How To Set Up A Gift Membership Program

Gift Membership is a way for customers to purchase a membership as a gift. We use the **Gift Certificate/Card** feature to create this internal gift program. We recommend adding this to your existing **Membership Sales Organization** (Blue Folder) in **Administration**.

*NOTE: Gift Memberships <u>do not automatically</u> process into an actual **Membership**. It is just a payment method that one of your staff from your organization will need to use when processing the actual **Membership** for the person who will receive the membership card as a gift.

1. In the **Membership** sales organization folder, select the **Gift Card Program.** Right click in the **Gift Card Program** field and select **New**.

2. To create your **Gift Membership Sales Line Type**, click the ellipsis button and enter "Gift Membership" as the name of the **Sales Line Type**.

3. Create an account for this program to be reported to (i.e. Gift Membership Program).

4. Create the name of the program and place it in the **Gift Card Program Name** field as well as the **Internal Name** field.

5. Production Type must be set as *Internal* gift program.

6. **Project Code** should also be set up as **Gift Memberships**.

7. In the **Suggested Amounts** field, enter the total amounts of your membership prices that you wish to be available for gifting.

8. Set the program on sale by clicking the **Sales Channels** tab, and select the options that are available to your customers. Make sure to set both the on-sale **Start Date** and the **End Date**.
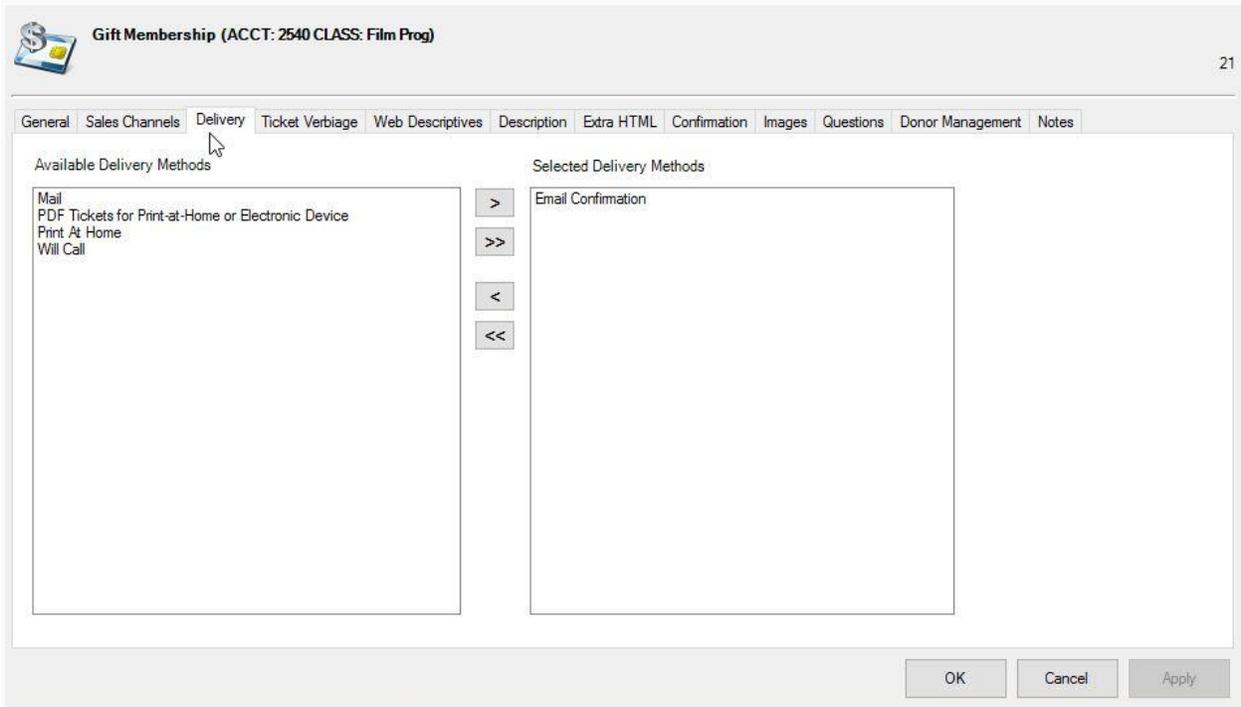
9. Click on the **Delivery** tab and move **Email Confirmation** to the **Selected Delivery Methods** column. This will send the purchaser (person giving the gift) a detailed email confirming the order.

10. Click the **Descriptions** & **Confirmation** tabs to include text if applicable.

11. Click the **Questions** tab to set up and apply the series of Questions that will be used to get the information about the person receiving the Gift Membership.

NOTE: These *must* be set up to gather information about the person receiving this membership and allow your staff to process the appropriate membership type and level. See the image below for the questions that we recommend that you use. To create these questions, click the Ellipsis button. For more information on how to create questions, see Creating Order Questions.

Question Text	Type	Display Group	Usage	Sequence	Required	Enabled
Recipient Name(s)	Textbox	Membership Gift Information	Order - Each Quantity	10	True	True
Recipient's Full Address	Textbox	Membership Gift Information	Order - Each Quantity	20	True	True
Recipient's Phone Number	Textbox	Membership Gift Information	Order - Each Quantity	30	False	True
Type of Gift Membership	Dropdown	Membership Gift Information	Order - Each Quantity	5	True	True
Would you like the membership sent to your (the buyer's) addr...	Radio Button List	Membership Gift Information	Order - Each Quantity	50	True	True
Gift Message to Recipient (+ From Whom the Gift Should be ...	Text Area	Membership Gift Information	Order - Each Quantity	40	False	True
Recipient's Email Address	Textbox	Membership Gift Information	Order - Each Quantity	31	False	True

12. Once you have created your questions, add them to the **Selected Questions** column.

For information on how to process the orders, see the [How to Process/Sell Gift Memberships](#).