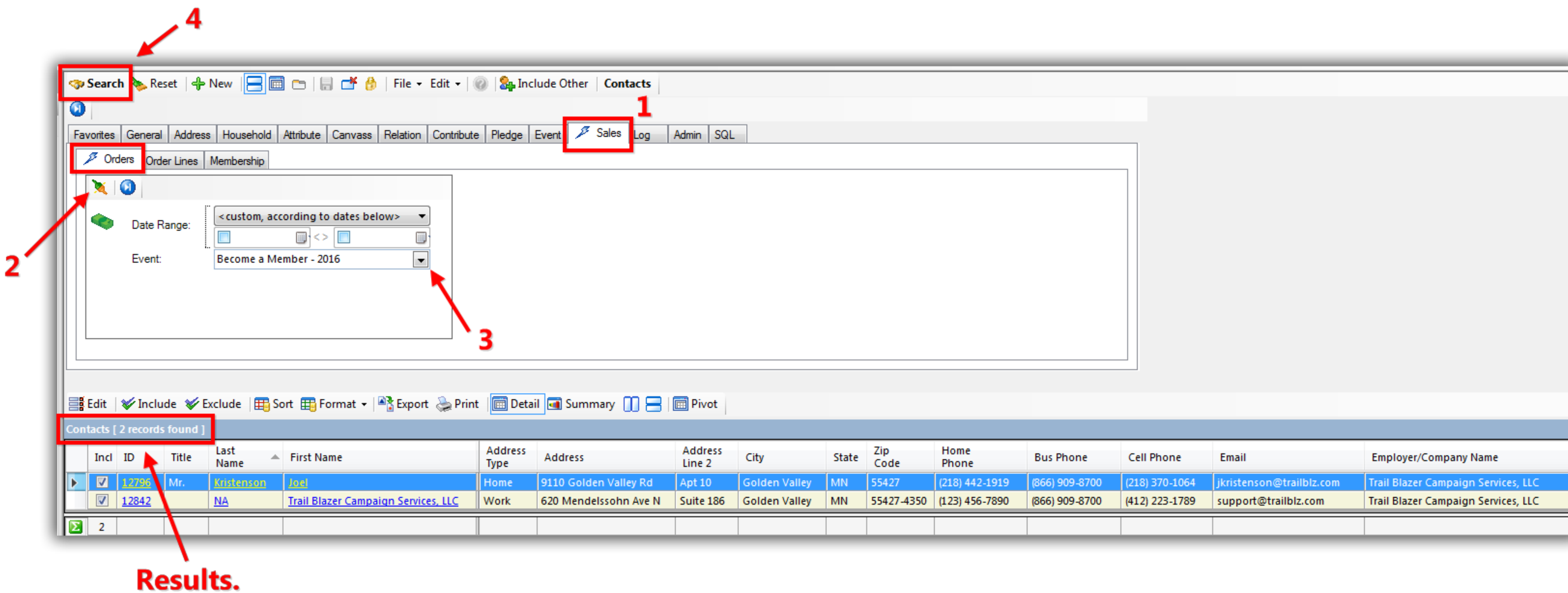


#2 – Running Search Queries in the Contacts (*Donors*) List for Current & Lapsed Members

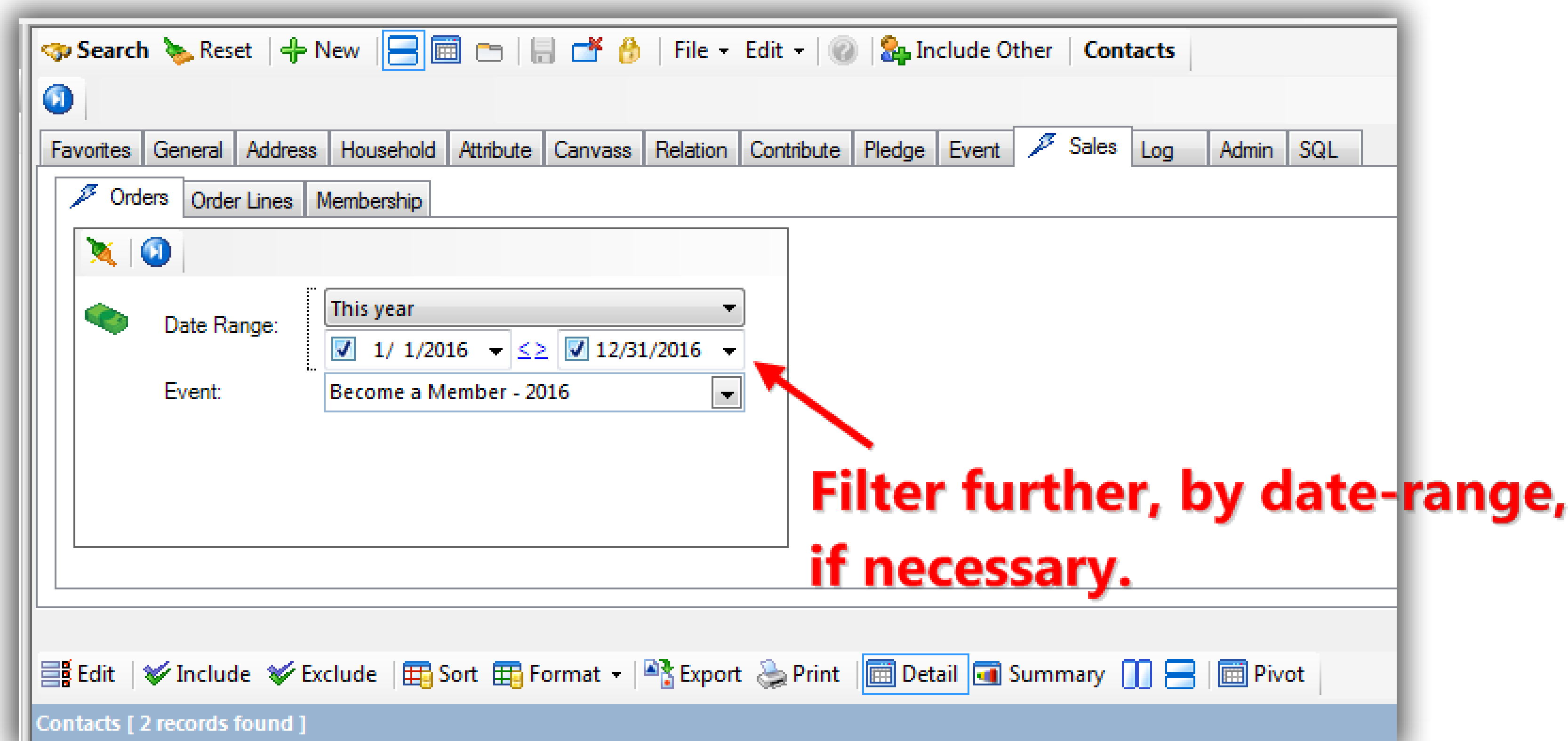
Navigate to the **Contacts** (*Donors*) list under the **Application Menu**.



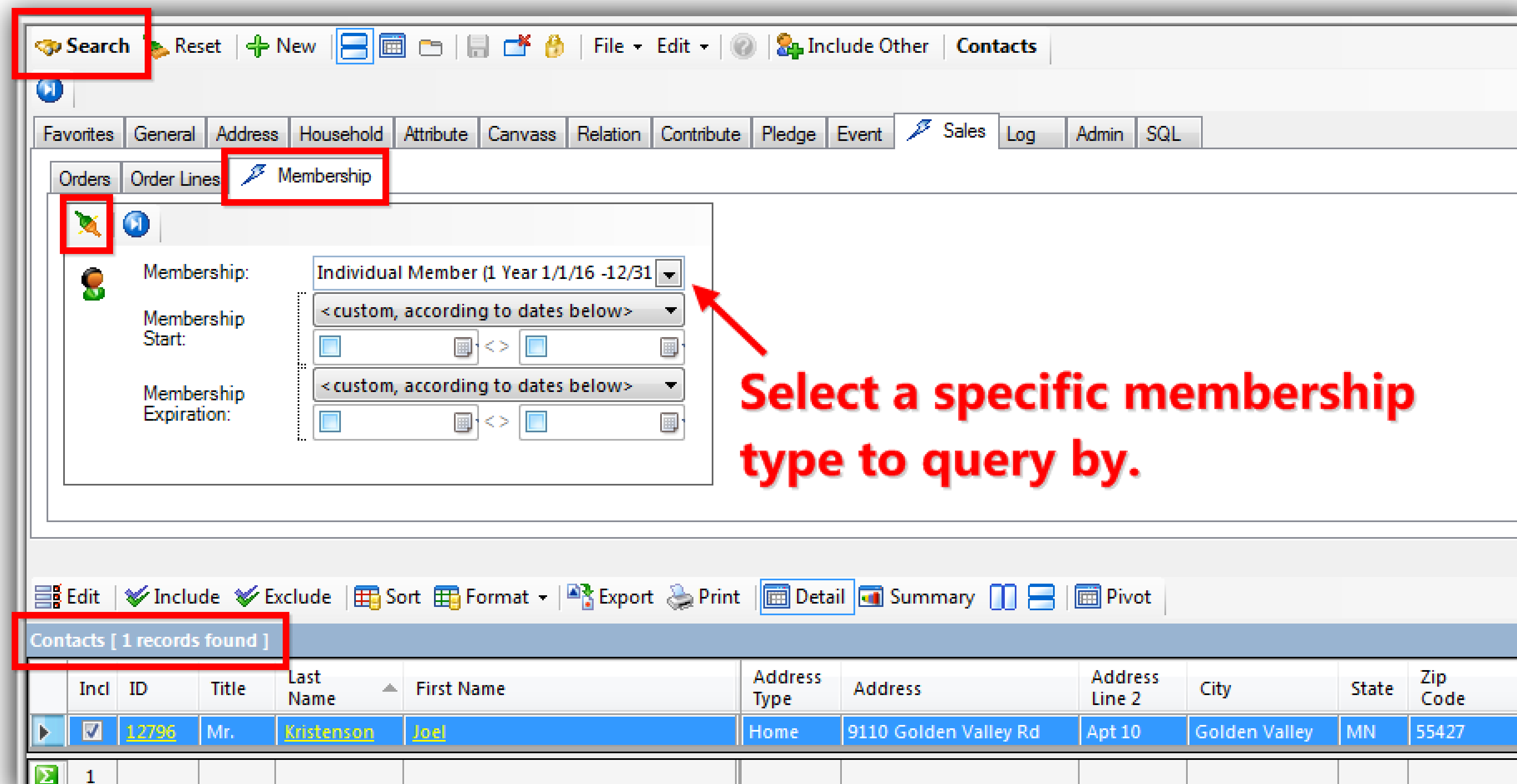
Click on the **Sales** tab > **Orders** sub-tab > **Plug** it in > Select your '**Membership Event**' > Click **[Search]**. *In my example it produced 2 members so for or my 2016 membership event.*



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.*

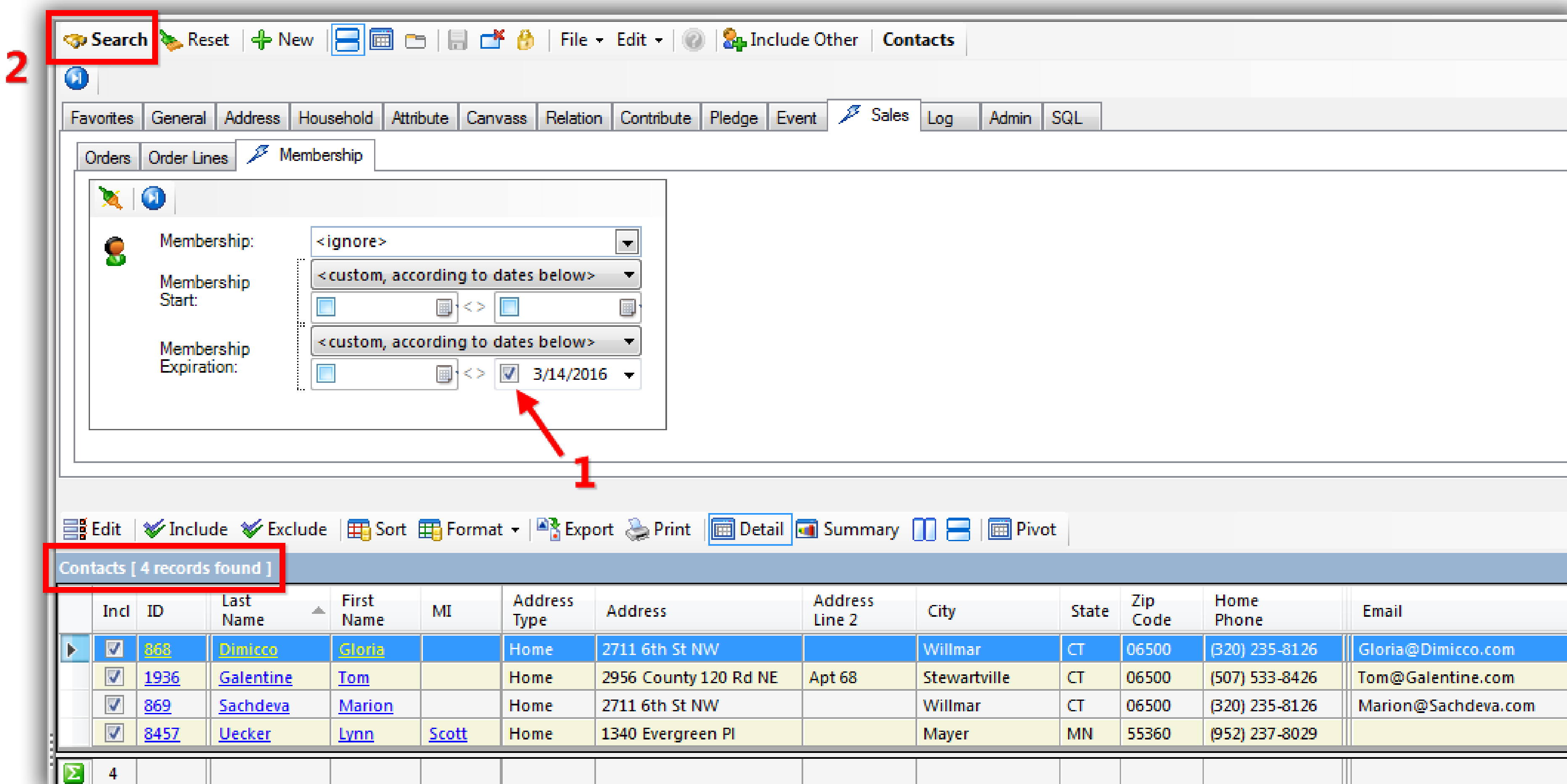


If you want to search by a specific 'Membership Type' you can select that from the **Membership** sub-tab. *In my example I queried by individual (1 year) memberships which returned a single record.*

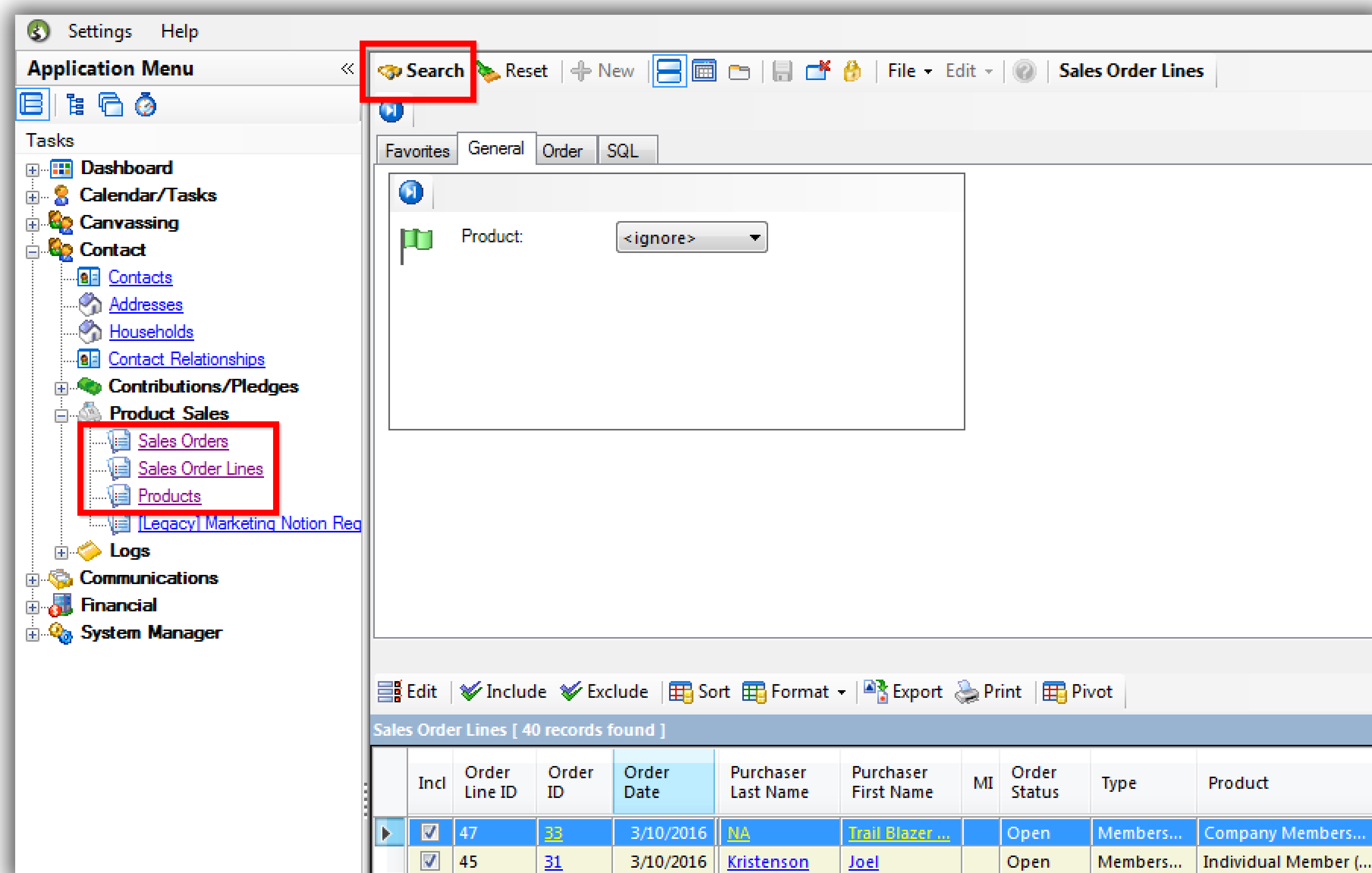

Search
Reset
New
File
Edit
Include Other
Contacts
Favorites
General
Address
Household
Attribute
Canvass
Relation
Contribute
Pledge
Event
Sales
Log
Admin
SQL
Orders
Order Lines
Membership
Membership:
Individual Member (1 Year 1/1/16 -12/31
Membership Start:
<custom, according to dates below>
Membership 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
12796
Mr.
Kristenson
Joel
Home
9110 Golden Valley Rd
Apt 10
Golden Valley
MN
55427
1

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 'todays' date.



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**:


Settings
Help
Application Menu
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
Search
Reset
New
File
Edit
Sales Order Lines
Favorites
General
Order
SQL
Product:
<ignore>
Edit
Include
Exclude
Sort
Format
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
47
33
3/10/2016
NA
Trail Blazer ...
Open
Members...
Company Members...
45
31
3/10/2016
Kristenson
Joel
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.

#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.*