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**Last Updated:** 2016-10-19

## Overview

This article walks through the steps to setup alternate **payment options** for an **event** and/or **membership** portal. By default the only option turned on is to **pay in full**, but you can offer your patrons and members the option to pay **weekly, bi-weekly, monthly, quarterly**, etc.

Here's an *example* of what your payment options could look like:

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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\$600.00 Standard Dues - \$6,000,000 – Above  
 \$650.00 Premium Dues - \$6,000,000 – Above

**Product Information**

DESCRIPTION	PRICE	QUANTITY
Monthly Magazine subscription	\$19.95	0 

**Payment Options**

Pay entire membership now (One-time)  
 Pay membership in 4 quarterly payments (Quarterly)  
 Pay membership in 12 monthly payments (Monthly)

[Order and Register](#)

**Description**

**Standard Member Benefits:**

- 50% off any AAN hosted professional development workshop, webinar, seminar or conference
- Access to benefits that include discounts on products, services and employee benefits. Most of these benefits are applicable to everyone in your organization.
- Access to our online Professional Knowledge and Tools Center
- 4 Job Postings in our online Jobs Board

**Example payment options for an event or for a membership portal.**

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

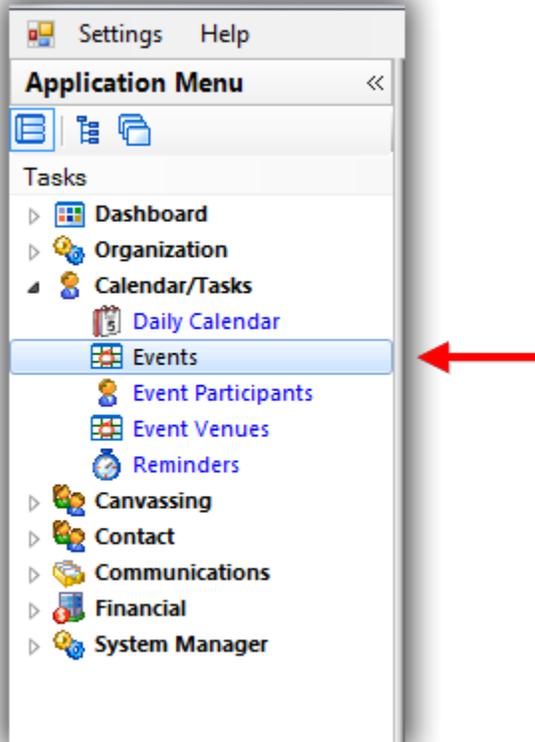
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 **Tip:** Read [these articles](#) or watch [these videos](#) to learn how to setup your **events**. Read [this article](#) to learn how to sell/track **memberships**.

### Steps

1) Navigate to the **Events** list.

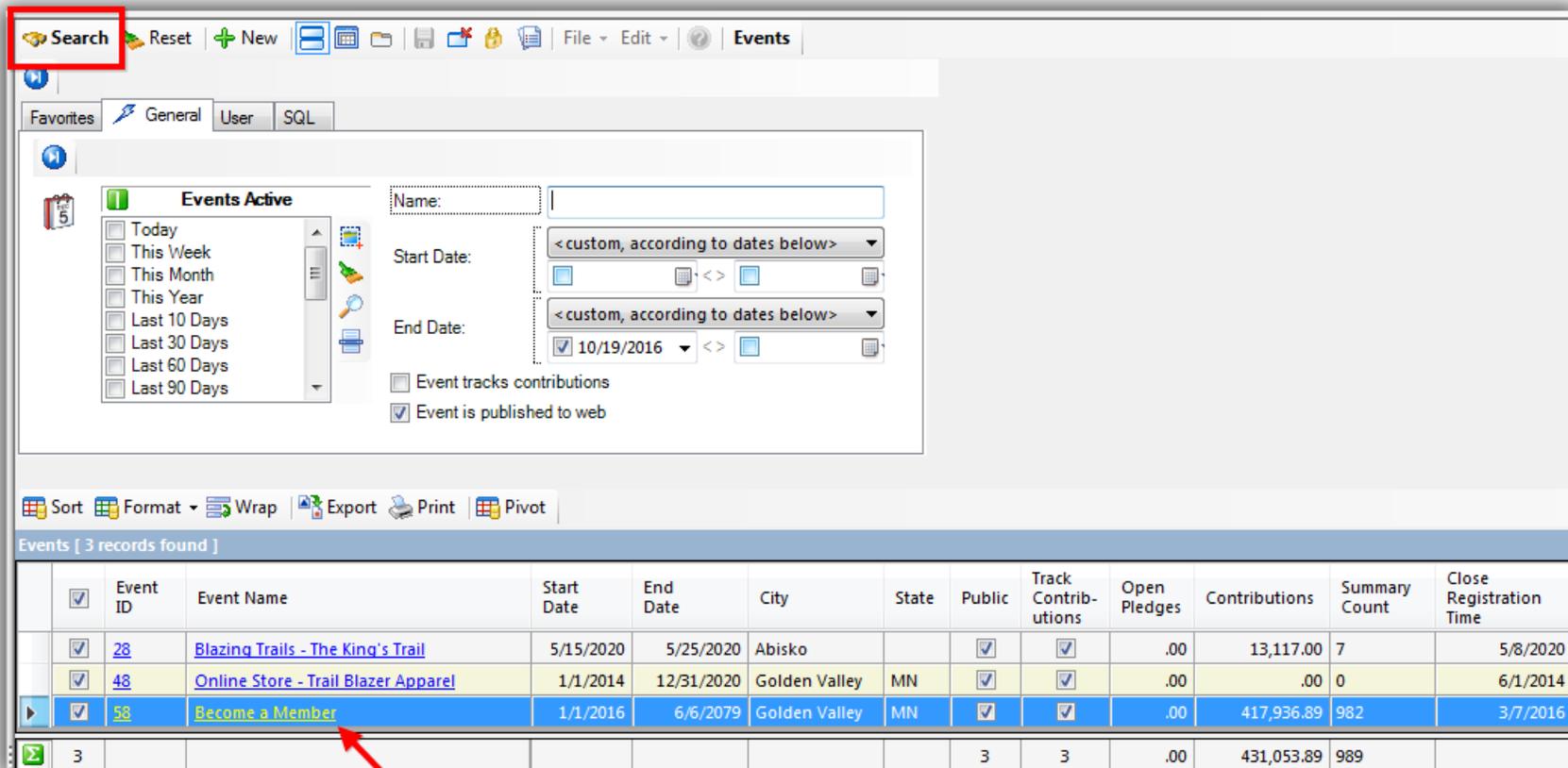
## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)



2) Search for and open the event/membership portal you want to enable alternate payments for. *In my example I used a membership 'event' called "Become a Member".*

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

**1. Search for and open the event or membership 'event' that you want to create alternate payment options for.**



The screenshot shows the TrailBlazer software interface. The 'Search' button is highlighted with a red box. The 'Events Active' section shows a list of events with filters. The table below shows three records, with the 'Become a Member' record highlighted in blue and a red arrow pointing to its name.

	Event ID	Event Name	Start Date	End Date	City	State	Public	Track Contributions	Open Pledges	Contributions	Summary Count	Close Registration Time
<input checked="" type="checkbox"/>	28	Blazing Trails - The King's Trail	5/15/2020	5/25/2020	Abisko		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	13,117.00	7	5/8/2020
<input checked="" type="checkbox"/>	48	Online Store - Trail Blazer Apparel	1/1/2014	12/31/2020	Golden Valley	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	0	6/1/2014
<input checked="" type="checkbox"/>	58	Become a Member	1/1/2016	6/6/2079	Golden Valley	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	417,936.89	982	3/7/2016
3							3	3	.00	431,053.89	989	

**2. Click on the name of the event or membership portal to open the record card.**

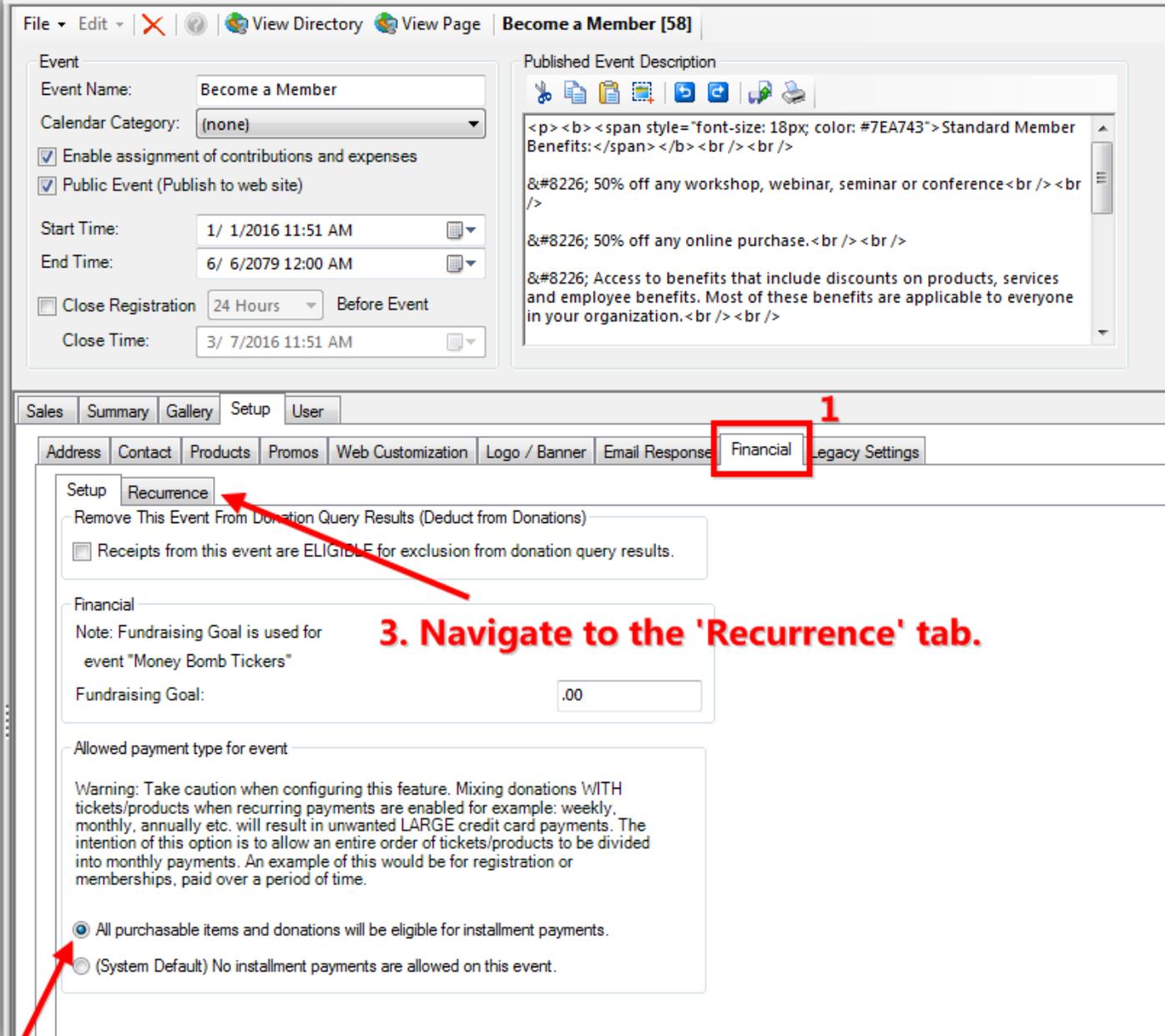
3) Navigate to the **Financial > Setup > Setup**.

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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4) Select the radio button called **'All purchasable items and donations will be eligible for installment payments'** and then navigate to the **Recurrence** tab.

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)



The screenshot shows the TrailBlazer software interface for setting up an event. The event name is "Become a Member". The "Financial" tab is selected and highlighted with a red box and the number "1". Within the "Financial" tab, the "Recurrence" sub-tab is selected and highlighted with a red arrow. A red text instruction "3. Navigate to the 'Recurrence' tab." points to the "Recurrence" sub-tab. The "Recurrence" sub-tab contains a "Fundraising Goal" field set to ".00" and a section for "Allowed payment type for event". Under this section, the radio button for "All purchasable items and donations will be eligible for installment payments." is selected, while the "(System Default) No installment payments are allowed on this event." option is unselected.

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

Event  
Event Name: Become a Member  
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: 6/ 6/2079 12:00 AM  
 Close Registration 24 Hours Before Event  
Close Time: 3/ 7/2016 11:51 AM

Published Event Description  
<p><b><span style="font-size: 18px; color: #7EA743">Standard Member Benefits:</span></b><br /><br />&#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 />

Sales Summary Gallery Setup User

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

Setup **Recurrence**

Remove This Event From Donation Query Results (Deduct from Donations)  
 Receipts from this event are ELIGIBLE for exclusion from donation query results.

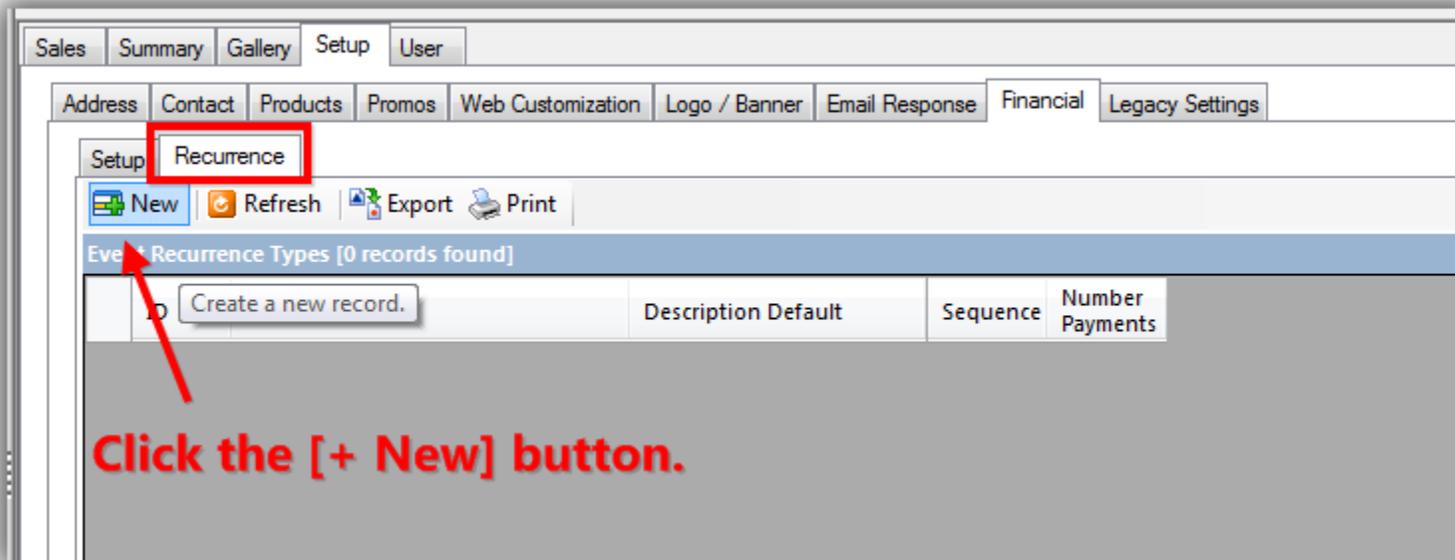
Financial  
Note: Fundraising Goal is used for event "Money Bomb Tickers"  
Fundraising Goal: .00

Allowed payment type for event  
Warning: Take caution when configuring this feature. Mixing donations WITH tickets/products when recurring payments are enabled for example: weekly, monthly, annually etc. will result in unwanted LARGE credit card payments. The intention of this option is to allow an entire order of tickets/products to be divided into monthly payments. An example of this would be for registration or memberships, paid over a period of time.  
 All purchasable items and donations will be eligible for installment payments.  
 (System Default) No installment payments are allowed on this event.

**3. Navigate to the 'Recurrence' tab.**

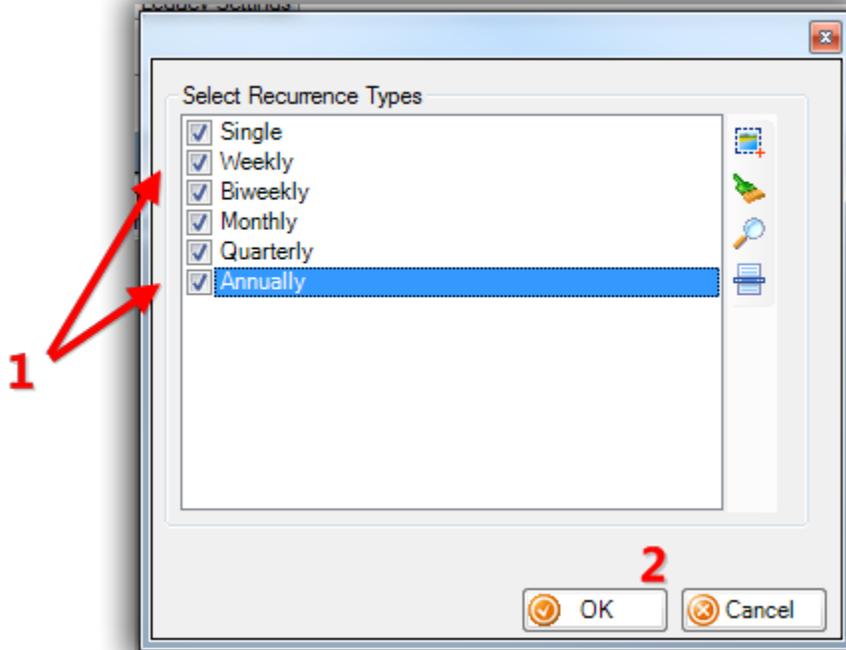
## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

5) Under the **Recurrence** tab click the **[+ New]** button.



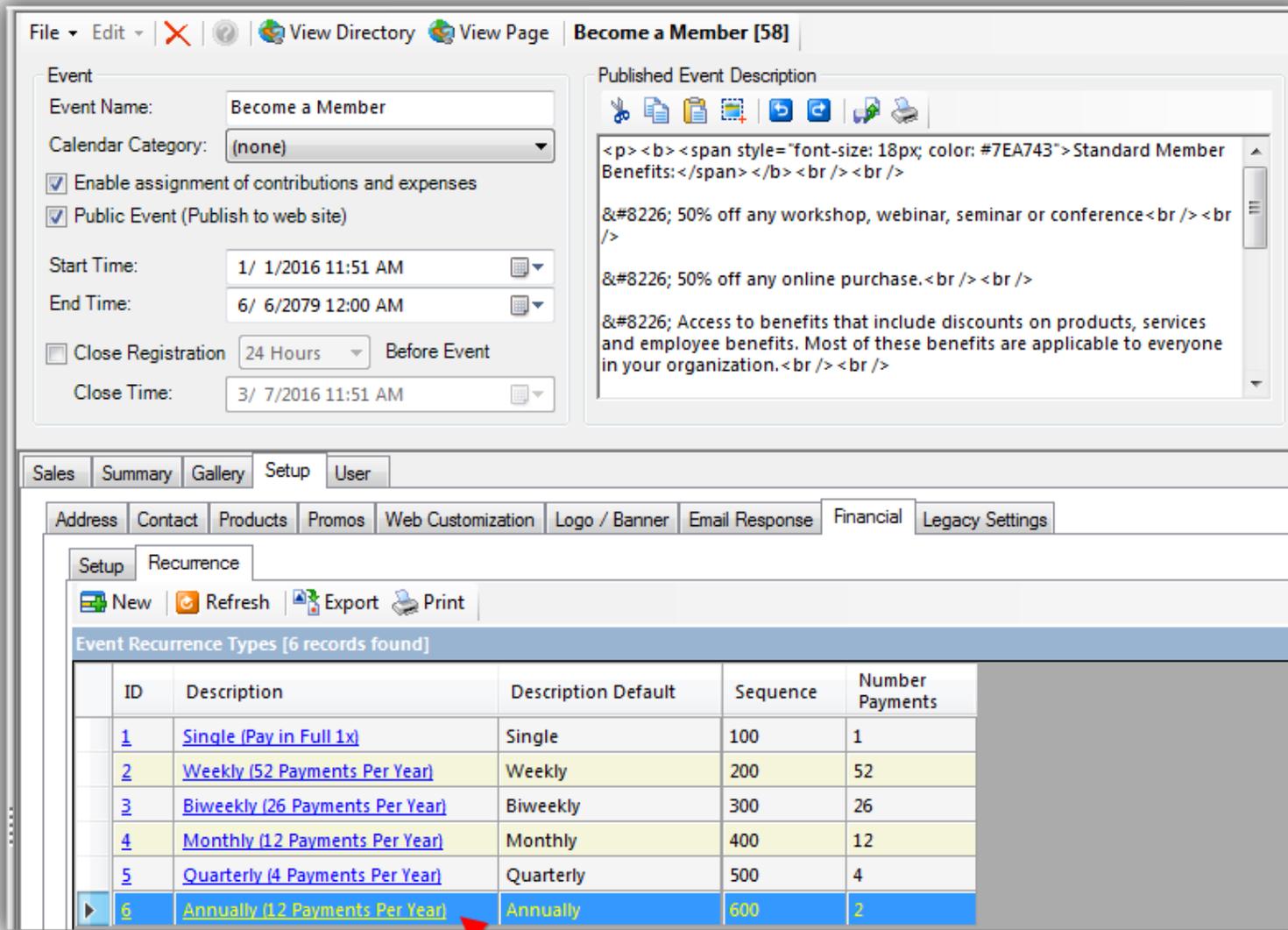
6) Check the boxes for the options you want to enable and then click **[OK]**

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)



 **Tip:** after adding the options you can open them back up and further modify the **description**. For instance you can change the default for 'Monthly' to read something like 'Monthly (12 Payments Per year)'. Here's an example:

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)



The screenshot shows the TrailBlazer software interface. At the top, there's a navigation bar with 'File', 'Edit', and 'View Directory'. Below that, the 'Event' setup section is visible, including fields for 'Event Name' (Become a Member), 'Calendar Category' (none), and checkboxes for 'Enable assignment of contributions and expenses' and 'Public Event (Publish to web site)'. There are also fields for 'Start Time', 'End Time', and 'Close Time'. To the right, the 'Published Event Description' area shows HTML code for the event description.

Below the event setup, there's a 'Setup' tab with a 'Recurrence' sub-tab. Under 'Recurrence', there's a table titled 'Event Recurrence Types [6 records found]'. The table has columns for ID, Description, Description Default, Sequence, and Number Payments. A red arrow points to the last row in the table, which is highlighted in blue.

ID	Description	Description Default	Sequence	Number Payments
1	<a href="#">Single (Pay in Full 1x)</a>	Single	100	1
2	<a href="#">Weekly (52 Payments Per Year)</a>	Weekly	200	52
3	<a href="#">Biweekly (26 Payments Per Year)</a>	Biweekly	300	26
4	<a href="#">Monthly (12 Payments Per Year)</a>	Monthly	400	12
5	<a href="#">Quarterly (4 Payments Per Year)</a>	Quarterly	500	4
6	<a href="#">Annually (12 Payments Per Year)</a>	Annually	600	2

**After adding the different payment options  
 you can open them and configure the description**

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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7) Once you're finished customizing the names and add/removing payment options click **[Save]** and then click **[View Page]**.

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

2

The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with 'File', 'Edit', and 'View Directory'. A red box highlights the 'View Page' button. Below the menu bar, the 'Event' section is visible, with 'Event Name' set to 'Become a Member'. The 'Published Event Description' field contains HTML code for member benefits. Below the event setup, there are tabs for 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. The 'Setup' tab is active, and within it, the 'Recurrence' sub-tab is selected. Below the sub-tab, there are buttons for 'New', 'Refresh', 'Export', and 'Print'. A table titled 'Event Recurrence Types [6 records found]' is displayed, showing various payment schedules.

ID	Description	Description Default	Sequence	Number Payments
1	Single	Single One Time Donation	100	1
2	Weekly	Weekly	200	52
3	Biweekly	Biweekly	300	26
4	Monthly	Monthly	400	12
5	Quarterly	Quarterly	500	4
6	Annually	Annually	600	2

1

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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8) Your new options will now display on the event/membership page. *My example is below.*

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## Become a Member

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

 Organize. Leverage. Succeed.

### Membership

- No Membership
- \$75.00 Individual Member (1 Year)
- \$100.00 Single Membership Plus (+) (1 Year)
- \$175.00 Company Membership (1 Year)
- \$300.00 Group Membership (Covers 4 People) (1 Year)
- \$5000.00 Lifetime Membership (Indv) (NO END DATE)
- \$10000.00 Lifetime Membership (Company) (NO END DATE)

### Product Information

DESCRIPTION	PRICE	QUANTITY
Test Product	Free	

\*\* Sold Out \*\*

### Payment Options

- Single (Pay in Full)
- Weekly (52 Payments Per Year)
- Biweekly (26 Payments Per Year)
- Monthly (12 Payments Per Year)
- Quarterly (4 Payments Per Year)
- Annually (12 Payments Per Year)

**Example of how the payment options look after saving the new options in the event record.**



## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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That concludes the steps. Continue reading to look through an example of what a checkout will look like for your patrons/membership as well as how the data looks after it's collected into the backend database.

Img 1 of 4 – Selecting What To Buy And Clicking [Order]

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

**Example: checking out using an 'alternate' payment options (paying in installments).**

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### Membership

- No Membership
- \$75.00 Individual Member (1 Year) **1**
- \$100.00 Single Membership Plus (+) (1 Year)
- \$175.00 Company Membership (1 Year)
- \$300.00 Group Membership (Covers 4 People) (1 Year)
- \$5000.00 Lifetime Membership (Indv) (NO END DATE)
- \$10000.00 Lifetime Membership (Company) (NO END DATE)

### Product Information

DESCRIPTION	PRICE	QUANTITY
Monthly Magazine Subscription (12 months)	\$150.00	0 <input type="text"/>

### Payment Options

VISA  MasterCard  DISCOVER  AMERICAN EXPRESS  P.O.

- Single (Pay in Full)
- Weekly (52 Payments Per Year)
- Biweekly (26 Payments Per Year)
- Monthly (12 Payments Per Year) **2**
- Quarterly (4 Payments Per Year)
- Annually (12 Payments Per Year)

**3**

### Description

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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Img 2 of 4 – Top-Half Of Checkout Page (Tip Displays About Installment Payments)

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

**This will display  
when a patron/member  
chooses to pay  
in installments.**

**The money will  
automatically  
be deducted.**

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620 Mendelssohn Avenue North  
Suite 186 Golden Valley, MN 55427

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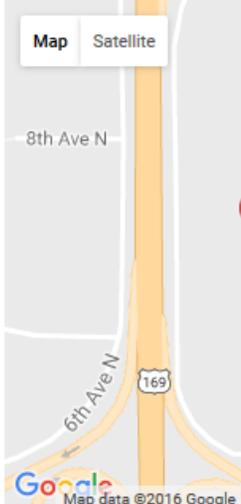
### Order Summary

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

 Your credit card will be charged \$6.25 in 12 monthly payments.

### Where

Map Satellite



Trail Blazer World Headquarters  
620 Mendelssohn Avenue N  
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

Trail Blazer Campaign

 866-909-8700

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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Img 3 of 4 – Bottom-Half Of Checkout Page (Selecting Credit Card As Payment Method)

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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### Payment Options

#### Disclaimer

**For the security conscious** - You may notice this page does not display the padlock or https in the address bar. However, the portion of the page above that captures your name and credit card information is connected by secure server to our database provider (Trail Blazer). **Their server IS securing your credit card transaction.** Depending on your browser, you can verify this by right mouse clicking on the white space inside the gray borders near your name and address. From the menu select Properties. This will display the URL: <https://www.trailblz.info/DemoNonProfit/contribute.aspx> and a button that allows you to display Trail Blazer's secure certificate information.

#### Billing Information

\* Address   
  
\* City   
\* State   
\* Zip Code

#### Payment Information

     P.O.

Payment Type   
Name on Card   
Card Number   
\* Expiration   CVV

Please enter the code you see here 

# How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

Img 4 of 4 – Backend Database View Of Purchase (Amount Paid / Amount Open)

**Event**

Event Name: Become a Member

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: 6/ 6/2019 12:00 AM

Close Registration 24 Hours Before Event

Close Time: 3/ 7/2016 11:51 AM

**Published Event Description**

```
<p><b><span style="font-size: 18px; color: #7EA743">Standard Member Benefits:</span></b><br /><br />
&#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 />
```

This will reflect how much as actually been paid so far and these counts will update automatically when the next payments come in.

Sales Summary Gallery Setup User

Orders Order Lines Tickets

New Refresh Sort Format Wrap Export Print Pivot

Orders [10 records found]

Order ID	Date Ordered	Purchaser ID	Purchaser Last Name	Purchaser First Name	Purchaser Middle Name	Order Status	Amount	Payment Type	Amount Paid	Amount Open	Promo Code	Buyer Comment
36	10/19/2016	12796	Kristenson	Joel	Anders	Completed	75.00	VISA	6.25	68.75		Testing for the KB on paying for events or memberships in 'Installments'.
53	6/22/2016	14908	Almy-Testa	Jocelyn		Open	75.00	Invoice Me	.00	75.00		
52	6/9/2016	14848	Nishiuchi	Victoria		Open	75.00	Purchase Order	.00	75.00		
51	5/13/2016	14845	Frye	Dorothy		Open	75.00	Will Be Mailing in a...	.00	75.00		
50	5/11/2016	14843	Naqvi	Al		Open	75.00	Will Be Mailing in a...	.00	75.00		
49	4/21/2016	14830	Yashinsky	Stacy		Open	75.00	Will Be Mailing in a...	.00	75.00		
42	4/1/2016	14824	Clark	Meaghan		Open	75.00	Paid Over the Phon...	.00	75.00		
39	3/16/2016	14820	Hughes	Kary		Open	175.00	Paid Over the Phon...	.00	175.00		Excited to be a member!!
33	3/10/2016	12842		Trail Blazer C...		Open	175.00	Purchase Order	.00	175.00		Testing for a new kb on membership management, company purchasing a members...
31	3/10/2016	12796	Kristenson	Joel	Anders	Open	75.00	Paid Over the Phon...	.00	75.00		Testing for a new KB on membership management w/special email receipt specific to...
10							950.00		6.25	943.75		

## How to Setup Different Payment Schedules for Events or Memberships (Ex: Monthly, Quarterly, or Bi-Weekly)

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The **related resources** below link to a wide variety of articles and videos related to the event/membership system. If you need help with any of this, don't hesitate to contact our live support.



**Trail Blazer™**

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

## Related Resources

**Webpage:** [List of Merchant Gateways that Integrate with Trail Blazer](#)

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

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

**Article:** [How to Add a New ‘Event’ to the Drop-Down List for Entering Contributions](#)

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

**Article:** [How to Create Custom Email Responders for Specific Events – New 2016 Feature Upgrade](#)

**Article:** [Membership Management – Creating & Selling Memberships Online & Manually – Tracking Renewals, Sending Out YE ‘Statements’ & Renewal E-Mails, and More \(Nonprofit Only\)](#)

**Article:** [Purchase Orders – Manually Enter an Order for Tickets, Products, or Memberships within an Event, and Record the Related Contribution Record](#)

**Article:** [Manually Assigning Tickets to Specific Event Attendees \(Ticket Holders\) after the Original Purchase Order has been Created](#)

**Article:** [Add a Background Image to an Event](#)

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

**Article:** [Display your Logo as a Redirect Link for an Event](#)

**Article:** [Events 2013 | Coupon promo code error messages](#)

**Video Playlist:** [Events](#)

**Video:** [Events 2013](#)

**Video:** [Events – Remove Person from Event](#)

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

**Video:** [Filtered Contribution Columns in Format](#)

## **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.*