Silverbear Membership Solution

MEMBERSHIPS AND SUBSCRIPTIONS – INTRODUCTORY MODULE

Department Area:	TRAINING
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Responsible for Communication/Implementation:	SILVERBEAR AND SILVERBEAR CLIENTS

Revision History

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Approval

Approver	
Date of latest approval by Management	

Version History

Version	Date	Author	Change Details	Reviewed by
1.0	February 2020	SUSANNAH PATRICK	CREATED	

Video

Video guide available	Video URL	Last updated

1. Guide Purpose and Usage

GUIDE PURPOSE

- To accompany the Memberships, Subscriptions and Products introductory course
- To help Silverbear clients familiarise themselves with the basic functions of Memberships and Subscriptions

INCLUDED

- An introduction to how memberships and subscriptions are sold on Silverbear
- How to view membership and subscription details for a member
- Explanation of PM Opportunities
- Overview of membership and subscriptions sales through the cart
- Overview of renewals process

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.

PREREQUESITE GUIDES/COURSES	RECOMMENDED PRIOR GUIDES/COURSE	RECOMMENDED FOLLOW UP COURSE(S)
Fundamentals – Introductory Contacts and Organisations – Introductory Module		Memberships, Subscriptions and Products: intermediate 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

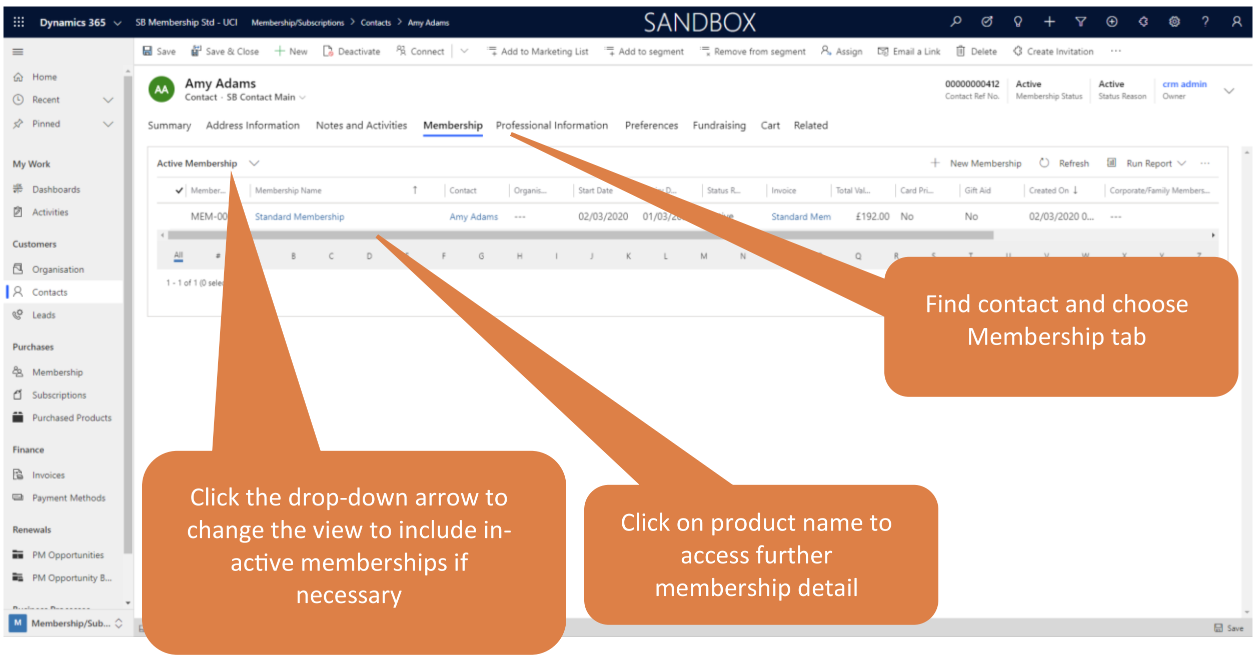
If you have any feedback on any of the instructions or screen shots please email susannah.patrick@silverbear.com

1. Memberships and Subscriptions sales

Memberships and subscriptions on Silverbear can be sold in one of two ways, either through your organisation's customer services team using the *CART* or via your portal.

2. Viewing existing memberships and subscriptions

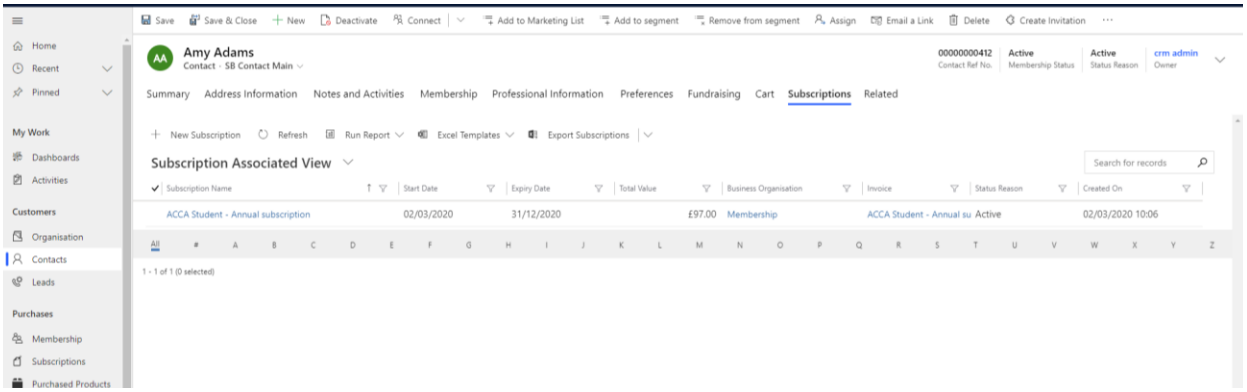
- To view a contact's existing membership, the easiest way is to access their record card first by using the quick search or going into *Contacts* and using the *Search for Records* field. Note, the processes described can also be applied to Organisations (otherwise known as Accounts)



- Once in the contact's record card, choose the *Membership* tab to view their current memberships. You can also change the view by pressing the arrow next to Active Memberships to change to include In-Active memberships.

Please do not create a membership on this screen, memberships need to be created through the Cart.

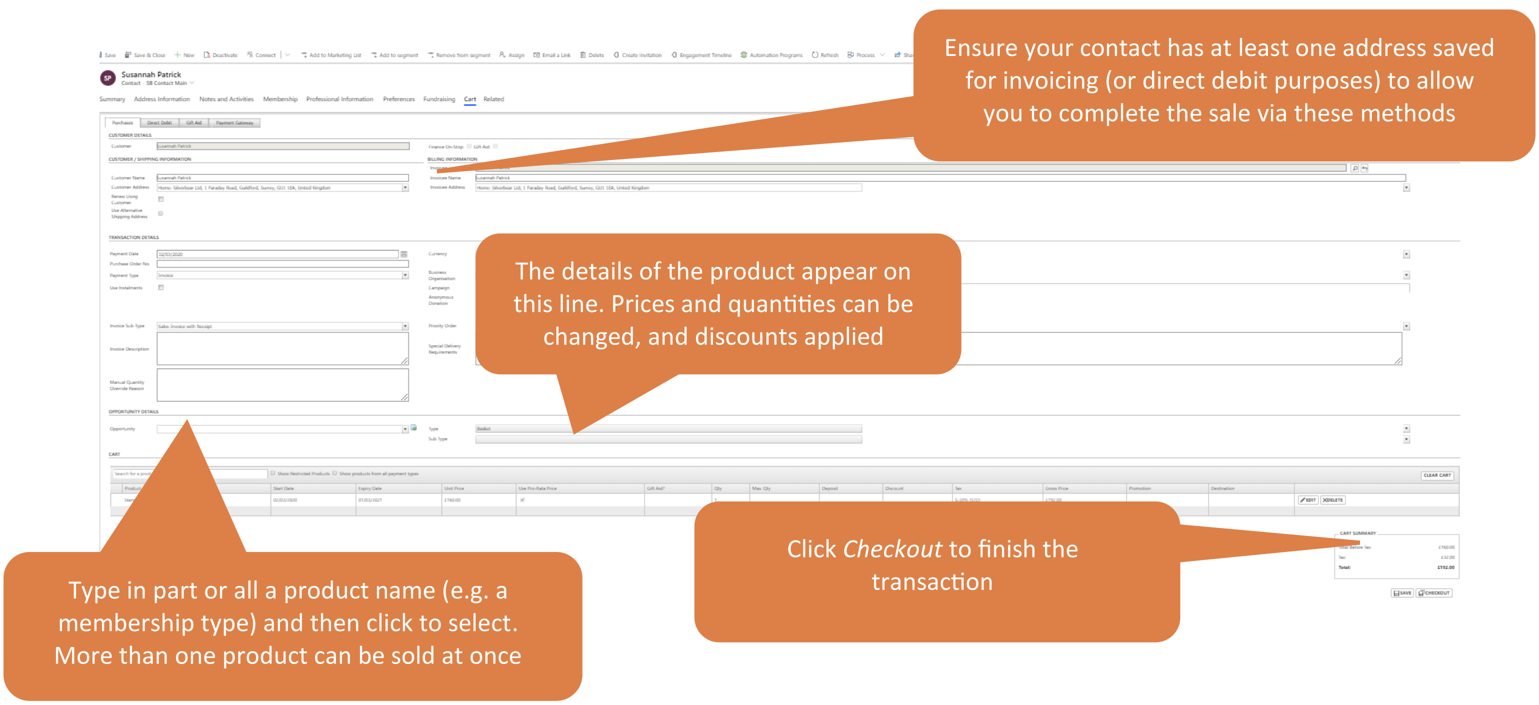
To view subscriptions, click on the *Related (or …)* tab and select *Subscriptions*. Again, do not create a new subscription on this screen



3. Selling a membership or subscription in the Cart – basic transactions

- Sales to contacts made through the CRM (rather than via the portal) take place through the *CART*.   Once you have found your Contact and can view their record card, choose the *CART* tab. If you cannot see a *CART* tab, press Related (…)and then select CART.
- When you have the Cart "loaded" you can check and change a number of details, including the invoice address (required for payment by invoice and Direct Debit) and the payment type (in this case the Payment type is Invoice). After selecting your product(s) you can edit quantities, the price and apply discounts.   Press Checkout to finish the transaction or Save to store the invoice and product details to return to later.

Please note that below is an introduction to membership sales. The Intermediate guide for this module will cover this area in further detail, including Direct Debit payments, alternative payer arrangements and applying price changes and discounts and changes to quantities and dates.

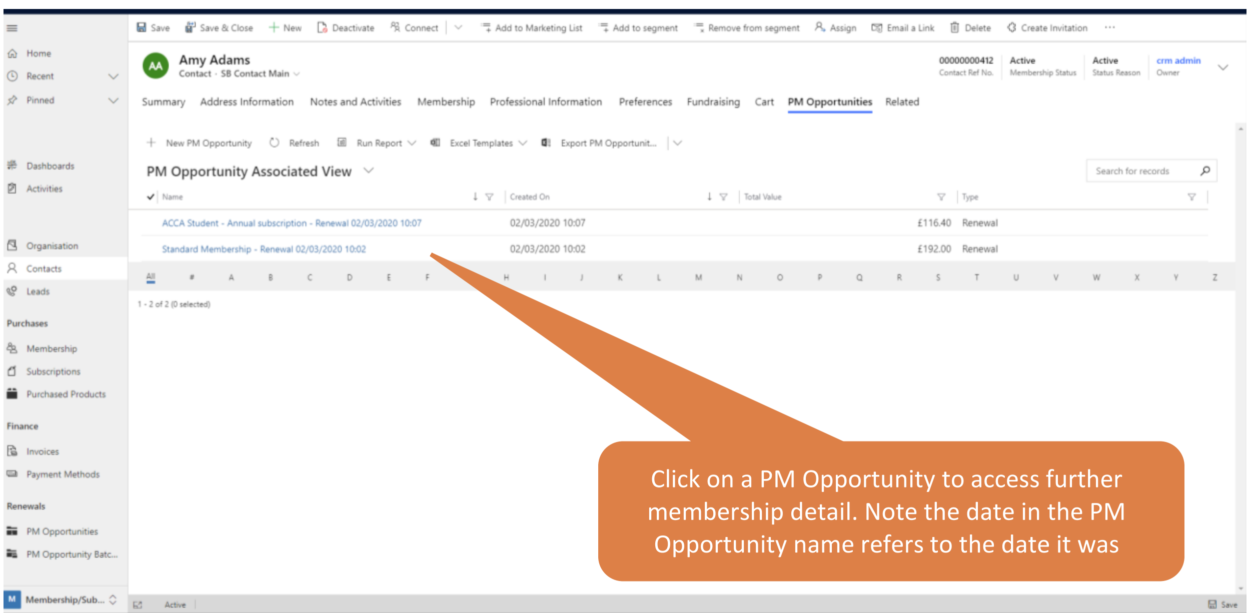


4. PM Opportunities – an overview

You will regularly see and hear the term PM opportunities. PM Opportunities are a mechanism by which memberships and subscriptions are renewed, and they also allow for forecasting of future memberships. When a renewable product such as a membership or a subscription is sold a PM Opportunity is created to display the product which will be purchased at that renewal stage. It might be helpful to think of this as a "potential membership" opportunity. If you *SAVE* rather than check out a purchase in the cart this will also be saved as a PM Opportunity.

5. Viewing a contact's PM Opportunities

- You may need to access a contact's PM opportunities to give them details of their renewal date and cost. Once you have found your Contact, chose the Related tab and then PM Opportunities. You will then see a list of PM Opportunities that have been created for this customer. In this case the contact has a subscription and a membership, so they have a PM opportunity for both products.



- When you are in the details for the PM Opportunity, you may find the Membership/Subscription tab the most useful. This shows you essential information such as the start date, current payment type and price. Renewals will be covered further in the Memberships and Subscriptions Intermediate course.

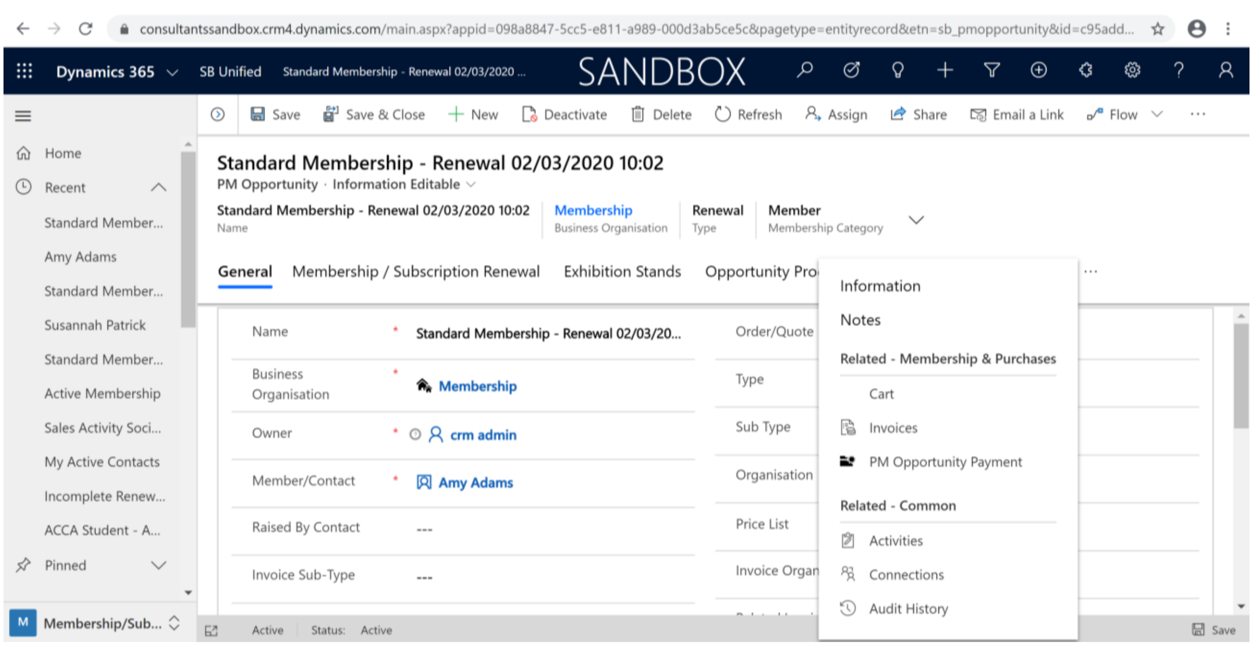
If you are expecting to see a PM opportunity and there is not one, it may be because the membership or subscription purchased by that contact is not renewable, or there is no price available for the year in which it will renew. This can be checked in the product details and the price list information. Product setup and price lists are covered in the Memberships and Subscriptions Advanced course.

6. Renewals – an overview

Memberships or subscriptions which are renewable are likely to be renewed either at a fixed point in the year, so that all membership of that type start and finish on the same dates (e.g. 1st January to 31st December), or they will run for a fixed period, normally 12 months from the date they are sold. Some organisations will renew memberships automatically, and some will require members to renew their memberships either online or through your organisation's customer or member services. How you process renewals on the CRM will be dependent on which of these methods you employ. Information on Bulk Renewals and further details on single renewals will be covered further in the Intermediate module of this course. We have given a brief idea of how to renew a membership manually below.

7. Processing a Manual Renewal

- First find your contact, then click *Related,* then *PM Opportunity*. Click on the relevant PM Opportunity (the one that relates to the membership or subscription the client is renewing), and then press Related and then CART.



- This will then take you into the Cart with that PM opportunity pre-loaded as a product to be checked out. *Checkout* will renew the membership.