Silverbear 365

Memberships, Subscriptions and Products – Intermediate Module

Empowered Association™

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Video

Video guide available	Video URL	Last updated

CONTENTS

1. Guide Purpose and Usage 5
2. Cart Sales – (processing purchases through the CRM) 7
2.1. Invoicing and Shipping information 7
2.2. Factors affecting product options in the Cart 9
2.3. Payment Options in the Cart 10
2.4. Instalment Options 11
2.5. Selecting and editing your product(s) 12
2.6. Editing your basket 12
2.7. Membership and Subscription Cart options 13
2.8. Reporting and tracking 14
2.9. Checkout functions 14
2.10. Saving and retrieving a basket 15
2.11. Viewing and changing add-on products (e.g. for multiple memberships) 16
3. Membership Management 17
3.1. Regrading - introduction 17
3.2. Regrade immediately 17
3.3. Finance and membership implications and considerations of renewals 19
3.4. Regrade at renewal 20
3.5. Regrading process summary 21
3.6. Membership cancellations 22
3.7. Immediate cancellation 22
3.8. Implications and considerations of immediate cancellations 23
3.9. Cancelling at renewal 24
4. Renewals 27
4.1. Accessing the Bulk renewal tool 28
4.2. Scheduling the use of the Bulk Renewal Tool 28

4.3. Running a bulk renewal 28
4.4. The effects of the bulk renewal 30
4.5. Verifying the renewal processes in CRM 31
4.6. Reversing Bulk Renewed Memberships/Subscriptions 32
5. The PM Opportunity refresher process 33
6. Introduction to Lapsed memberships and the lapsing tool 35
6.1. Lapsing criteria 35
6.2. The Grace Period 35
6.3. Renewing a lapsed membership 36

1. Guide Purpose and Usage

Guide Purpose

- To continue from the Membership, Subscriptions and Products Introductory guide
- To help Silverbear clients familiarise themselves with the more detailed functionality around product sales and membership and subscription management

Included

- Product sales in the Cart
- Membership regrades and cancellations
- The Bulk Renewal Tool
- PM Refresher Service
- Lapsed memberships

Please note that the screens and layouts on your Silverbear environment are dependent on your organisation's unique configuration and business requirements, and each individual's access and security settings. Therefore, some of the screenshots and menu options you see will not exactly match up with those on your own screens

PREREQUISITE GUIDES/COURSES	RECOMMENDED PRIOR GUIDES/COURSE	RECOMMENDED FOLLOW UP COURSE(S)
Fundamentals – Introductory Module Contacts and Organisations – Introductory Module Memberships, Subscriptions and Products - Introductory Module	Finance – Introductory Module	Memberships, Subscriptions and Products: Advanced Module Finance – Advanced Module

TRAINING TASKS

You should have been advised which environment (e.g. UAT) you should use for your practice tasks. If you are unsure, please ask your internal CRM administration team who will contact Silverbear if necessary.

FEEDBACK

MEMBERSHIPS, SUBSCRIPTIONS AND PRODUCTS – INTERMEDIATE MODULE

1. Guide Purpose and Usage

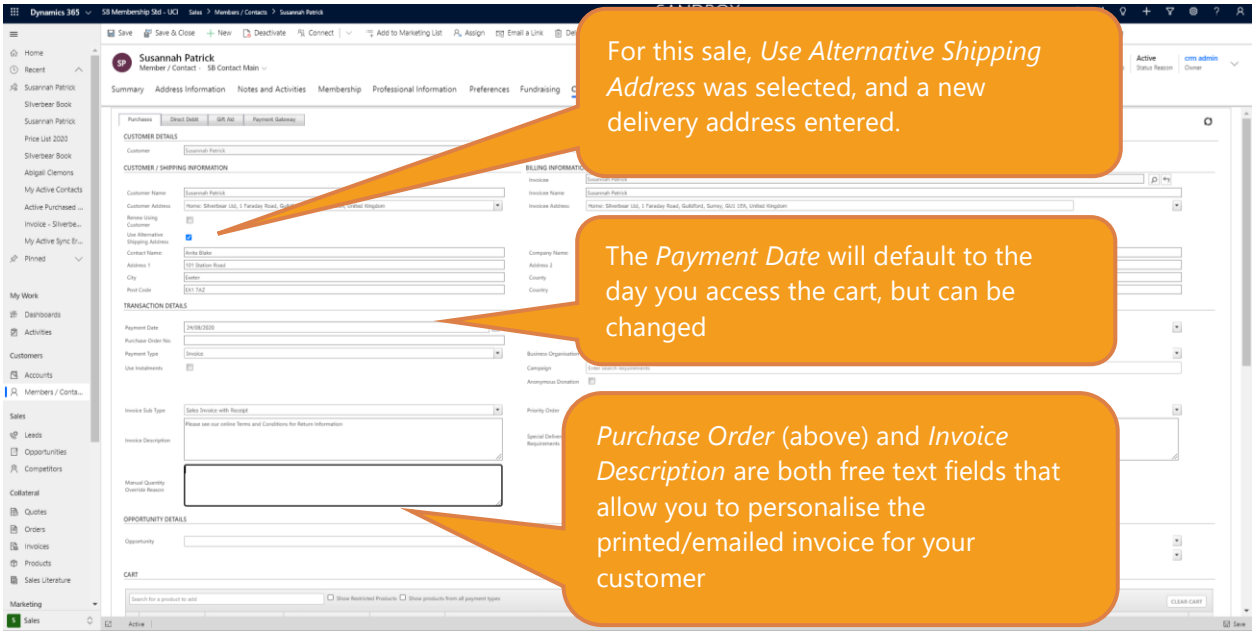
If you have any feedback on any of the instructions or screen shots please email susannah.patrick@silverbear.com

2. Cart Sales – (processing purchases through the CRM)

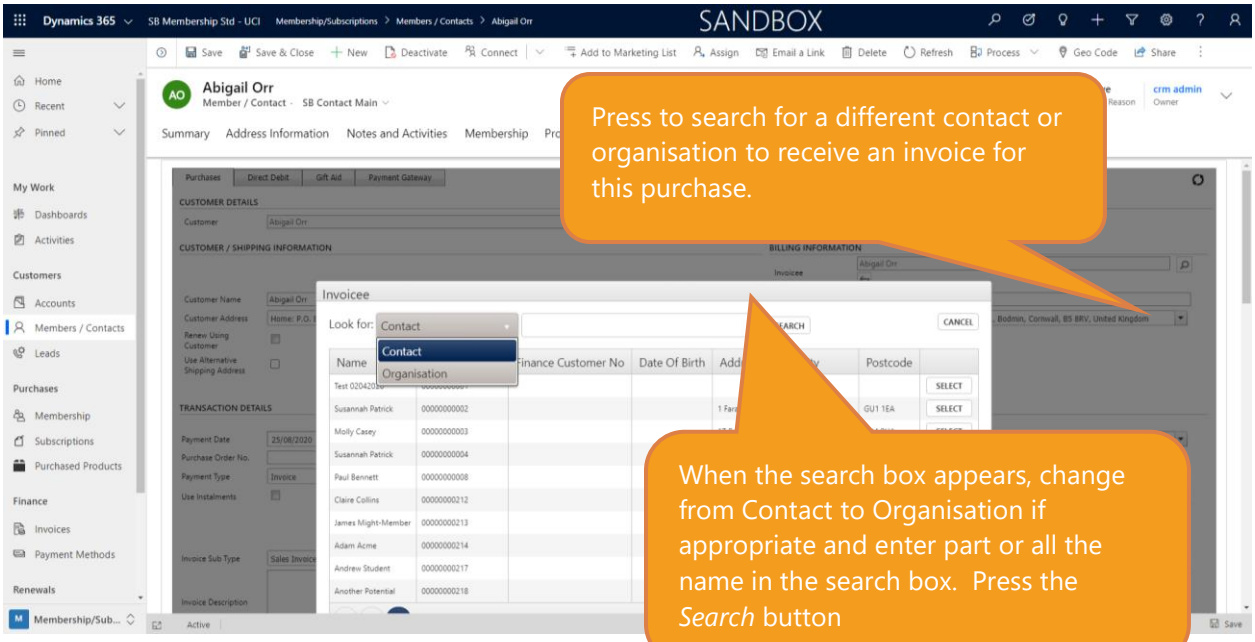
- Sales can be made to Contacts or Organisations (accounts). Throughout this guide we will use a Contact record card as a starting point but please assume that an organisation record card could be used instead for sales to businesses
- Sales to contacts made through the CRM (rather than via the portal) take place through the *Cart*. Once you have found your Contact (or Organisation) and can view their record card, choose the *Cart* tab. If you cannot see a *Cart* tab, press Related (…) and then select Cart. Please make sure your contact has at least one address on their record as an invoice address is needed in the Cart
- Basic Cart sales were covered in the Introductory Module. The following sections describe further Cart functions

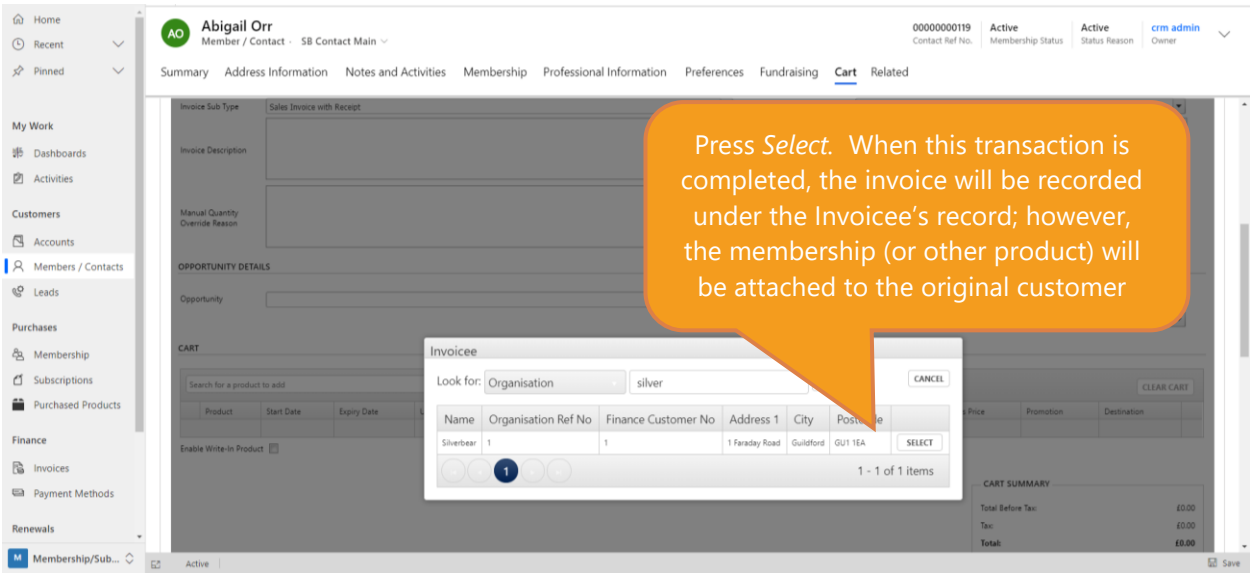
2.1. Invoicing and Shipping information

- In the Cart you can choose up to three different addresses; *Invoicee Address*, *Customer (shipping) Address* (accessed by using the drop down and choosing addresses already stored on the record card for that contact) and an alternative shipping address. Clicking on the *Alternative Shipping Address* check box gives you a chance to enter a brand-new address (useful if this is a gift purchase)
- *A Purchase Order No*. can be entered if required by your customer
- You can customise the invoice further by using the *Invoice Description* box which allows you to enter any specific text to appear on this individual invoice

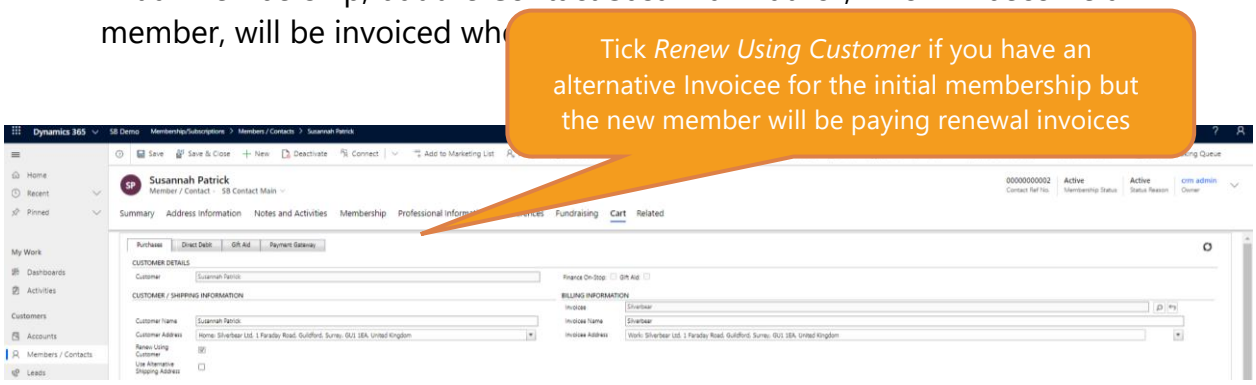


- If a different organisation or individual is paying for the purchase you can choose an alternative Invoicee. On the right-hand side of the Cart in the Billing information, press the magnifying glass next to the *Invoicee* field to bring up a search window





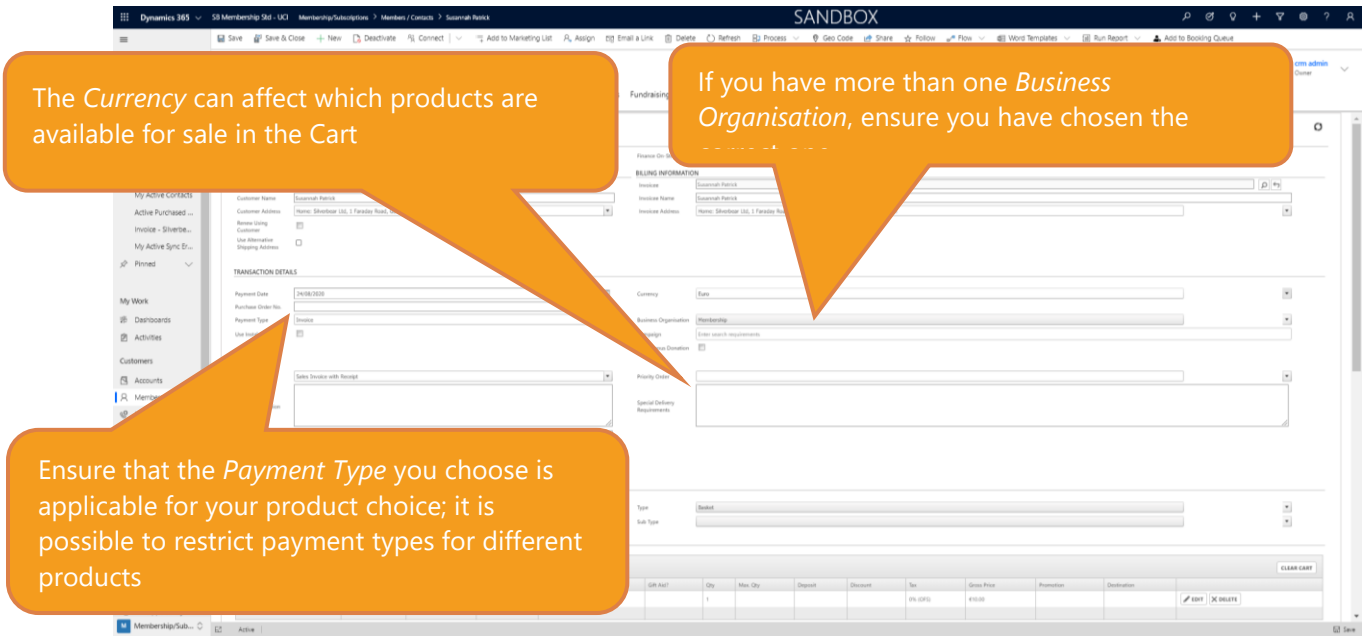
- If you are selling a renewable membership or subscription and have used an alternative invoicee, but you would like the member to receive the renewal invoice, tick the *Renew Using Customer* check box in the customer/shipping information. In the example below, Silverbear will receive the invoice for the initial membership, but the Contact Susannah Patrick, who will become a member, will be invoiced wh



2.2. Factors affecting product options in the Cart

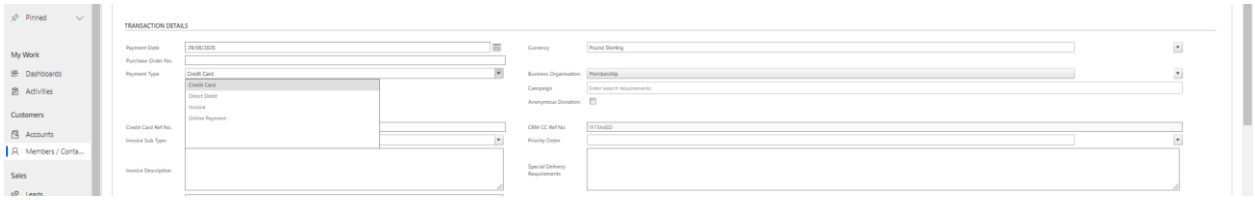
Some choices which you make in the *Customer* and *Transaction* sections will affect which products are available to select in the Cart section at the bottom of the screen.

- If you have more than one *Business Organisation* (if perhaps your CRM has been set up to manage sub organisations within your business), please make sure you have chosen the correct B*usiness Organisation* that sells the particular product your client is purchasing
- If your contact does not have an address, or has an address without a *Country* field completed you would normally see an error on the cart
- *Currency*. If you choose a currency which is not supported by your product (your product is not attached to a price list for that currency) then the product will not appear when you search for it. The currency stored on the contact record will transfer to the cart by default but can be changed
- The *Payment Type* chosen may also restrict your product choices as you may have some products which are only available through specified methods of payments. Make sure that the *Payment Type* you are choosing is valid for the product your customer is buying. Please note that you cannot mix and match payment types either in the Cart or on the portal; each transaction can be made through one payment type only. A second transaction would need to be processed if you have different products with different payment types



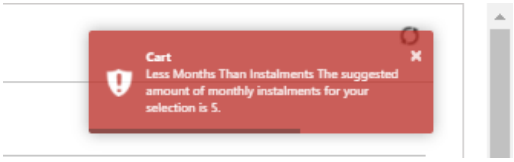
2.3. Payment Options in the Cart

- By default, there are four different payment types available to use in the Cart. Only one payment type can be used per transaction so if, for example, you have a customer who is buying a membership by Direct Debit and some products which can only be paid for on card, then you would need to carry out two separate Cart transactions
- The **Credit Card** option refers to offline payments taken using a pdq machine in your organisation. Using this option will trigger the credit card reference field but will not trigger your online payment gateway
- **Direct Debit** – If you have a Direct Debit instruction for your customer you will be able to process a Direct Debit transaction (which will create the necessary contracts and DD payments) if the product you are purchasing allows Direct Debit as a method of payment. For more information on creating Direct Debits please refer to the Finance module
- **Invoice** – if this is selected, you are requesting your client pay later after receiving an invoice. Further action will need to be taken later to process the payment when it is received
- **Online payment** – choosing this will launch your online credit card payment portal when you checkout the transaction



2.4. Instalment Options

- Direct Debit purchases can have instalment options (if this is an option your organisation offers)
- Annual (a single payment) is chosen by default, or you can choose monthly or quarterly. Monthly instalment values must be set up at the product setup level for this functionality to work – please see the Advanced Module for product setup information
- If you choose monthly or quarterly instalments, please note that the monthly instalment value will be shown in the *Unit Price* field in the Cart section. However, after checking out the correct quarterly value will be shown on the invoice
- If you have a fixed term membership and there are only a few months left for it to run and you wish to choose quarterly or monthly instalments you may need to adjust the number of instalments to reflect this so that a membership is not been paid for after it ends. An error will appear if there is a conflict between the number of months remaining and the instalment value on a monthly instalment plan. Please note that this warning does not appear on a quarterly instalment; the number of instalments will be changed automatically when you check out

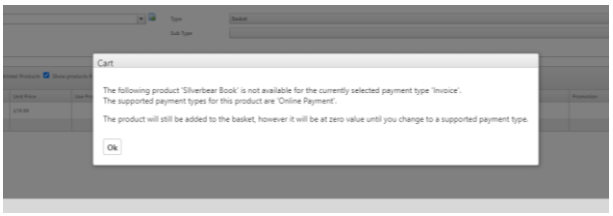


- The overall price of a membership paid for by monthly or quarterly instalments may be different to the annual price, as the monthly instalment price is set up separately rather than being calculated by the Cart. If there is no monthly price set up and you choose one of these instalment methods, then the price will show as £0
- To select instalments, choose an applicable *Payment Type* and tick the *Use Instalments* check box
- Change the *Instalment Plan* to **Monthly** or **Quarterly**
- If necessary, change the number of *Instalments*

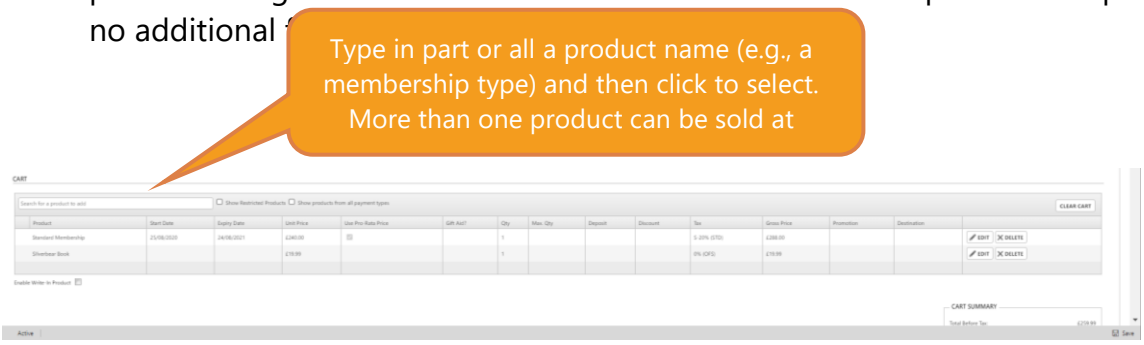
- After selecting the product check that the *Gross Price* is correct before completing the transaction

2.5. Selecting and editing your product(s)

- To select the products, scroll down to the CART section at the bottom of the screen and type in the name or part of the name of the goods or services you are selling (e.g. typing Mem will find products with the word Membership in them)
- If you are unable to see your product, please refer to the section "Factors affecting product options in the Cart" above
- Ticking *Show products from all payment types* will enable you to view any products even if they are not payable by your selected *Payment Type*, but you will receive a message as below if you select them. This can be helpful a helpful step however if you are trying to work out why a particular product is not showing

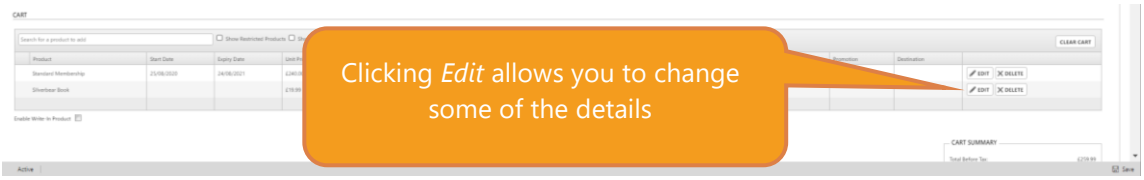


- If your product is not shown (and your business practices allow it), ticking "enable write in Product" will allow you to manually enter the details of the product being sold. This should not be used for memberships or subscriptions as no additional



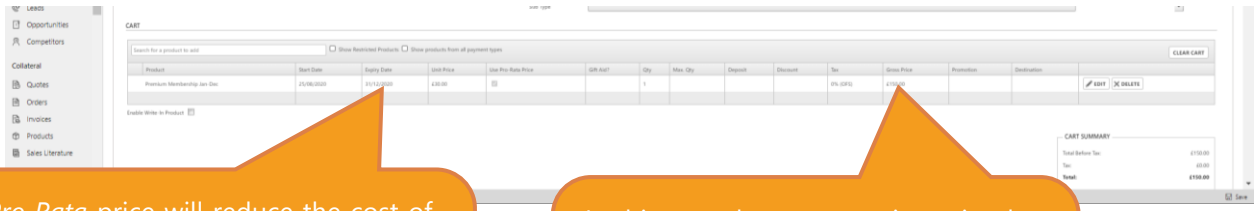
2.6. Editing your basket

- Press the Edit button at the end of the line to change certain aspects of the transaction.
- You can only change a single line at once.



2.7. Membership and Subscription Cart options

- Membership and Subscriptions run for a specified period, either a number of months or for a fixed term period (e.g., January to December), this is defined in the product setup but it is possible to change the start date and end date of the membership or subscription in the cart
- If a membership is running on a fixed term basis e.g., January to December, but the purchase is being made part way through the year your organisation may offer a discounted price to reflect the price for the actual months of membership. If that is the case, the *Pro Rata* box should be ticked. If the full price of the membership is due regardless of when in the year it is bought it should be left unchecked
- If monthly or quarterly instalments are chosen, the Unit Price will reflect the instalment price, and this will be multiplied by the number of instalments to give the Gross Price. In the example below the membership runs from January to December but is being purchased part way through the year with only 5 months remaining, *Pro Rata* is ticked so the price is updated to reflect 5 months' worth of instalments



2.8. Reporting and tracking

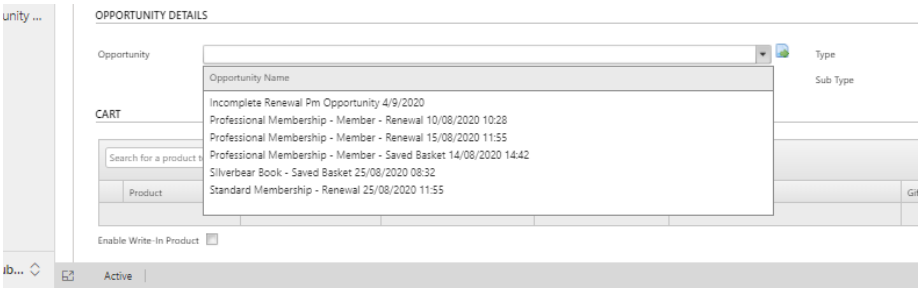
- In the *Transaction Details* section of the Cart screen, you can choose a *Campaign* to attach to this purchase (if a Campaign has been created in your CRM). This will allow you to track the results of your marketing activities (e.g., a campaign to attract new members)
- If you have created a unique discount code for a promotion or offer, then selecting that in the Cart section at the bottom of the screen will allow you to monitor the discount usage
- The *Destination* field on the Cart can be changed if you want to specify financial coding for this transaction (the default destination code for the product(s) will be automatically selected)

2.9. Checkout functions

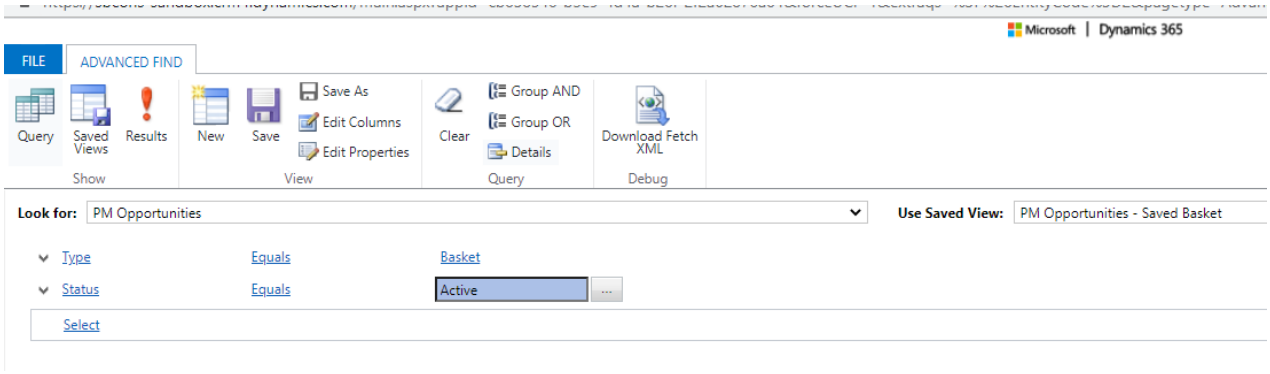
- Your Payment type will determine what happens when you press *Checkout*. If you have selected **Invoice** then *Checkout* will complete the transaction and email an invoice to the customer (assuming your Silverbear CRM has been configured to do so), leaving a payment in a pending state ready for money to be taken at a later date (please see the Finance modules for details on how to clear invoices)
- If you chose **Direct Debit** a DD Contract will be created (and in a typical configuration it would be emailed), plus other Direct Debit functionality will take place
- If **Credit Card** has been selected a *Credit Card Reference* will need to be entered – an online payment gateway will not be triggered as this method refers to credit card payments taken on a pdq machine. The transaction will complete and show as fully paid and in a typical configuration a confirmation/receipt would be emailed
- If **Online Payment** is selected, then the Payment Gateway screen with invoicing and payment details will be displayed. Press *Proceed* to launch your online Payment provider portal and enter the credit card details. Once that is completed, the transaction will be finalised, and the payment shown as received and any pre-set confirmation emails will be sent from your CRM

2.10. Saving and retrieving a basket

- If your customer is not ready to complete the transaction at this stage, you can *Save* the basket
- To retrieve a saved basket, open the Cart for your contact or organisation and scroll down to the *Opportunity* section
- Clicking the drop-down arrow at the end of the *Opportunity* field will bring up any saved baskets as well as renewal pm opportunities (these are covered later in this module). Choose the relevant basket and then press the green arrow to "load" the details back into the Cart

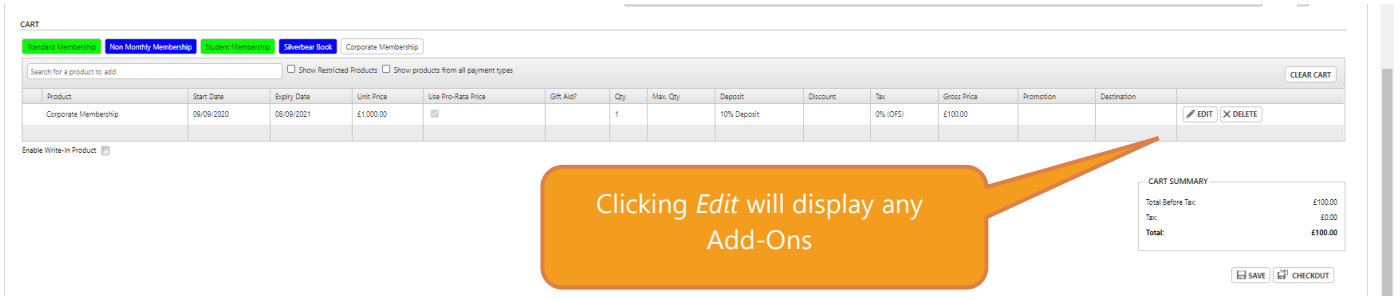


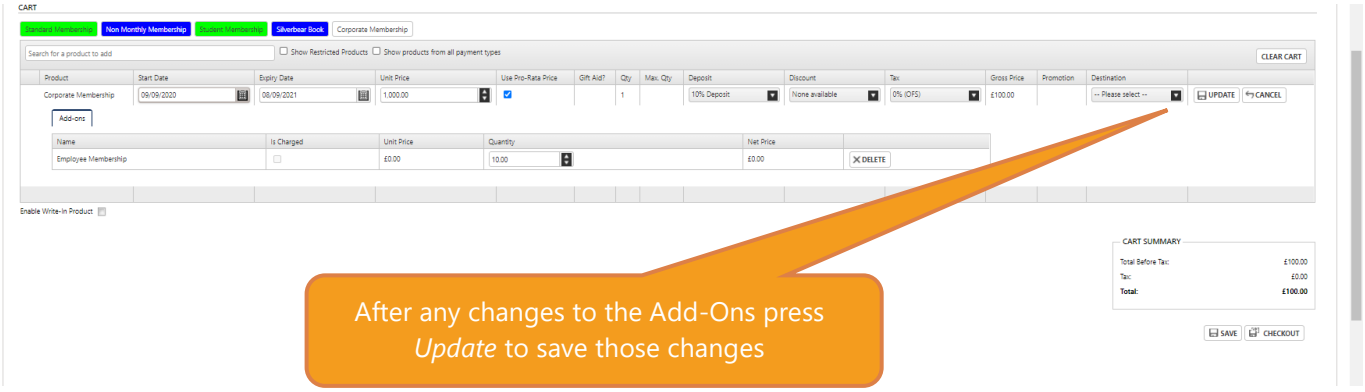
- Alternatively, from the *Contact* record card, press *Related* and then *PM Opportunities* to see all PM opportunity renewals and saved baskets. Choose the relevant basket and select *Related* and *Cart*. You can then checkout or edit/add to the basket
- If you are tracking incomplete baskets for sales monitoring/development purchases, you may want to create an advanced find like the one below which will display any incomplete sales



2.11. Viewing and changing add-on products (e.g., for multiple memberships)

If the product you are selling has additional items attached – for example if it is a Corporate Membership which is packaged together with individual memberships, those will only appear after clicking on the *Edit* button in the Cart section. This allows you to see the additional item(s) and if necessary, make changes to the *Quantity*. Press *Update* after making any changes. Further information on administrating these types of memberships is covered in the Advanced Module





3. Membership Management

The Silverbear system (in a typical configuration) will allow you to manually regrade (change the membership type), cancel or renew single memberships. Individual renewals were covered in the Introductory Module of this course. Bulk renewals are carried out through a separate mechanism and this is covered later in the chapter. The next sections cover regrading and cancellations

3.1. Regrading - introduction

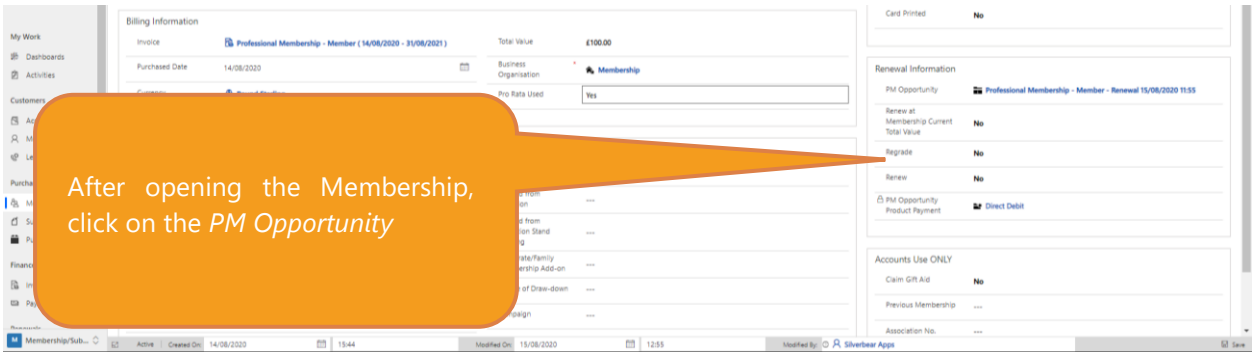
The term regrade refers to the changing of one membership type to another. This can be done part way through a membership, or at the point of renewal. For example, if a client's membership runs from 1st May to end of April and they contact you in October to change their membership to a premium level, there may be two options for that client

- Regrade now. Change the membership level immediately. The membership will continue to the previous renewal date (e.g. the end of April) but at the new membership level or type, and then will renew at this new membership type
- Regrade at the time of renewal. The membership will remain at its current level/type until the standard renewal time in April. At that point their membership (if renewed) will switch to the new membership type

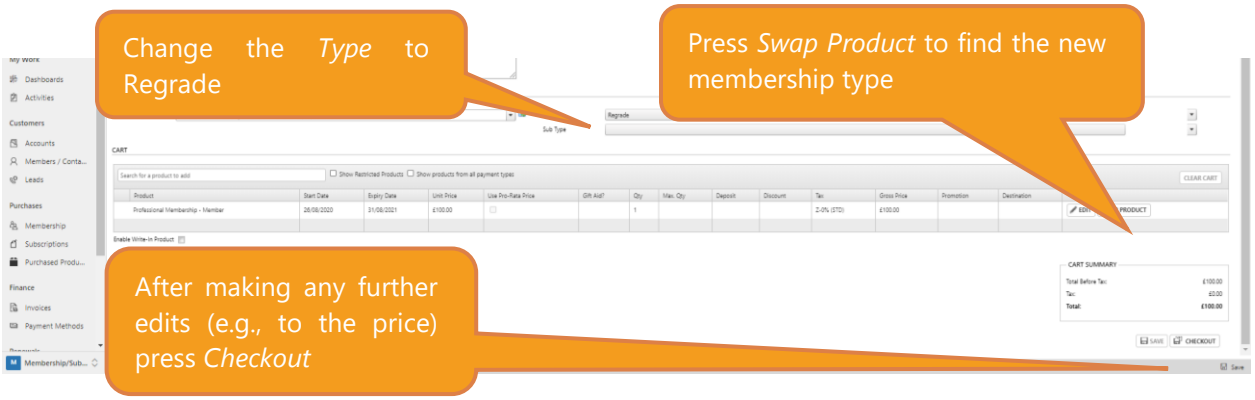
If your customer wishes to end their existing membership completely and take out a new twelve-month membership, then cancelling the current one and selling a new membership may be more appropriate. Please see the cancellation section

3.2. Regrade immediately

- The first step is to access the PM Opportunity for the membership which is being regraded. *PM Opportunities* (as mentioned in the Introductory Guide) are records in which are held details of the product a customer will have if they renew their current membership or subscription. This record can be used to process the renewal, or in this case a regrade
- PM opportunities can be accessed in a couple of different ways. One option is to find the membership that the contact wishes to change. If you have a membership tab on your contact (or organisation) record card use that as your starting point. If you do not have a Membership tab, click *Related* and then *Memberships*. Find the membership and click on it
- Go to the section labelled *Renewal Information* and click the blue hyperlink which appears in the *PM Opportunity* field



- You will now be in the *PM Opportunity* record. Do not make changes directly in this record; instead click on *Related* and then *Cart*.
- The Cart will now be loaded with the PM Opportunity details shown.
- The alternative method to that explained above is to access the Contact or Organisation that is renewing, click Related and then *PM Opportunities* and select the correct *PM Opportunity* if there is more than one
- Once in the cart, you can also change the Payment Type, if the customer is paying for their new membership by a different method.
- Scroll down to the *Opportunity Details* section and change the *Type* to Regrade
- Press the *SWAP PRODUCT* button on the line of the membership and search for the new membership type
- You may need to change the price (see implications and considerations below)
- Once you have finished editing, press *Checkout*.

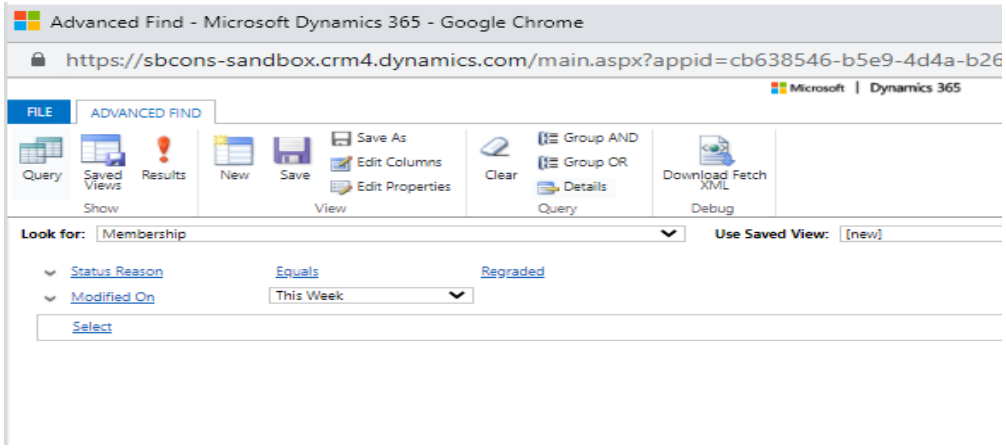


- It may be helpful to check the membership information for your contact; they should have an inactive membership (the original membership type) with a

Status Reason of Regraded and a new active membership of the new membership type

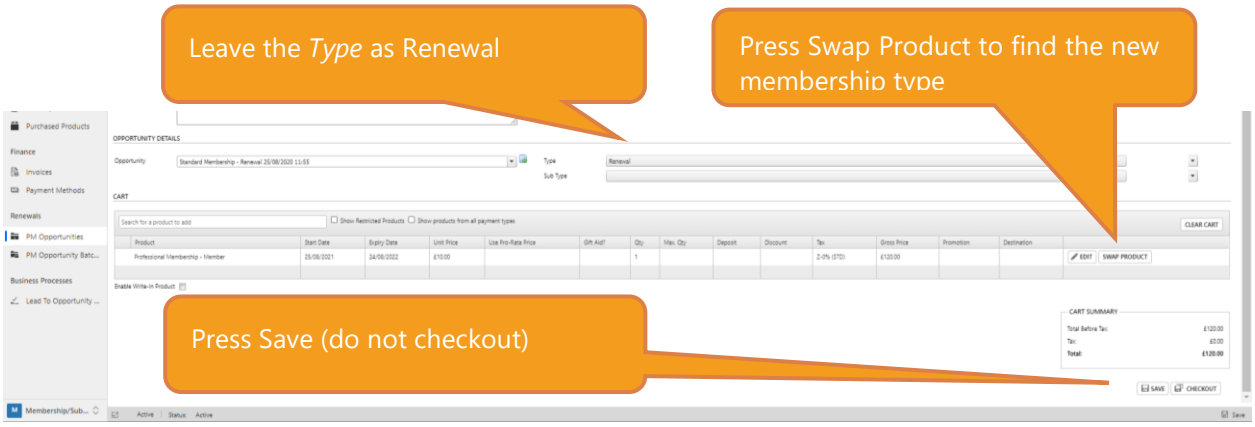
3.3. Finance and membership implications and considerations of renewals

- When regrading the cart will apply the original membership dates to the new product. If your original membership for your customer ran from 1st July to 30th June then regrading to a different membership type will keep those original dates, even if that new product normally has a different membership period. If you want to change the dates you would need to do that in the Cart section.
- The standard price of the new membership type will be applied. If you are discounting or making it free of charge because the customer has already paid for a membership, you would need to adjust the price manually using the *Edit* function.
- If the client is moving from a more expensive membership to a cheaper one and you need to create a refund you would need to create a credit note for the original invoice and refund. Credit notes and refunds are covered in the Finance Modules
- If your customer has an outstanding invoice for the original product which has not been paid this could be cancelled or written off, or have a credit note applied, whichever is appropriate for your business practices. please see the finance guides
- If your customer was paying by direct debit, the original direct debit contract will need to be cancelled – please see the finance guides
- There may be other implications/processes – please check your internal practices for any additional tasks required
- You may find it helpful to have a saved view (perhaps on a dashboard) allowing you to monitor regrades to ensure that relevant finance functions take place. The advanced find below searches for any regrades on memberships, with a modified date of this week



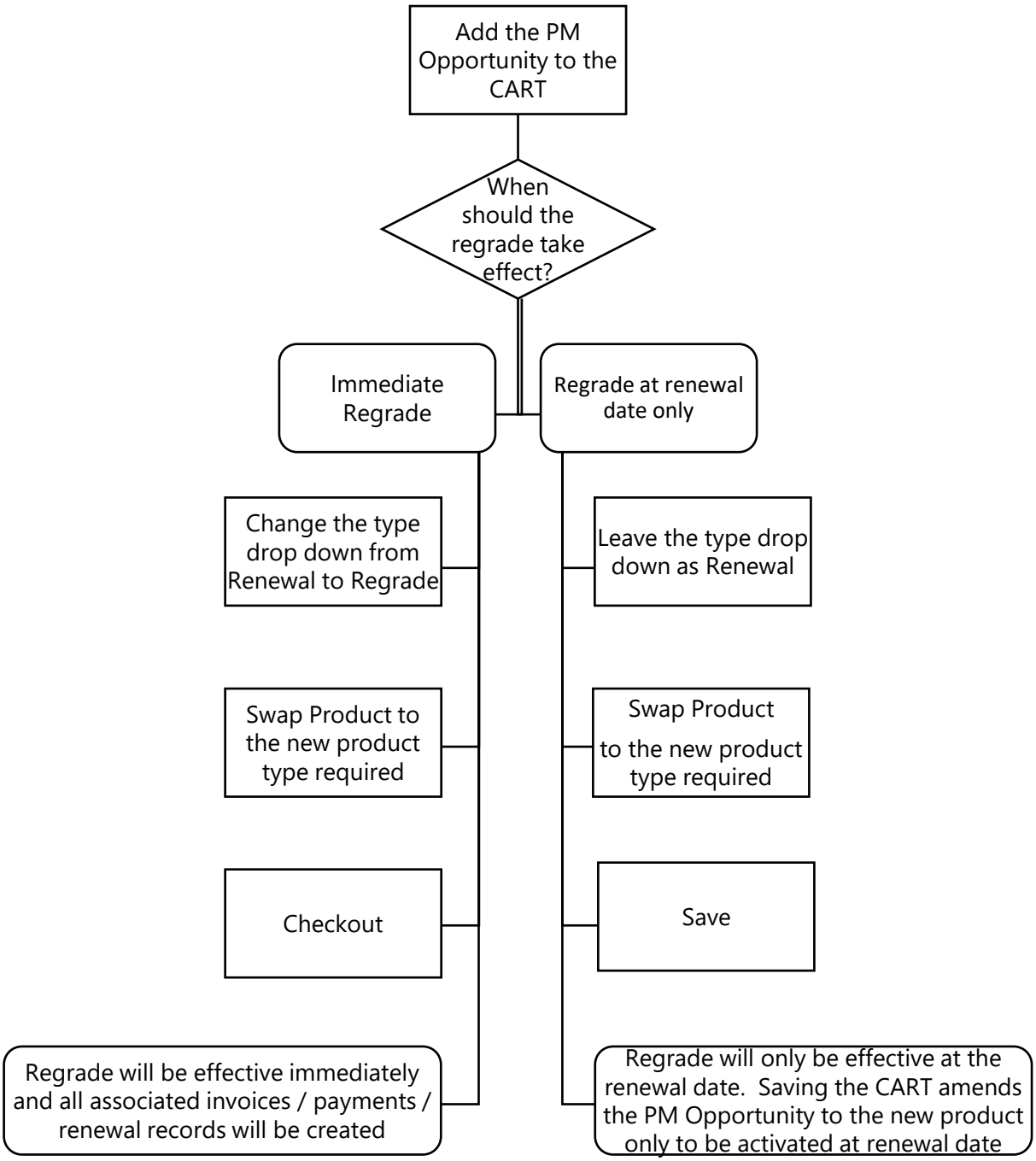
3.4. Regrade at renewal

- In this scenario, your customer has contacted you to ask to change their membership type when they renew. Their existing membership will run until their normal renewal date
- Open the *PM Opportunity* as described in the process above, go to the section labelled *Renewal Information* and click the blue hyperlink which appears in the *PM Opportunity* field
- You will now be in the *PM Opportunity* record. Do not make changes directly in this record; instead click on *Related* and then *Cart*.
- The Cart will now be loaded with the *PM Opportunity* details shown.
- For regrades at renewal, leave the *Type* as Renewal
- Press the *SWAP PRODUCT* button on the line of the membership and search for the new membership type
- Press SAVE (not checkout)



- This will update the PM Opportunity for the membership. It may be helpful to check the Membership information for your contact, their Membership should remain as active, however the PM Opportunity as shown in the Renewal Information section should now reflect the membership type you swapped to

3.5. Regrading process summary

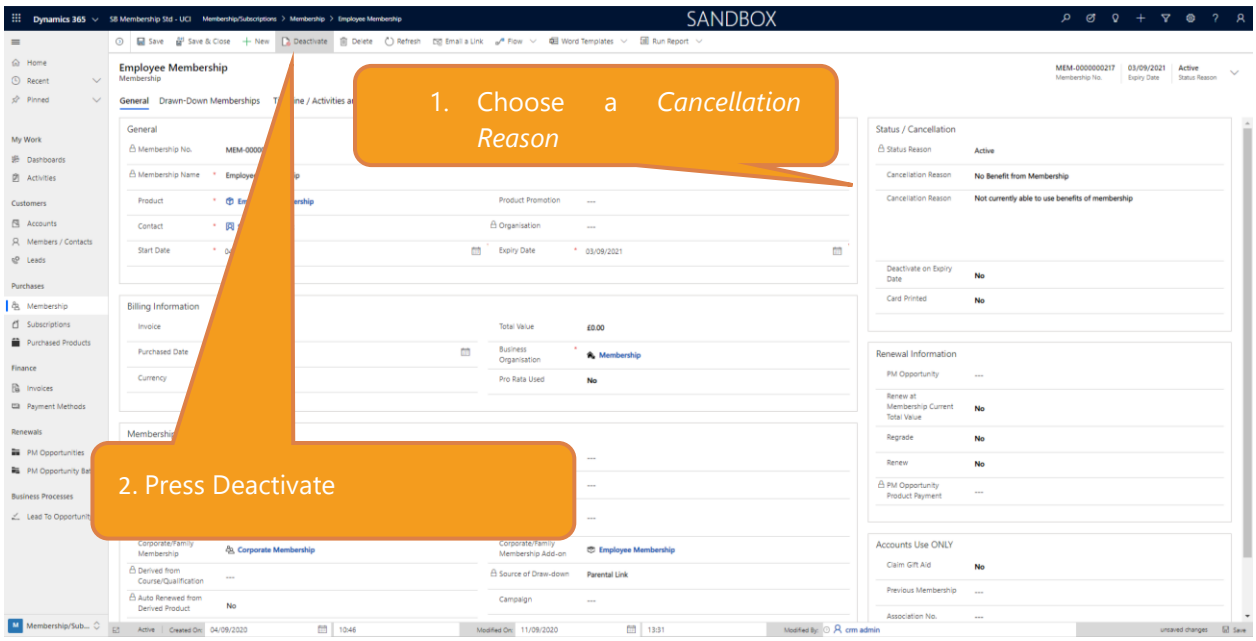


3.6. Membership cancellations

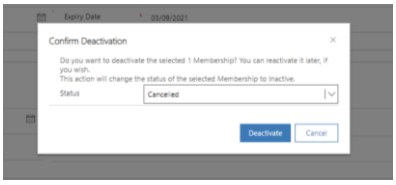
Rather than change to a different membership level, your clients may want to cancel a membership. They may request this is done immediately or ask for their membership not to be renewed.

3.7. Immediate cancellation

- Find the Contact (or Organisation) and access their membership information by clicking on the *Membership* tab if there is one or choosing *Related* and then *Memberships*.
- Open the relevant membership record
- Go to the *Status/Cancellation* section and select an appropriate *Cancellation Reason* from the drop-down list of options
- There is a second, optional *Cancellation Reason* box in which you can type free text
- We recommend you change the *Expiry date* to the date of cancellation
- Press the *Deactivate* button on the *Command Bar*



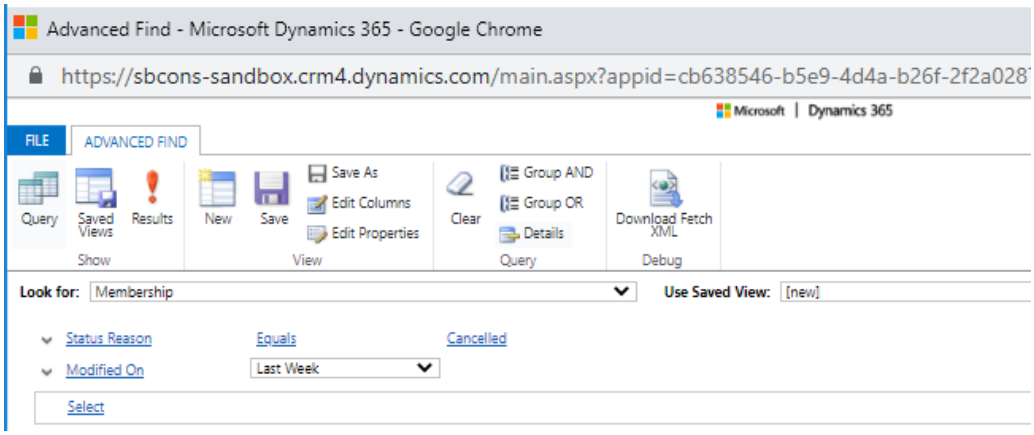
- A confirmation box appears, at this stage change the *Status* to **Cancelled** and then press *Deactivate*



- You can then check the process by viewing the Contact/Organisation's membership again; the membership should now be showing as inactive with a *Status Reason* of **Cancelled**

3.8. Implications and considerations of immediate cancellations

- If your customer has an outstanding invoice for the original product which has not been paid this may need to be cancelled, written off, or have a credit note applied, whichever is appropriate for your business practices. Please see the Finance Modules for help on these functions
- If your customer was paying by direct debit, the original direct debit contract will need to be cancelled – please see the Finance Modules
- If your customer has already paid for their membership your business practice may be to create a credit note and a refund. Please see the Finance guides
- Your organisation may have automated communications which are sent to confirm a cancellation, or you may need to confirm manually (e.g. by sending an email). Please check the activities section of your Contact or Organisation's record card for any automated emails which may have been sent if you need to verify this
- There may be other implications/processes – please check your internal practices for any additional tasks required
- You may find it helpful to create an *Advanced Find* and then use this to make a view showing any recent cancellations to ensure that the relevant team or team member carries out any finance functions. An example of an advanced find for cancellations is shown below. The criteria for this search are any memberships which have been cancelled with a *modified-on* date of last week.

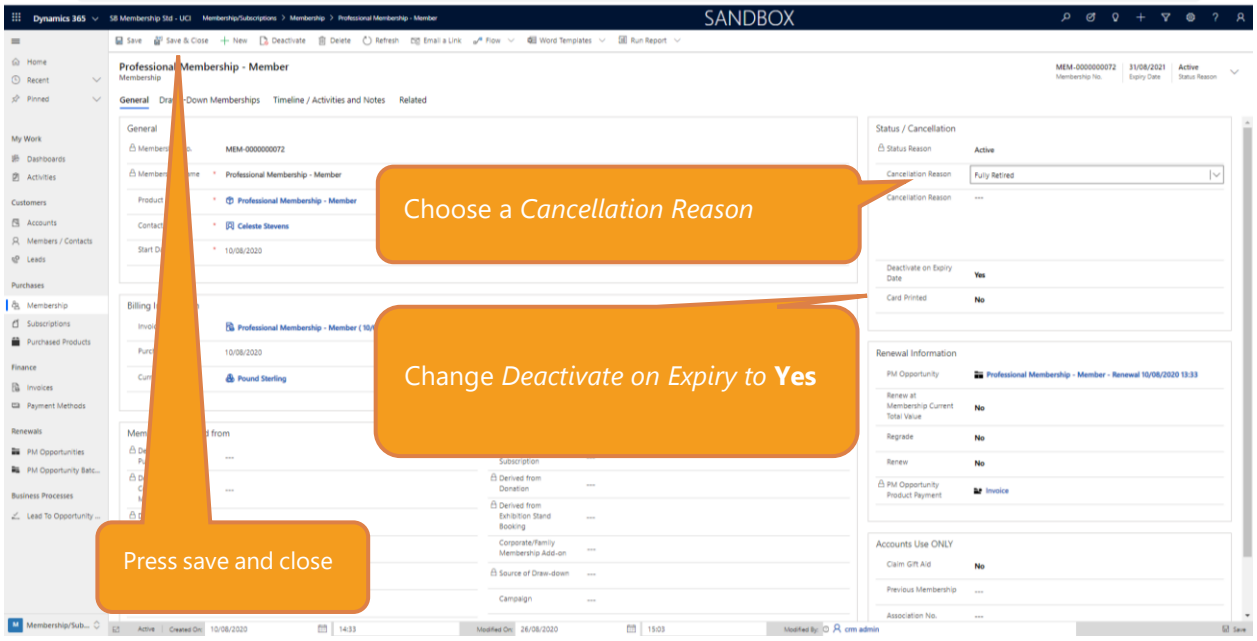


3.9. Cancelling at renewal

In this scenario, your client has asked for their membership not to be renewed; on the expiry date of their current membership the membership will end completely

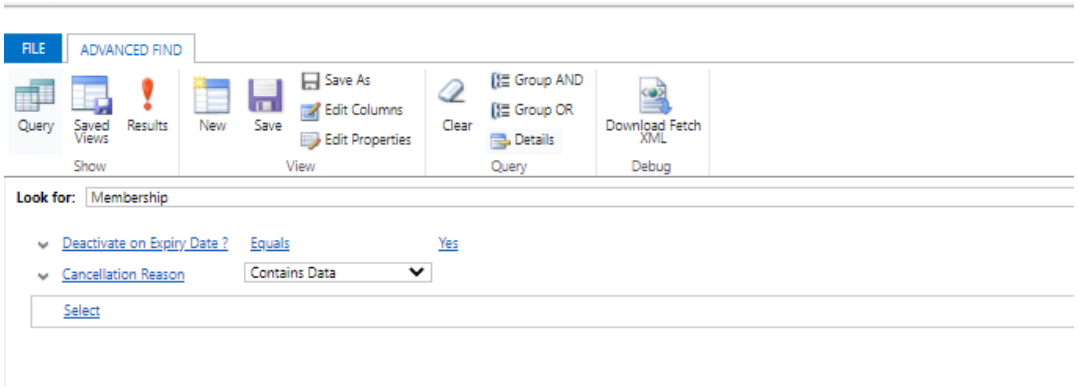
- Find the Contact (or Organisation) and access their membership information by clicking on the *Membership* tab if there is one or choosing *Related* and then *Memberships*.
- Open the relevant *Membership* record
- Go to the *Status/Cancellation* section and select an appropriate *Cancellation Reason* from the drop-down list of options
- There is a second, optional *Cancellation Reason* box in which you can type free text
- Change the *Deactivate on Expiry* field to Yes.
- Press *Save & Close* – do not deactivate the membership
- When the membership/subscription reaches the expiry date it will be automatically cancelled, and no renewal will take place

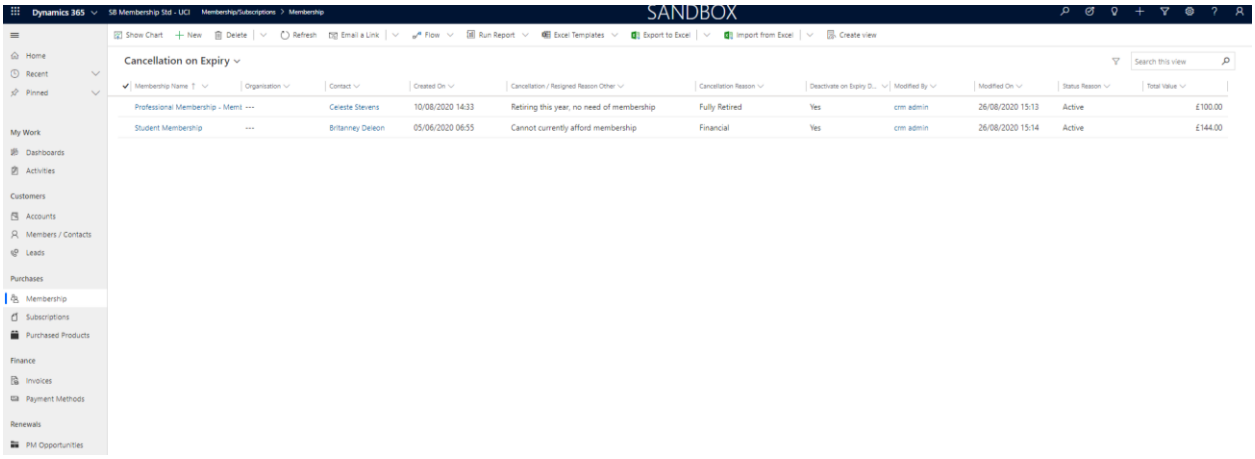
MEMBERSHIPS, SUBSCRIPTIONS AND PRODUCTS – INTERMEDIATE MODULE



Monitoring cancellations at renewal

- You may find it helpful to create an Advanced Find to help monitor these cancellations. The screenshots below show the criteria and the resulting view (additional columns were added to the default options).





4. Renewals

- If a membership is renewed on or before its expiry date, then after the expiry date that membership will be inactive, and a new membership will begin
- A membership is renewed if the Bulk Renewal Tool (described further in this section) or the individual renewal process takes place. When the renewal occurs, the new membership record is updated and an invoice is created for your customer (and in most cases, depending on your configuration, it will be emailed to your customer for them to pay via a number of methods including your portal or by contacting your membership team)
- The term **renewed** does not indicate that the membership has been paid for. A Membership can have been renewed, and the new membership now active, while you are awaiting payment
- Some organisations put the emphasis on the client to renew their membership and therefore memberships are renewed on an individual basis. The Introductory Module covers individually renewals
- If a membership is not renewed it will eventually lapse (there are different options around lapsing, please see below)
- Some organisations however prefer to automatically renew all memberships (or all of certain types of memberships); usually in advance of their expiry date, giving their members the opportunity to pay their new invoices, or cancel their renewed membership if they do not want to keep it.
- In this case, if those members do not pay their membership fees within a certain amount of time, further steps would need to be taken by those organisations to review and if necessary, change the status of those memberships, as they will be renewed and active. This is not an automated process unless it has been specifically requested as part of your Silverbear configuration
- The Direct Debit schedule will correspond with the dates of the renewed membership. For example, if a membership is due to expire on 31st August, but is renewed in early July, then the Direct Debit payments will not start until the new membership starts.
- If a membership is not renewed and does not have *Deactivate at Renewal* ticked (as we carried out in the section above) then the membership will remain active until a lapsing process takes place which will change the status of any non-renewed memberships. This is covered further in this section

4.1. Accessing the Bulk renewal tool

The Bulk Renewal Tool is a separate application that will be stored on your own computer(s) or be available on a remote desktop. It is not currently on the Cloud and is not accessed through Silverbear CRM. Your Systems Administrator or Silverbear should be able to help you access the Bulk Renewal Tool. The shortcut is the icon below

4.2. Scheduling the use of the Bulk Renewal Tool

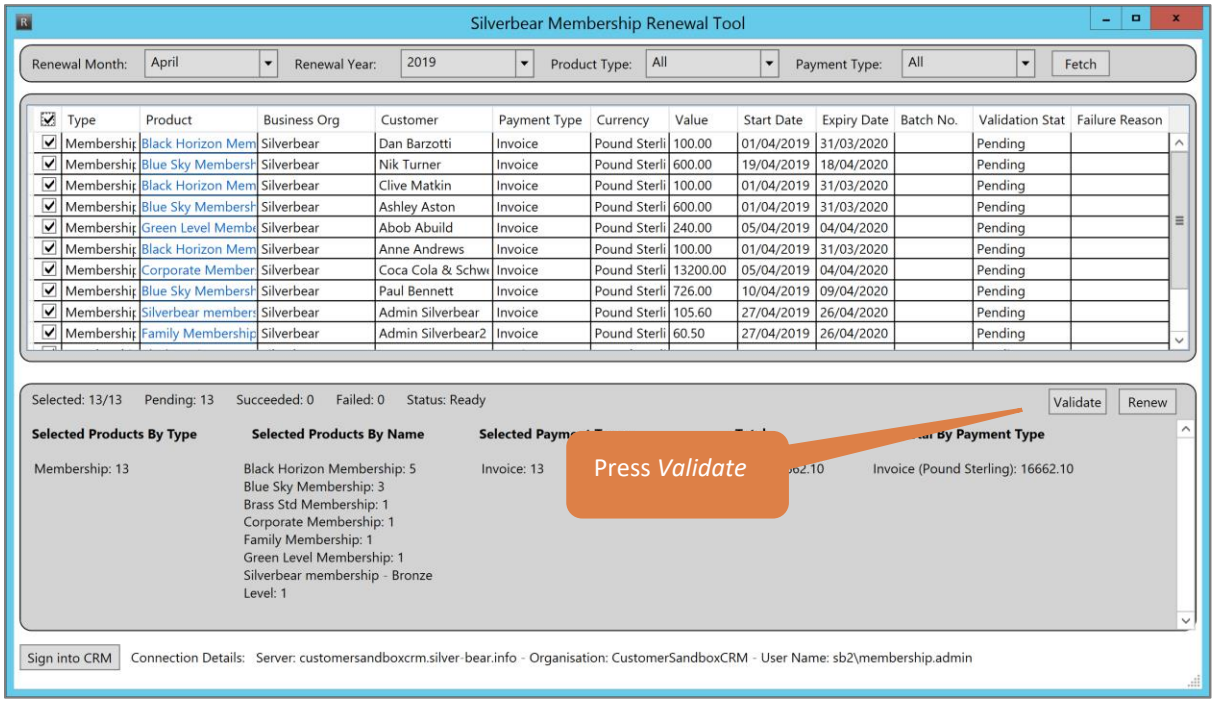
- The tool should be run whenever you want to renew a set of memberships in bulk. Many organisations carry this out once a month for memberships due to expire in the near future (e.g. the followng month, or the month after)
- The Bulk Renewal process can take some time to process the updates, depending on the number of memberships and subscriptions you are renewing. For large batches, this process is best carried out overnight or during close of business. The PM Opportunity update process is suspended whilst a Bulk Renewal is processing.

4.3. Running a bulk renewal

- Open the tool and connect to your CRM
- Select the *Month* and *Year* for renewals. Any memberships which expire in the month you have chosen can then be retrieved and renewed
- Select the *Product Type* – *Membership* or *Subscription* or Both (All)
- Select the *Payment Type* – for example you can choose all memberships/subscriptions payable by **Direct Debit** or all payable by **Credit Card**. To retrieve all records for that month regardless of payment type choose *Payment Type* **All**
- Press Fetch. All memberships or subscriptions by the chosen payment type which are due to expire in the month you have chosen will be returned. This can take up to a few minutes
- Once the records have been retrieved the next process is to run a validation process on the records

- Select all the records by clicking on the check box at the top of the left-hand side or click on the check box next to individual records to select only specific ones. The bottom section then updates to give you totals of these memberships/subscriptions by Type (e.g. Membership or Subscription), Name (e.g. Standard Membership, Student Membership) Payment Types plus monetary totals, overall and by Payment Type

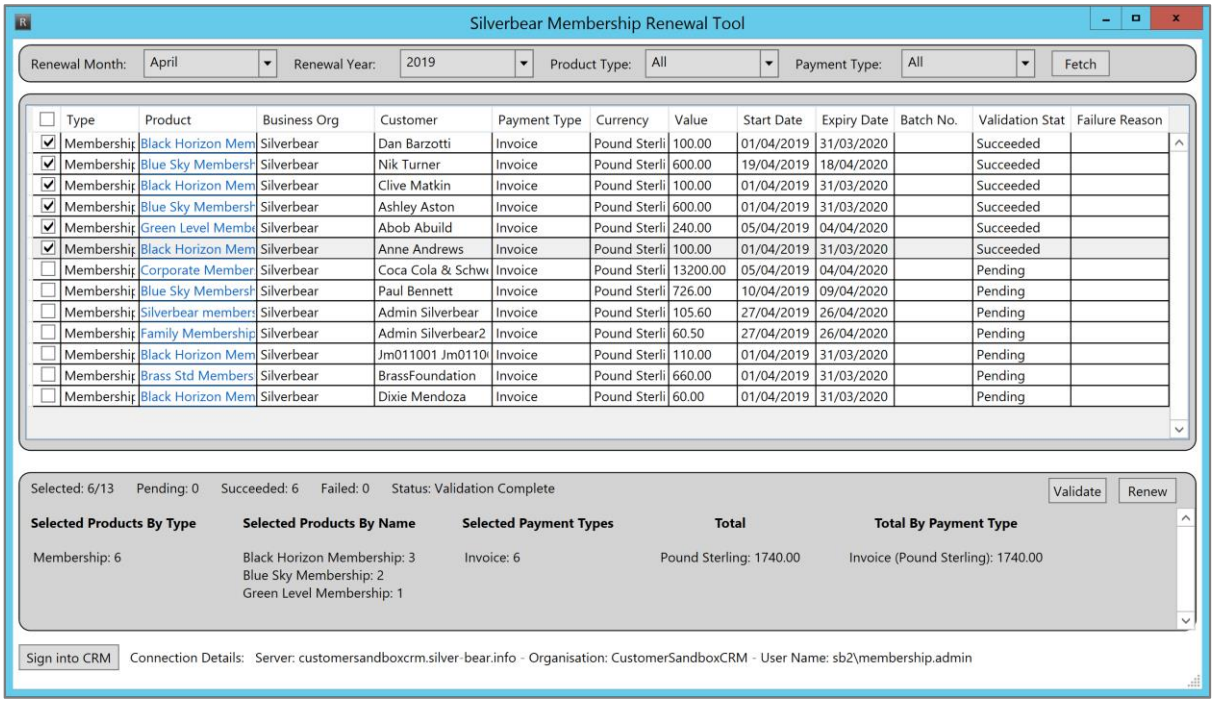
- Next click on the *Validate* button



- The following are potential validation error messages, which may appear after running the validation process. If you receive any of these errors, at this stage you may want to return to the CRM to resolve the issue before running the bulk tool. Alternatively, you can run the Bulk Tool and resolve issues later, but those records will not be renewed
  - Owner is not Identifiable (Owner Id is empty). – No contact or organisation against the membership
  - Product is not renewable. - The product is not flagged for renewa
  - The Direct Debit Payment and/or Direct Debit Mandate for this membership is not active
  - There are no payment method records for this membership

- Product Price is not populated (this may indicate there is no price list item or price list available?
- The Member Number is not populated

- Membership renewals that have been validated will show a *Validation Status* as



Succeeded

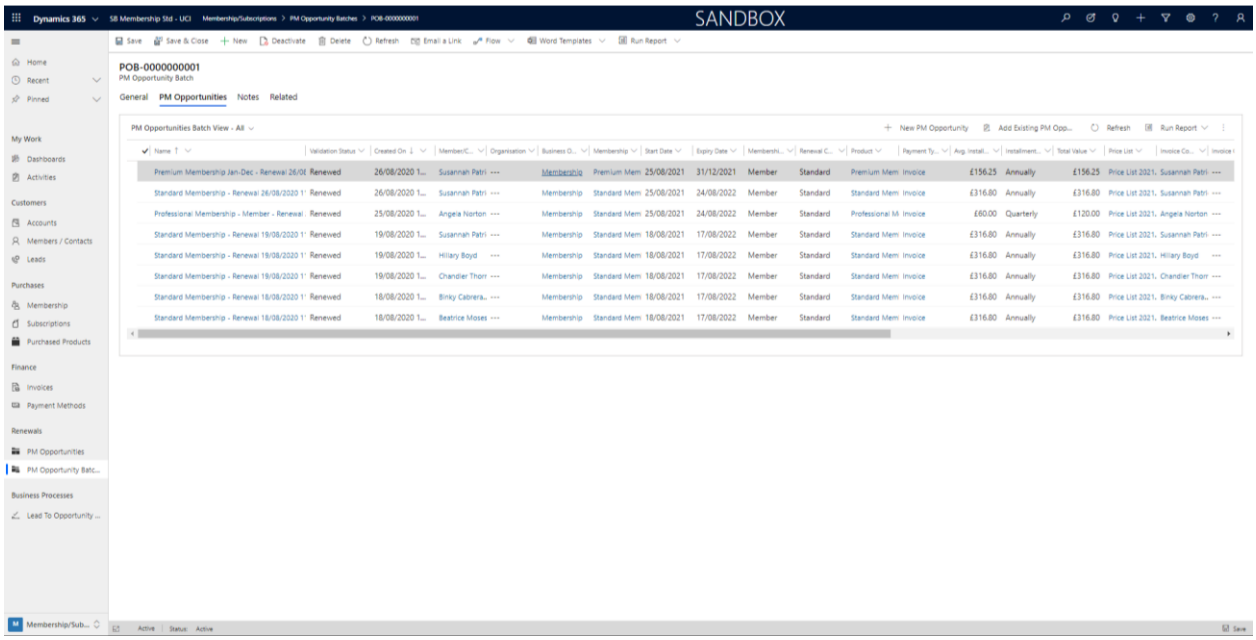
- When you are happy to run the Bulk Renewal on this set of memberships and/or subscriptions, press *Renew*

4.4. The effects of the bulk renewal

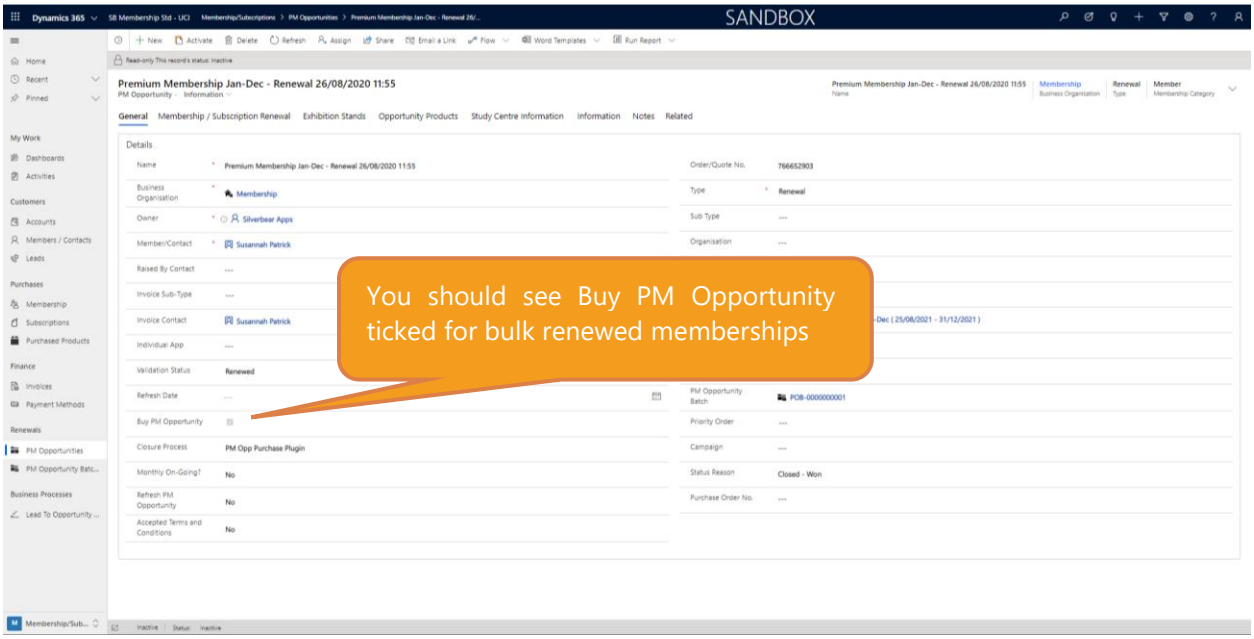
- After the proces takes place the current memberships will remain active until they expire, however new memberships with a *Status Reason* of **Pending** will be created for the members who have been renewed.
- When the current membership reaches its expiry date, its *Status Reason* will change to **Renewed.** The Pending membership will then have a *Status Reason* of Active
- If you performed a *regrade at renewal date* process at any point your customer's membership will have been renewed at the new membership type
- Depending on your configuration, some communications will be sent to the customer, e.g. a renewal notification and/or an invoice or direct debit contract/payment information

4.5. Verifying the renewal processes in CRM

- On completion of the renewal process a batch number is populated against each corresponding record. These batches allow you to store a list of all the memberships that were renewed as part of that process. You may want to access the batch to check a sample of the memberships to confirm they have renewed as you are expecting. You can access the batches by clicking on *PM Opportunity Batches* which is normally a menu option in the *Membership/Subscription* Work Area.
- Click on the batch to open it
- Once open, click on the *PM Opportunities* tab to see all the memberships which were renewed



- You can filter for any failures by using the filter on the *Validation Status* column
- Click on any of the membership to view them, or alternatively click on the contact or organisation to access their records and check their Membership and/or invoices/direct debit sections to see the effects of the renewal.
- You will know if a renewal was completed by the bulk renewal tool by opening one of the PM Opportunity record and check if the *Buy PM Opportunity* field is checked:



4.6. Reversing Bulk Renewed Memberships/Subscriptions

Please see the Fundamentals and administration – advanced guide (when available) for information on reversing bulk renewed memberships or consult the legacy version guides.

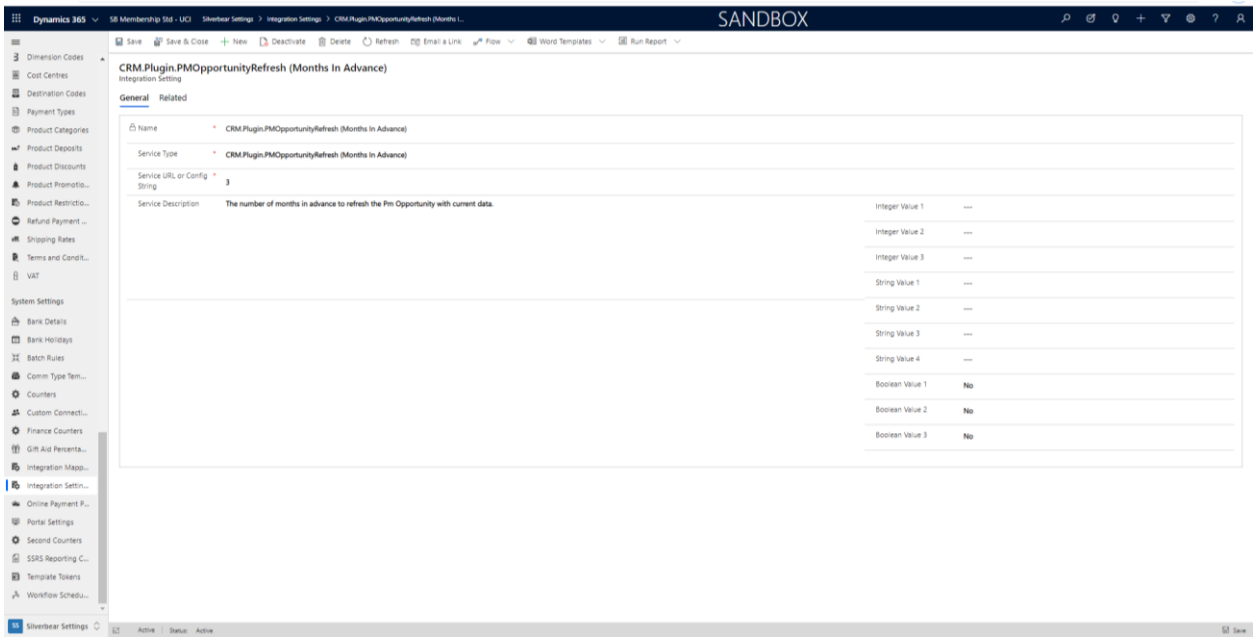
5. The PM Opportunity refresher process

When you sell a renewable product a *PM Opportunity* is created using the pricing information on the price list that relates to the period it will renew in, which is why it is essential to have a Price List set for the following year as well as the current year. For more information on Price Lists and price updates please see the Advanced Module.

However, some organisations will find that they need to make changes to those following year prices at some point and if so, the PM Opportunties will need to be rebuilt in order to reflect the new pricing for that year's membership.

Because of this there is a PM refresher tool built in to most Silverbear CRM'S. This will rebuild the PM Opportunities a certain number of months before the renewal date for that membership by searching for a new price on the relevant price list and making any adjustment. This is an overnight process. For that reason, price lists will need to be updated before the number of months in advance in the plugin.

- To check how many months in advance you can go to *Silverbear Settings* Work Area and choose the *Integration Settings* option. Search for the plugin *CRM.Plugin.PMOpportunityRefresh(Months in Advance)*
- The number of months is shown in the *Config String* field. In this case 3. Therefore price lists would need to be updated at least 3 months before they come into force.



Example 1

- A renewable Membership is purchased on 1st March 2020 with an expiry date of 28th February 2021.
- The organisation has a *Price List* that runs from 1st January 2020 to 31st December 2020 and the following price list runs from 1st January 2021 to 31st December 2021. At the time the member purchased the membership the price for their membership on the 2021 *Price List* was set at £250. When they purchased their membership a PM Opportunity for a membership starting 1st March 2021 at a price of £250 was created.
- However, a pricing review takes place in August 2020 and it is decided to increase the 2021 prices from £250 to £275. The 2021 Price List is updated with the new £275 price.
- Three months before the membership is due to renew (e.g. 30th November 2020), the PM Refresher Tool rebuilds the *PM Opportunity* using the new price. When this membership is renewed it will be charged at the new 2021 price.

Example 2

- As before a renewable Membership is purchased on 1st March 2020 with an expiry date of 28th February 2021.
- The organisation has a Price List that runs from 1st January 2020 to 31st December 2020 and the following price list runs from 1st January 2021 to 31st December 2021. At the time the member purchased the membership the price for their membership on the 2021 price list was set at £250. When they purchased their membership a PM Opportunity for a membership starting 1st March 2021 at a price of £250 was created.
- However, a pricing review takes place in early December 2020 and it is decided to increase the 2021 prices from £250 to £275. On December the 15th 2020 the 2021 Price List is updated with the new £275 price.
- However, three months before the membership is due to renew (e.g. 30th November 2020), the PM Refresher tool already checked the PM Opportunity against the price on the 2021 Price List and as the price had not changed the membership will be renewed at the previous 2021 price unless some manual intervention takes place.

To avoid issues such as described in example 2, it is essential that your Price Lists are updated before the PM tool refreshes the PM opportunities for the memberships which will soon be renewing.

For example:

- your new price list starts on 1st September 2021 and your refresh months = 2, you nee dto update your price lists before 1st July 2021
- Your new price lists start on 1st January 2021, and your refresh months = 3, you need to update your price lists before 1st October 2021

6. Lapsed memberships and the Lapsing Service

Please note that this aspect of the guide can be applied to Subscriptions or Memberships; however, for ease, the term memberships is mainly used.

- Silverbear memberships can become **inactive** with a *Status Reason* of **Lapsed**. (rather than cancelled). This normally occures with to memberships that have not been renewed by the date of expiry and the membership has then been changed by the Silverbear system to lapsed
- In many cases, an organisation may want to allow a grace period. This is the period between a membership's expiry date, and it being changed to a lapsed membership; giving the member extra time to renew
- Please note that there is no standard link between the non-payment of memberships and the lapsing process. If a membership has been renewed, but not paid and you wish to change the status of that membership, manual processes, workflows or other automation would need to be in place to ensure that happened. The lapsing process changes an active membership that has not been renewed to **lapsed**. If a membership has been renewed (and therefore has been billed), the lapsing mechanism will not change the status to lapsed.

6.1. Lapsing criteria

To lapse a membership (or subscription) must meet the following criteria

- The product (the membership or subscription) must be set up as lapsable. To check how your products are set up, go to the *Marketing* Work Area and choose the *Product* menu option and then click on the product. Check that the *Non-lapsable* is set to **No;** this means that the membership can lapse. If a product is setup with *Non lapsable* = **yes** it will not end at the expiry date.
- The *Expiry Date* needs to have passed and the membership must not have been renewed (either individually or with the bulk renewal tool).
- If there is a *Grace Period* defined on your Silverbear system – please see below - this period needs to have passed
- Memberships which meet the above criteria will be updated overnight by the Lapsing Tool. It will change the *Status* of those memberships to **Inactive** with a *Status Reason* of **Lapsed**.

6.2. The Grace Period

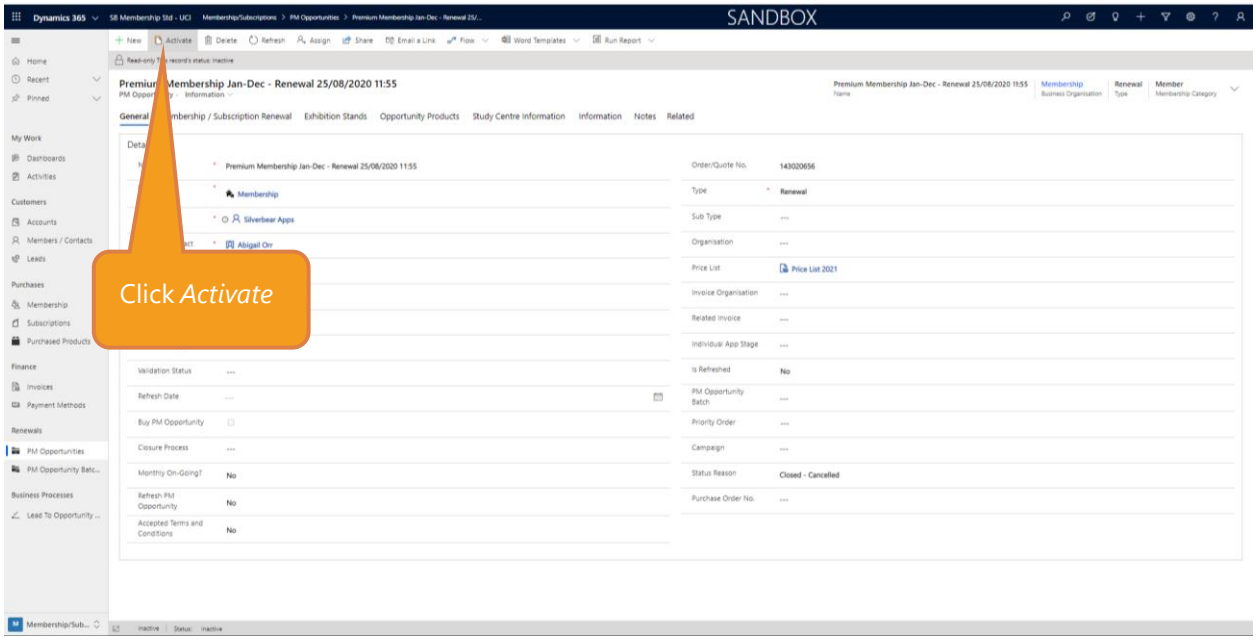
Silverbear's lapsing service has a configurable Grace Period. The default length is 3 months, but it could be a much shorter period, even just a matter of days as this period can be customised depending on your business process. Please check with your Systems Administrator or Silverbear if you need to check or adjust the grace period for the lapsing process.

6.3. Renewing a lapsed membership

Sometimes a client whose membership has lapsed might want to renew or re-join. The two options are to sell the member a brand-new membership – through the Cart in the normal way - or to renew the older lapsed membership.

If you choose to reactivate the closed PM Opportunity on the lapsed membership and then process the renewal through the cart then the implications of this are that if the original expiry date was some months ago, renewing it might only give a very short membership period.

- Open your contact record, go to the *Memberships* tab (or *Related* and then *Memberships*) to find the lapsed membership, and click to open it. You might need to change the view to include Inactive Memberships as well as the Active ones
- Once you have opened the membership, scroll down to the Renewal Information section and click on the PM Opportunity (the blue hyperlink). This PM Opportunity will be inactive with a Status Reason of Closed - Cancelled
- Click the *Activate* button on the command bar to reopen this record, note that you are reactivating the PM Opporutnity (the renewal record) not the original membership



- Click *Related* and then *Cart* to go into the Cart and process the renewal as normal
- The membership will default to starting when the previous one ended, and the previous membership will be shown as **renewed**