

Collecting Membership Dues on Flipcause

You can use recurring donations on Flipcause to collect membership dues for your organization.

There are several benefits to switching your offline or manual signup and dues collection processes to using a Flipcause campaign for this purpose:

1. Cut down on staff hours by offering self-signup.
2. Automatically recurring charges (monthly, quarterly, annually) so you don't have to collect payment manually.
3. Automated thank you letters, tax receipts, and emailing membership information, including perks.
4. New members get added to your Flipcause Activity Tracker automatically, including if they sign up as a business or an individual.
5. Fine-tune tax-deductibility settings to your specifications.
6. Easy reporting and management of your members, including automated messages in case of payment failure.
7. The ability to set start and end times to membership installments, regardless of when the new member signs up.
8. Grant members the ability to end or change their membership payments themselves, as well as update their credit card information on their own.

Setting It Up

STEP 1. Create a "Donation" campaign.

The Donation tool is the only one that offers recurring payments, so this is the tool we'll want to use. Go to **Campaigns > Create a New Campaign > Donation/Payment**. Title this "Membership" or something similar.

STEP 2. Re-name the Call-to-Action and Donation Descriptor to make the campaign language membership-focused instead of donation-focused.

We recommend "Become a Member" and "Membership Payment". This will change every instance of the word "Donation" to "Membership Payment" throughout the checkout flow. This is editable in **Donation/Payment Settings**.

STEP 3. Choose the payment frequencies you'd like to offer.



Toggle off any frequencies you do not plan to offer. For our example, we'll offer only monthly and annual payment options. (We'll also want to show the Titles and Descriptions to make it easy for supporters to confirm the membership level they are selecting.)

This is editable in **Donation/Payment Settings**.

STEP 4. Personalize the **Thank You Page**

We rarely want to leave a generic message, so let's make it count. This is a good place to reassure your new members. Don't forget to click **SAVE** before proceeding to the next section to save your changes.

STEP 5. Set up your price levels and payment options

First, determine a few things:

- Do you want your recurring levels to be mathematically linked? For example, if I set up a \$5/month option, do I want the annual level to be tied to this ($\$5 \times 12$ months in a year = \$60/year annual level)?
- How much, if any, will be tax-deductible? This can be a dollar amount or a percentage.
- Do you want to offer an open, pay what you wish level?
- Do you want to pre-program start and/or end times for these payments, or have them recur indefinitely?
- Are there any custom questions you'd like to ask or specific information you'd like to collect (besides standard contact info)?

Now, you can safely ignore the settings for any payment frequency you are not offering. In this case, we'll ignore the "one-time" and "quarterly" sections since we already toggled those to OFF. We're going to start with Monthly Recurring options first:

We know that:

- we DO want the recurring levels to be linked, so we'll keep the top box checked to not have to set up Annual levels separately,
- our membership is 20% tax-deductible,
- we do NOT want to offer a pay-what-you-wish option, so we will set the **Open Donation Amount** Field to "Hide",

Next, open **Advanced Monthly Donation Settings** if you do want to d). [specify start and end times for the payments](#) or e). gather custom information from your new members.

For this example, we'd like to commit the first payment to happen immediately and have the last payment end after 12 monthly payments (but we recommend keeping it ongoing until canceled manually, which is the default setting).

At this stage, you can also add sales tax, shipping, and waivers, if applicable. To add Custom Fields, click on the bar and toggle them to "Yes". You can then use the dropdown to pick existing custom questions or to set up new ones:





Next, we can set our payment levels per membership option: their price amount, name, and descriptions. Delete any levels you don't plan to use by clicking the **X** next to it, and hit **SAVE** to save your levels for this frequency and continue.

STEP 6. Repeat Step 5 for the other frequencies you're offering.

If you kept the box checked for a). to keep the levels consistent, you won't have to set up your prices, titles, and descriptions again, but you still will have to set again each of:

- tax-deduction options,
- open donation amount field settings,
- start and end date settings,
- and custom fields (and tax, shipping, waiver) information.

Of course, if you unchecked the box for a), you'll need to set up each payment level separately for your other recurring options.

Click **SAVE** to save your settings.

STEP 7: Review and set your Information Collection Settings.

Go to [Order Settings > Information Collection Settings](#). This is where you can turn on Business information collection on, gather middle names, titles and suffixes, as well as configure any other contact information you'd like to collect and make it optional or required.

STEP 8: Review and customize your Receipt Settings.

Transaction Receipt Settings refer to the initial transaction receipt that gets emailed on new transactions. This is a great opportunity to include any membership details or a link to a document outlining membership benefits.

Recurring Payment Receipt Settings refer to the receipt that is sent for every subsequent recurring automatic charge. Since you might want slightly separate messages for each, you will want to customize them separately.

You can also test the receipts before launching.

STEP 9: Integrate onto your website and launch

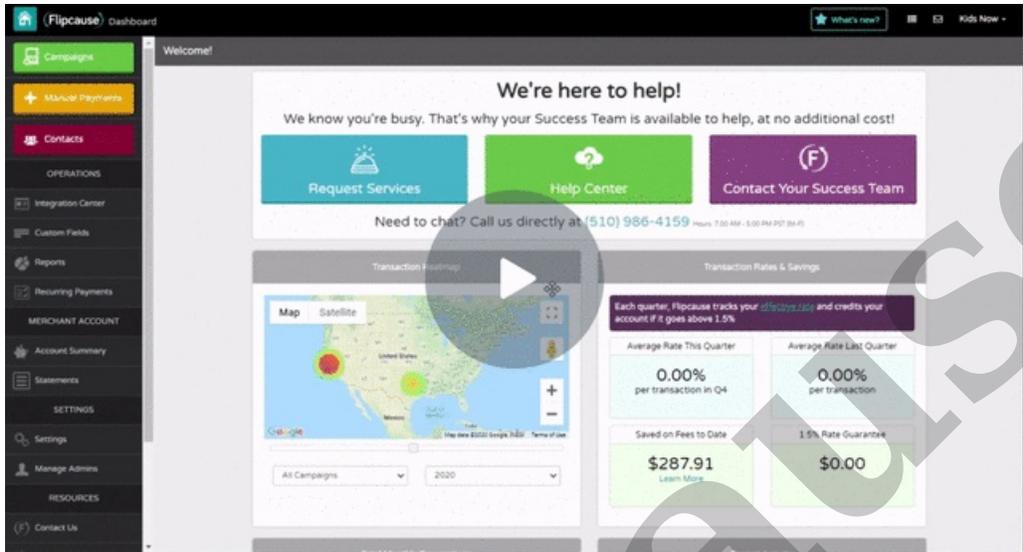
Your website probably has a membership portal or information page. We recommend this, so supporters can





find this area and sign up to become members. Here's [our example of a membership portal](#) and this campaign integrated.

You can see here for a full list of steps and tips to launch your new membership campaign.



As always, your Success Team is here for you every step of the way! Get support by sending us an email.

