

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 do not automatically 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.

The screenshot shows a software window titled "Gift Card Program: [Redacted] Gift Membership". The window has a tabbed interface with the following tabs: General, Sales Channels, Delivery, Ticket Verbiage, Web Descriptives, Description, Extra HTML, Confirmation, Images, Questions, Donor Management, and Notes. The "General" tab is active.

The window contains the following fields and controls:

- Sales Line Type:** Gift Membership (dropdown menu)
- Account:** Gift Membership Program (dropdown menu)
- Gift Card Program Name:** [Redacted] Gift Membership (text field)
- Internal Name:** [Redacted] Gift Membership (text field)
- Display Sequence:** 0 (spin box)
- Color:** (empty dropdown menu)
- Production Type:** Internal (selected radio button), External (radio button)
- Gift Card Format:** No Ticket Print (dropdown menu)
- Project Code:** Gift Memberships (dropdown menu)
- Enabled:**
- Suggested Amounts:** 0.00 (spin box) with an "Add" button. Below this is a list of suggested amounts: \$30.00, \$45.00, \$70.00, \$100.00, \$150.00, \$250.00, \$400.00, \$500.00, \$800.00, \$1,000.00, \$1,500.00. There is also a checkbox for "Allow Customer to Enter Amount".

At the bottom right of the window are three buttons: "OK", "Cancel", and "Apply".

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**.

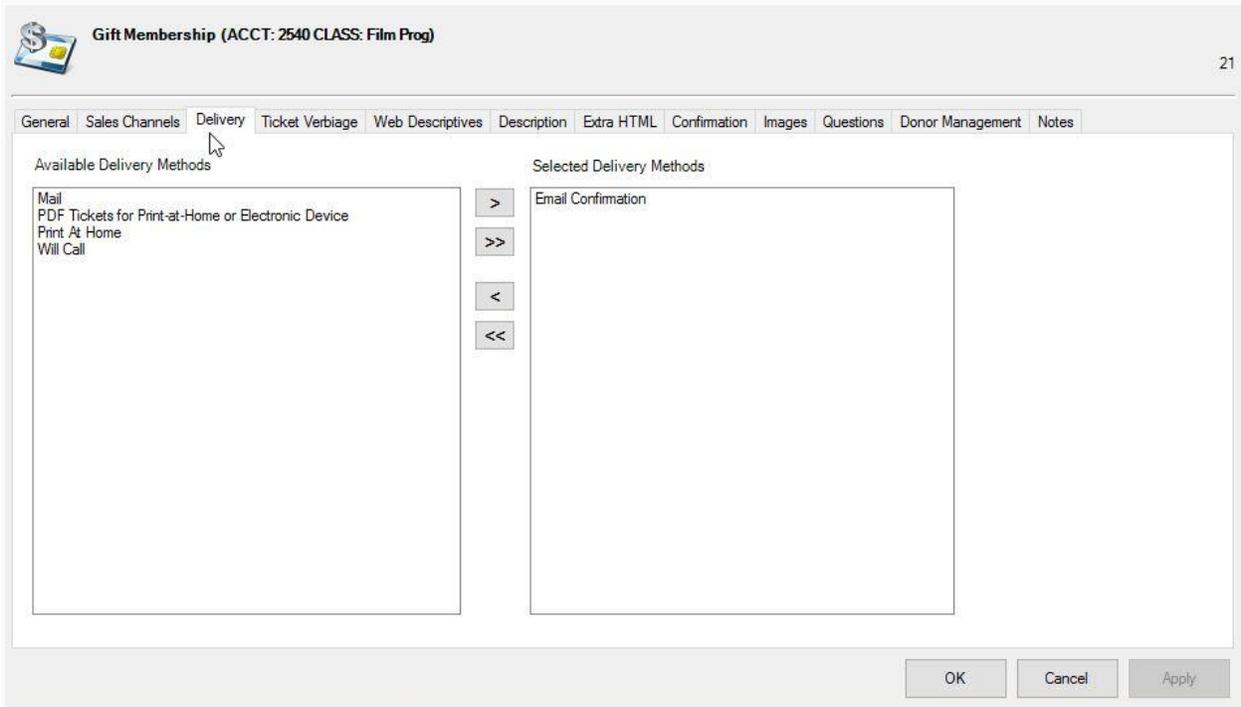
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General **Sales Channels** Delivery Ticket Verbiage Web Descriptives Description Extra HTML Confirmation Images Questions Donor Management Notes

Sales Channel	Start Date	End Date	Enabled	Display Message
<input checked="" type="checkbox"/> AMS Advanced	10/20/2014 12:00 AM	10/23/2050 12:00 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> AMS Box Office			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> AMS Member			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Web Member			<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Web Standard	10/20/2014 12:00 AM	10/23/2050 12:00 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

OK Cancel Apply

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) address?	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.

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General Sales Channels Delivery Ticket Verbiage Web Descriptives Description Extra HTML Confirmation Images Questions Donor Management Notes

Available Questions Selected Questions

Recipient Name(s)
Recipient's Full Address
Recipient's Phone Number
Type of Gift Membership
Would you like the membership sent to your (the bu...
Gift Message to Recipient (+ From Whom the Gift Si
Recipient's Email Address

OK Cancel Apply

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