



WEBINAR SERIES

Best Practices for Member Types

Presented by:
Association Technology Solutions



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- Application development to extend the functionality of iMIS
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Presented by



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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete



WEBINAR SERIES

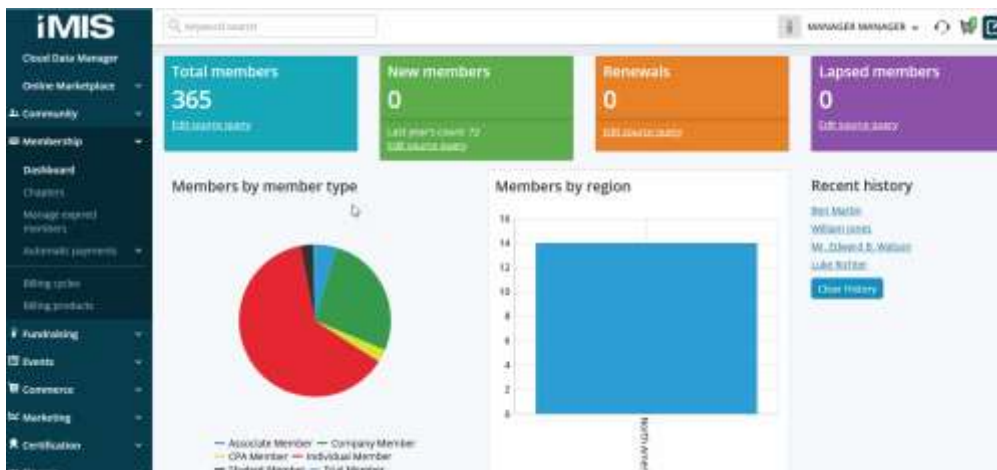
Best Practices for Member Types

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Why is this important?

- Staff need to be clear about who is a member and who is not
- Members need to be clear on what a member is
- Using the iMIS the right way means default reports, dashboards, and operations can be used out of the box
- Non-standard/non-best practice customizations to contact types (member types), billing categories, and contact status can require modifications to all reports, dashboards, and other operations forever





Members



Non-Members



Companies/Organizations/Institutions



Staff

- A membership organization has doctors that are members. All doctor members receive the same benefits. Members pay one of three prices
 - Regular \$500
 - First Year \$100
 - International \$200
- For Reporting we want to link people to companies

Customer Type	Is Member	Is Company	Billing Category	Status	Amount
M	TRUE	FALSE	REG	A	\$500
M	TRUE	FALSE	FYEAR	A	\$100
M	TRUE	FALSE	INTL	A	\$200
NM	FALSE	FALSE		A	N/A
HOSP	FALSE	TRUE		A	N/A



Company Member Example

- A membership organization has colleges that are members. All staff who work at the college receive member benefits. Colleges pay one of three prices
 - Research University \$500
 - Liberal Arts College \$300
 - Community College \$200

Customer Type	Is Member	Is Company	Billing Category	Status	Amount
M (Member College)	TRUE	TRUE	RES	A	\$500
M (Member College)	TRUE	TRUE	LA	A	\$300
M (Member College)	TRUE	TRUE	CC	A	\$100
NM (Non-Member College)	TRUE	TRUE		A	N/A
MIND (Individual at Member College)	TRUE	FALSE		A	N/A
NMIND (Individual at Non-Member College)	FALSE	FALSE		A	N/A



Customer Type (member type)

- Categories of membership that define the membership levels and amount charged for membership, or dues and subscriptions.

Billing Category

- A defined billing run set up to bill a particular group of people for a particular set of products. Different categories for the same customer type can be charged different amounts.

Contact Status

- Contact Status is user-definable but must always be defined using a code that begins with A (Active), I (Inactive), S (Suspended), or D (Marked for Deletion)

Use Customer Type for benefit differences
Use Billing Category for Pricing differences
Use Contact Status for the status of the record



Customer Types

Go to Settings>>Contacts>>Customer Types to create/edit membership types

- Code - (e.g., M,NM)
- Name (e.g., "Member")
- Organization – Yes if it is an "Organization" record, No if it is an individual record
- Member – Yes if this is a member, No if this is not a member
- IMIS documentation states

Defining a customer type

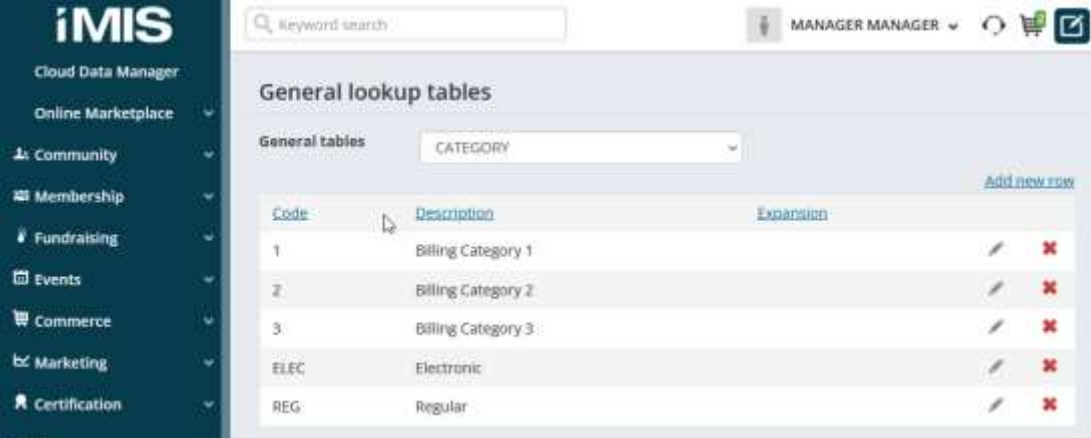
Important! Do not delete the **M** and **NM** customer types. These customer types are required for event pricing groups and various other default pricing areas throughout iMIS.

The screenshot shows the iMIS interface for managing customer types. On the left is a navigation menu with options: Cloud Data Manager, Online Marketplace, Community, Membership, Fundraising, and Events. The main content area is titled 'Customer types' and includes a search bar, a user profile for 'MANAGER MANAGER', and a table of existing customer types. A link 'Add new customer type' is visible in the top right of the table area.

Name	Code	Organization	Member	
Associate Member	A		✓	✗
Company Member	CM	✓	✓	✗
Company Nonmember	CNM	✓		✗



- Defines a "sub-category" of a contact type. This is used in billing to charge the correct amount when joining or renewing
- It is a general lookup table called "CATEGORY"
- For example
 - Customer Type = "M" (member) and billing category = "REG" (Regular Member who pays \$100) or "ELEC" who is an electronic only member and pays \$75)
 - Both are customer type "M" but they pay a different amount based on their billing category



Code	Description	Expansion
1	Billing Category 1	
2	Billing Category 2	
3	Billing Category 3	
ELEC	Electronic	
REG	Regular	

Go to Settings>>Utilities>>General Lookup Tables to create/edit Billing Categories

- Defines the "status" of the record and not the "status" of membership. It is a general lookup table called MEMBER_STATUS.
- Some legacy iMIS clients use the "S" (suspended) but we generally recommend against that.
- Generally – All records have a status of "A" (Active)
 - If someone leaves the industry and is gone forever, you can mark the status "I" (Inactive)
 - When a record needs to be deleted, the status can be change to "D" (Marked for deletion) so that you can delete the records using the iMIS tools.

Go to
Settings>>Utilities>>General
Lookup Tables to create/edit
Contact Status

The screenshot shows the iMIS Cloud Data Manager interface. On the left is a dark blue sidebar with the iMIS logo and a menu with items: Cloud Data Manager, Online Marketplace, Community, Membership, Fundraising, Events, Commerce, and Marketing. The main content area has a search bar and a user profile 'MANAGER MANAGER'. Below that, it displays 'General lookup tables' with a dropdown menu set to 'MEMBER_STATUS'. A table lists the status codes and their descriptions:

Code	Description	Expansion
A	Active	
D	Marked for deletion	
I	inactive	
S	Suspended	

How do I keep track of "Previous Members"?

- You don't need a special member type for previous members!
- Define who is a previous member
 - Someone who is not a member today
 - Someone who was a member before
- Approach
 - Each previous member has one or more dues activities with a date as to when they paid dues
 - A business object can be created of all previous members by finding Dues activities
 - The business object can now be used in IQA's or any other reports for counts, analysis, etc. (how many former members have a join date greater to or equal to 1/1/2022?)

How do I get a list of prospects?

- You do not need a separate member type for prospects
- Define who is a prospect
 - All prospects are nonmembers
 - Not all nonmembers are prospects
- Approach
 - Each prospect should have something distinguishable about them that can be derived from data in iMIS
 - Former Member
 - Conference Attendee
 - Filled out interest form
 - A business object can be created of all prospects by finding records that match YOUR criteria for a prospect.
 - The business object can now be used in IQA's or any other reports for counts, analysis, etc. (Who are the prospects who are registered for our event so we can send an invitation to a "prospective member breakfast"?)



Common Questions

What do I do at the end of the month/year for people who don't renew?

- Decide if you are going to give them member benefits after their paid through date (grace period) that is defined in Membership setup
- At the end of the term/grace period, change them to non-members
- Don't leave them members and rely on paid through date or status. That results in customizations to every report and dashboard forever



- Use to mass change member types and/or status when members do not renew.
- Recommend making records active nonmembers rather than inactive/suspended members

iMIS

Community

Membership

Dashboard

Chapters

Renewals

Manage expired members

Automatic payments

Billing cycles

Keyword search

Manage expired members

Update status or type | Logs

* Current member type: Regular Member

* Expires on or before: 12/31/2021

Include members with a blank paid-through date

Find

ID	Name	Address	Expires	Status
18794	Mr. Terry H. Ackerly	Geo International Foundation Southwest	4/30/2021	Active
18808	Mr. Benjamin O. Adams		7/30/2020	Active
12655	Mrs. Daniela P. Adams		4/30/2020	Active
18798	Mr. Leah P. Adams	Billie's Chapel	7/30/2020	Active
18888	Mr. Mark V. Adams	Arch. Int.	10/30/2021	Active

1825 items in 24 pages

New member type: Non-Member

New status: Active

Submit Cancel



Common Questions

I have company members; how do I make sure people linked to the company get member pricing?

- Flow down
- Use company pricing
- Pricing groups

Advanced

User-defined organization flow down

Organization_Demo.Staff_Size,Organization_Demo.Annual_Revenue,Name_Fin.VAT_REG_NUMBER,Name_Fin.VAT_COUNTRY,Name_Fin.USE_VAT_TAXATION

Disable auto flow down of organization address information

Use parent organization pricing



Query

- Get counts of customer type/category combinations to determine which to keep and which to change

Things to look for

- Member Types with more than 20% of your records
- Can Member Types be consolidated?
- Records that have been updated or have activity in the past 5 years



Your convinced you have to make changes. Now what do you do.



Use the Manage Expired Members tool to mass change member types



Use 3rd-party tools like:

CSI iMIS Data Management Suite

ATS Cloud Data Manager

ATS Member Type Converter



Configure renewal cycles to only allow phased out member types to renew in new member types



Questions & Answers



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