

Lumens Enhanced Membership feature provides the ability to create memberships for specific target groups you are working with, i.e., employees, clubs, OLLI program, etc. Public registration can be limited to a target group(s) on a class by class basis, and member benefits allow you to establish the number of classes a student may take or the dollar value a student may spend on classes. *If you wish to activate the Membership Feature, please contact Augusoft's Customer Support to configure your site.*

**Power Users: System Settings: Edit General Settings**

Registration Fee

Registration Fee Expires after  Days  Term # of Days

**Use Membership Benefits - optional**  Yes  No

'Membership' displays as

'Member' displays as

## Update General Settings

System Options > Power Users > General Settings > **Edit**

**Membership Benefits** - Lumens will track the classes or monies spent when members self-register or are registered by staff.

- **Use Membership Benefits:** Yes / No; Benefits piece is **optional**
- **'Membership' displays as:** enter the name you want to use for the left navigation menu; viewable by guests, students, and members. 'Membership' viewable to Staff on various internal pages as well. Alphanumeric, 25 characters
- **'Member' displays as:** references all instances of member type; field displays on Students > Members list, and Students > Student Management > under Student Type. Alphanumeric, 25 characters

**Financial Policies**

Blue type denotes required information.

Accounting codes are used for:		Required?
<input checked="" type="checkbox"/> Categories		<input type="checkbox"/>
<input checked="" type="checkbox"/> Subcategories		<input type="checkbox"/>
<input type="checkbox"/> Courses		<input type="checkbox"/>
<input type="checkbox"/> Class		<input type="checkbox"/>
<input type="checkbox"/> Locations		<input type="checkbox"/>
<input checked="" type="checkbox"/> Memberships		<input checked="" type="checkbox"/>

You may check more than one box.

## Update Financial Policies

System Option > Financial Policies > **Edit**

**Financial Policies:** Accounting codes can now be assigned to Membership Types, and may be required.

### Add Membership Type

\* denotes required information

Membership code \*

Membership name \*

Membership displays as

Member displays as

Allow Students to Purchase Membership? \*  Yes  No

Display Classes to Member Only \*  Yes  No

Membership Fee \*

Membership Fee Accounting Code \*

Membership Expires \*  Yes  No

Membership Duration \*  in Months \*

Expires on

Term   
Spring2013  
Summer2013

Requires Registration Fee? \*  Yes  No

Registration Fee Amount \*

Expires After \*  Term  Days # of Days

Maximum Number of Member(s) \*

**Membership Benefits:**

Membership Benefits Applied To  Tuition Only  Total Class Price

Member(s) May Take  classes per  Calendar Year  Term

Allow additional classes at regular price?  Yes  No

-OR-

Member(s) May Spend  cash equivalence per  Calendar Year  Term

Contact Email

Contact Phone   Ext

Description

Sort order \*

## Add Membership Type

Students > Membership Types > Add

\* denotes required information

- **Membership code\*** recognizable code for membership type
- **Membership name\*** define the name of this target group of individuals
- **Membership displays as\*** included in drop down list when this membership is purchased. alphanumeric, 25 chars.
- **Member displays as\*** references all instances of member type after purchase; alphanumeric, 25 chars.
- **Allow Students to Purchase Membership?\*** If No, staff purchase only i.e., employees.
- **Display Classes to Member Only\*** If Yes, non-members will not see class / classes.
- **Membership Fee\*** \$0.00 is acceptable
- **Membership Accounting Code\*** may be required if activated on Financial Policies; alphanumeric, 25 chars.
- **Membership Expires\*** If Yes
  - **Membership Duration\*** enter months, specific date, or term
- **Requires Registration Fee\*** If Yes
  - **Registration Fee Amount\*** enter dollar value
  - **Expires After\*** enter Term or Days and number of days
- **Maximum Number of Member(s)\***

**Membership Benefits** – Applied to either the tuition only or total class price.

**OPTIONS:** Member may...

- **Take number of classes per**
  - Calendar year
  - Term
- **Spend \$\$\$ value on classes per**
  - Calendar year
  - Term
- **Contact Email:** staff person managing membership
- **Contact Phone:** staff person phone
- **Description:** internal information
- **Sort Order:** numeric sort

### Allow additional classes a regular price? YES or NO

YES – When number of classes taken, Lumens will allow member to add classes with *Counts toward Membership Benefit = (member's membership type)* to the shopping cart at the **regular customer registration fee**.

NO – When member clicks **Add to Cart** for class with *Counts toward Membership Benefit = (member's membership type)*, Lumens displays this pop-up message: **“You have used your entire Membership Benefit”**.

**Add Membership Type**  
\*denotes required information

Membership code \*

Membership name \*

Membership displays as

Member displays as

Allow Students to Purchase Membership? \*  Yes  No

Display Classes to Member Only \*  Yes  No

Membership Fee \*

Membership Fee Accounting Code \*

Membership Expires \*  Yes  No

Membership Duration \*  in Months \*

Expires on

Term

Early Renewal Fee

Early Renewal in Months

## Membership Duration

In Months: **numeric value**

- **Early Renewal Fee** - dollar amount, can be the same or different amount than member fee.
- **Early Renewal in Months** - number of months prior to expiration date you want to alert your members that early renewal begins.

### EXAMPLE

- Duration = 12 months
- Early renewal fee = \$50.00
- Early renewal in months = 2
- Membership purchased 6/1/2013, staff can email early renewal reminder starting 4/1/2014.

**Member's expiration date is based on the membership purchase date.**

Membership Expires \*  Yes  No

Membership Duration \*  in Months \*

Expires on

Term

Notify Members (in Months)

Expires On: **specific date**

- **Notify Members in Months** - number of months prior to expiration date you want to alert your members that his / her membership is going to expire.

### EXAMPLE

- Membership Expires 6/30/2014
- Notify members in months = 2
- All members are eligible for notification on 4/30/2014.

**This membership type requires customer to purchase a new membership.**

Membership Expires \*  Yes  No

Membership Duration \*  in Months \*

Expires on

Term

Notify Members (in Months)

Term: **preferred term(s)**

- **Notify Members in Months** - number of months prior to expiration date you want to alert your members that his / her membership will end.

### EXAMPLE

- Summer Term ends 9/15/2013
- Notify members in months = 1
- All members are eligible for notification on 8/15/2013.

**This membership type requires customer to purchase a new membership.**

**\*\* All reminders are emailed through STUDENTS > RENEWAL REMINDERS**

**Course Registration Information**

Minimum Age

Maximum Age

Requires Release Form\*  Yes  No      Release Form Name

Allow Public Registration\*  Yes  No      Contact Phone

Allow Quantity Registration\*  Yes  No      Allow Info Request  Yes  No

Req Fee\* **Limit Self-Registration to Membership**

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**Counts toward Membership Benefit ?**

**APPLY BENEFITS:** At both the Course and Class levels, you have the option to...

- Limit Self-Registration for one or more membership types.
- Select one or more membership types which membership benefits can count towards.

**MEMBERSHIP TEMPLATES:** System Options > Template Management > Edit

We strongly encourage you to customize both the **Web page templates** and **Email & Print Templates** to reflect the tone of your organization.

You must be a power user to edit Email & Print templates

Name	Description	Action
<b>Web page templates</b>		
Membership Benefit - Classes Exceeded Popup For Member	This template is used to display popup when the member has exceeded the number of classes set up as membership benefits for the membership type	<a href="#">Edit</a>
Membership Benefit - Dollar Amount Exceeded Popup For Member	This template is used to display popup when the member has exceeded the dollar amount set up as membership benefit for the membership type	<a href="#">Edit</a>
Membership Benefit - Insufficient Benefit Popup For Member	This template is used to display popup when the member does not have enough membership benefits available to purchase the class	<a href="#">Edit</a>
Membership Benefit - Insufficient Benefit Popup For Staff	This template is used to display popup when the member does not have enough membership benefits available to purchase the class	<a href="#">Edit</a>
Membership Benefit - No Benefits Available Popup For Staff	This template is used to display popup when the member does not have any membership benefits available to purchase the class	<a href="#">Edit</a>
Membership Bottom	Bottom of the membership page.	<a href="#">Edit</a>
Membership Top	Top of the membership page.	<a href="#">Edit</a>
<b>Email and print templates</b>		
Member Early Renewal Reminder	Email reminder for members to renew membership before membership's early renewal deadline	<a href="#">Edit</a>
Member Renewal Reminder	Email to member indicating membership expired (NA for Lumens Standard)	<a href="#">Edit</a>