MemberClicks

Everything you need to know about the **MemberClicks Upgrade**.

In April of 2015, MemberClicks released a brand new membership management platform to the association world.

Unlike previous releases that added features and enhancements to the existing MemberClicks software, this new platform was written from the ground up. Doing this allowed us to use new technologies, deliver better performance and create a better experience that was based on 15 years of working firsthand with small-staff associations.

Upon the release of the new platform, simply called "MemberClicks," we began an upgrade program for customers on our existing platform, now called "MemberClicks Classic." While we plan to keep supporting the MemberClicks Classic platform well into the future, the goal of the upgrade program is to help MemberClicks Classic customers make a smooth transition to the new platform.

Since the new MemberClicks platform was written from the ground up, the upgrade process is similar to our implementation process — most data needs to be re-imported and the system properly configured for each organization. That's why we have a dedicated Upgrade Team ready to help with this process and answer any questions you have along the way.

Before you begin your upgrade, read through this document! Here you'll find:

- **Answers to frequently asked questions about the process**
- **A timeline of what to expect**
- **A comparison of our two platforms**
- **Pricing details for the new platform**
- **Info on how to take the next step to schedule your upgrade (if you haven't already)**

Frequently-asked questions about the new MemberClicks platform:

1   **How do we sign up for an upgrade?**

Just visit **www.memberclicks.com/upgrade**! After signing up, you will have the opportunity to schedule your upgrade for your preferred month.

2   **How much does it cost to change?**

While there is no fee associated with the upgrade itself, customers interested in upgrading will need to be on one of our current pricing plans, which are detailed later in this document.

Our new pricing plans no longer have any variable costs. The MemberClicks transaction fee does not apply to these new plans, as they are simple flat-rate prices. *Note: These plans are available to you now, even while on the Classic platform.*

The MemberClicks product (new platform) is compatible with two payment processors, Moolah Payments and Authorize.net. If you are not currently using one of those two processors for credit card payments, you will need to be setup with one prior to completing your upgrade. There is a fairly significant discount to you when you use our preferred payment processor, Moolah Payments.

3   **Can we take information from our current system to the new product? (ex. form receipts, message history)**

In order to truly capitalize on the benefits of the new system, MemberClicks will need to review and optimize your current system for the new platform.

As it stands today, there are some things that are not able to transfer over from Classic, including:

- *Message and transaction history*
- *Previously posted E-list messages*
- *Previously posted Committee messages*
- *Previously posted Community forum posts*
- *Existing Social community circles, posts, etc.*
- *Events on the calendar (events on the Classic calendar can be manually rebuilt in the new system)*
- *Existing invoices*
- *Profile pictures members have uploaded to the directory*

FAQ

4 **Are there any features that are available in MemberClicks Classic that aren't currently available in the new product?**

While the new product offers a better user experience, more powerful options for dues automation, organizational memberships and many other new features, there are a few things that currently exist in MemberClicks Classic that aren't yet available.

The list below highlights a selection of those features.

- *Payment Processor compatibility with processors other than Moolah Payments and Authorize.net*
- *Installment-type recurring payments (automatic annual dues are the only recurring payments currently available)*
- *CDYNE Integration, used for Address Verification Services*
- *Print Center*
- *The ability to transfer receipts from one profile to another*
- *Tax and Shipping calculations (tax and shipping can be built into the price of an item)*
- *Monthly/weekly User Modification Email*
- *The ability for members to submit events for addition directly to the calendar*

5 **What's the timeline for my organization to upgrade to the new platform?**

The upgrade process typically takes 30-60 days, depending on your ability to be responsive to us as we walk through the upgrade together.

6 **Does my site have to go down as part of the transition to the new product?**

No; moving to the new product does not require any downtime.

7 **Can I keep my domain, org ID, and email addresses?**

Yes!

8 **Will the upgrade include a new website and responsive template?**
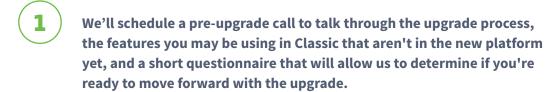
Yes! For a limited time, we are offering a free responsive template and migration of existing MemberClicks site content as part of the upgrade process.

During the upgrade, you'll have several consultations with our Upgrade Team to talk you through the process, discover your needs and customize the system for your organization. Several steps of the upgrade involve filling out short documents or giving us other info we need to make sure your system is correctly configured, so the sooner we hear back from you with this "homework," the faster your upgrade will go.

Here's an outline of what to expect during the process:

1 We'll schedule a pre-upgrade call to talk through the upgrade process, the features you may be using in Classic that aren't in the new platform yet, and a short questionnaire that will allow us to determine if you're ready to move forward with the upgrade.

Homework: You'll fill out an Account Settings document, and provide MemberClicks with an export of the income accounts from your accounting software.

2 We'll schedule a call with you to walk through financials, Attributes, Member Types, and Groups, and to discuss the automated renewal process the new platform offers.

Homework: You'll fill out the Notification Settings document and review your attributes from Classic.

3 MemberClicks begins setting up the new database structure based on our discussions.

4 We'll schedule a call to discuss forms and walk through setting one up.

Homework: You'll fill out a Form Setup document to let us know which forms we should build for you in the new system.

What to expect during upgrade

5 MemberClicks starts building forms. We'll create a membership form for you, and up to 5 other forms.

Homework: You'll receive your login info for the new system, and directions on how to test forms once they are completed. Based on your feedback, we'll provide up to one round of form edits.

6 We'll schedule a call to discuss the data file. MemberClicks will export your data from Classic and manipulate the Excel file to prepare it for import into the new product.

Homework: We may ask you to assist with updates to the import file, especially if your database is using a parent/child structure in Classic.

7 MemberClicks imports and delivers the data file.

Homework: We'll show you how and where to configure permissions and attribute security.

8 Behind the scenes, MemberClicks moves the website content and recreates active e-lists, committees, community forums, etc. from Classic to the new product.

9 We'll schedule a pre-launch call to address remaining questions and concerns, and set an official launch date.

10 Launch! After launch, you'll transition back to working with the Help Team for troubleshooting and support.

Platform Comparison

Curious about what's changed between
MemberClicks **and** *MemberClicks Classic?*
Here's a comparison of the two platforms:

	MemberClicks	**MemberClicks** *Classic*
Website	Member directory and event calendar are mobile-optimized	Member directory and event calendar have a dated look and feel, are not mobile-optimized
Community	E-lists are configured by admin to either send replies to the original sender only, or to reply all	E-lists allow end users to decide whether they want to reply to the original sender or reply all
	Ability to create and color code event categories	No categories for events
	A mini Google Map is automatically included in the event view	'Get directions' link in an event opens Google Maps
	Proximity search allows users to search the directory by address, zip code, city, state with pinpoint accuracy	Zip code radius search allows users to search the directory by zip code
	Links are automatically tracked in Contact Center messages	Links must be manually set to track in Contact Center messages
Database	Members can belong to one Member Type, but multiple Groups (Member Type controls pricing, Group(s) control permissions)	Members can belong to only one Group (Group controls pricing and permissions)
	Built-in grace period option	No grace period option
	12 total renewal reminders, including past due reminders	3 total renewal reminders
	One-click renewal process via auto-generated invoice	Renewal process requires dues renewal form

Comparing products

	MemberClicks	MemberClicks *Classic*
Database (cont.)	Ability to designate multiple key contacts for organizational memberships (Any key contact can register other linked profiles for events or pay the renewal invoice)	One 'parent' for organizational memberships ('Parent' had to register 'children' for events and complete dues renewal)
	Prospects (formerly known as Basic Contacts) are no longer limited in how many custom attributes can be assigned	Basic Contacts are limited to 15 custom attributes
	Added ability to assume a member's profile to see exactly what that member experiences	No easy way to view what a member sees on the site
	Member Number is automatically assigned when a new member joins	Member Number can be set up and added to application forms

	MemberClicks	MemberClicks *Classic*
Forms	More intuitive, user-friendly form builder	Cumbersome form builder
	Multi-purpose forms (Ex: application, renewal, AND event registration – 1 form)	Single purpose forms (Ex: application, renewal, OR event registration – 3 forms)
	Same-page/dynamic field logic	Field logic requires two pages
	Forms have an updated look and feel, are mobile-optimized	Forms have a dated look and feel, are not mobile-optimized
	Styling text in forms through built-in WYSIWYG editor	Styling text in forms requires HTML knowledge
	Improved multi-person registration options and reporting	Difficult to calculate number of registrants with multi-person registrations
	Built-in attendance tracking, including cancellations and no-shows	No easy way to track event attendance, cancellations and no-shows

	MemberClicks	MemberClicks *Classic*
Reporting	Membership and event history viewable from member profile	No easy way to track membership history or event attendance history

Comparing products

	MemberClicks	MemberClicks Classic
Financial	Compatible with Moolah Payments and Authorize.net	Compatible with Authorize.net, Coastal EFT, First American Payment Systems, First Data, Moolah Payments, PayPal, and Payflow Pro
	Ability to create multiple invoice templates (Ex: membership, sponsorship, events) for a different look and feel	All invoices generated have the same look and feel
	All items purchased are separately line itemed out on the invoice	The sum of all items purchased appears as one invoice line item
	Payments are tracked on both sides of payment – when the form is submitted and when the payment is applied	Payments are tracked based on the date the form was submitted
	All sales and payments are tracked via invoice, including those generated by forms and ad hoc invoices	Forms can allow a user to choose invoice as a payment option, but members who pay immediately with a credit card do not receive an invoice
	Auto-dues for monthly, quarterly, or annual memberships	Recurring monthly, quarterly, or annual payments for dues and donations are available. Installment type recurring payments are also available (Ex: 12 payments of $10). Once a recurring payment has been scheduled, it isn't possible to change the scheduled date or amount
	Pricing fields can be tied to different payment processors within the same form (ex. PAC donation through Processor A and membership dues through Processor B can be collected in the same form submission, and will auto-generate two invoices)	Separate forms are required to use multiple payment processors (Ex: PAC donation through Processor A requires one form, membership dues through Processor B requires another)
Other Benefits	Overhauled API	Includes an API
	Overhauled admin interface	

As an existing MemberClicks customer, while there is no fee to upgrade to the new platform, you will need to switch to our current pricing.

When reviewing the new pricing, here are a few important things to keep in mind:

- The MemberClicks transaction fee has been eliminated.

- Service levels that correspond to the number of Custom and Prospect (Basic) profiles are unchanged, as are all other service related features and limits.

- We offer two plan types, annual prepaid and a month-to-month term. The annual prepaid term provides fairly significant savings over the month-to-month plans.

- Only Moolah Payments or Authorize.net may be used for credit card processing. Using our preferred payment processor, Moolah Payments, provides even further discounts (applicable to both annual and month-to-month plans).

- Regardless of term selected, checking account information will need to be submitted at **www.memberclicks.com/updatechecking**. Credit cards are not accepted.

Pricing Details

LEVEL 1

| 300 CUSTOM PROFILES | 900 PROSPECT PROFILES | 12,000 EMAILS PER MONTH |

USING MOOLAH PAYMENTS

$2,850/year *PREPAID
SAVES $504 OVER MONTHLY BILLING
OR
$280/month

USING AUTHORIZE.NET

$3,450/year *PREPAID
SAVES $504 OVER MONTHLY BILLING
OR
$330/month

LEVEL 2

| 1,000 CUSTOM PROFILES | 3,000 PROSPECT PROFILES | 40,000 EMAILS PER MONTH |

USING MOOLAH PAYMENTS

$3,552/year *PREPAID
SAVES $648 OVER MONTHLY BILLING
OR
$350/month

USING AUTHORIZE.NET

$4,152/year *PREPAID
SAVES $648 OVER MONTHLY BILLING
OR
$400/month

LEVEL 3

| 2,500 CUSTOM PROFILES | 7,500 PROSPECT PROFILES | 100,000 EMAILS PER MONTH |

USING MOOLAH PAYMENTS

$4,500/year *PREPAID
SAVES $780 OVER MONTHLY BILLING
OR
$440/month

USING AUTHORIZE.NET

$5,100/year *PREPAID
SAVES $780 OVER MONTHLY BILLING
OR
$490/month

Pricing Details

LEVEL 4

5,000	15,000	200,000
CUSTOM PROFILES	PROSPECT PROFILES	EMAILS PER MONTH

USING MOOLAH PAYMENTS

$5,460/year *PREPAID

SAVES $900 OVER MONTHLY BILLING

OR

$530/month

USING AUTHORIZE.NET

$6,060/year *PREPAID

SAVES $900 OVER MONTHLY BILLING

OR

$580/month

LEVEL 5

10,000	30,000	400,000
CUSTOM PROFILES	PROSPECT PROFILES	EMAILS PER MONTH

USING MOOLAH PAYMENTS

$6,795/year *PREPAID

SAVES $1,116 OVER MONTHLY BILLING

OR

$660/month

USING AUTHORIZE.NET

$7,395/year *PREPAID

SAVES $1,116 OVER MONTHLY BILLING

OR

$710/month

Are you ready to schedule your MemberClicks upgrade?

Fill out the form at

www.memberclicks.com/upgrade

to get the ball rolling!

MemberClicks