



MemberClicks

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



New and improved

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, now called Oasis, 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 Oasis platform, we began an upgrade program for customers on our existing platform, now called “MemberClicks Classic.” While we are still supporting the MemberClicks Classic platform, the goal of the upgrade program is to help MemberClicks Classic customers make a smooth transition to Oasis.

Since Oasis 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.

Have questions before you upgrade? In this document, 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

Here are some of the most common questions about upgrading to Oasis from MemberClicks Classic.

1 How do we sign up for an upgrade?

Just visit memberclicks.com/upgrade where you'll 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. Please email billing@memberclicks.com for details.

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 Oasis product is compatible with two payment processors, Payroc 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, Payroc.

Note: Pricing is subject to change without notice.

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*
- *Existing Social community circles, posts, etc.*
- *Existing invoices*

4 Are there any features that are available in MemberClicks Classic that aren't currently available in Oasis?

While Oasis 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 available. **A selection of those features is listed below.**

- *Payment Processor compatibility with processors other than Payroc and Authorize.net*
- *Installment-type recurring payments (automatic annual dues and monthly memberships are the only recurring payments currently available)*
- *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 directly to the calendar*

5 What's the timeline for my organization to upgrade to Oasis?

The upgrade process typically takes 30 days.

6 Does my site have to go down as part of the transition to Oasis?

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 responsive website design?

A new responsive website design is included with your upgrade at no cost! If you're happy with your current website design, or you're already using a responsive design, it will carry over when your organization is upgraded.

Note: If you are interested in updating your website with a responsive design prior to upgrading, that option is available to you as a professional service. Contact help@memberclicks.com to learn more.

9 Can I roll back the upgrade?

No. It's a one-way conversion.



Platform Comparison

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

Oasis
by 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.

2

Ability to create and color code event categories.

No categories for events.

3

A mini Google Map is automatically included in the event view.

'Get directions' link in an event opens Google Maps.

4

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.

5

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).

2

Built-in grace period option.

No grace period option.

3

12 total renewal reminders, including past due reminders.

3 total renewal reminders.

4

One-click renewal process via auto-generated invoice.

Renewal process requires dues renewal form.

Oasis
by MemberClicks

MemberClicks Classic

Database
Continued

	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).
6	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.
7	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.
8	Member Number is automatically assigned when a new member joins.	Member Number can be set up and added to application forms.
9	Created a CE transcript where admins and/or members can add CE credits to create an ongoing transcript.	No built-in option for tracking CE credits.

Forms

	More intuitive, user-friendly form builder.	Cumbersome form builder.
2	Multi-purpose forms (Ex: application, renewal, AND event registration – 1 form).	Single purpose forms (Ex: application, renewal, OR event registration – 3 forms).
3	Same-page/dynamic field logic.	Field logic requires two pages.
4	Forms are mobile-optimized, with updated look.	Forms are not mobile-optimized and look dated.
5	Styling text in forms through built-in WYSIWYG editor.	Styling text in forms requires HTML knowledge.
6	Improved multi-person registration options and reporting.	Difficult to calculate number of registrants with multi-person registrations.

Oasis
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MemberClicks Classic

Forms
Continued

8

Built-in attendance tracking, including cancellations and no-shows.

No easy way to track event attendance, cancellations and no-shows.

An optional submission management solution, Review Panel, often used for calls for papers, proposals, speakers, awards, etc.

No built-in option for reviewing/rating form submissions.

Reporting

Membership and event history viewable from member profile.

No easy way to track membership history or event attendance history.

Financial

Compatible with Payroc and Authorize.net.

Compatible with Authorize.net, Coastal EFT, First American Payment Systems, First Data, Payroc, PayPal, and Payflow Pro.

2

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.

3

All items purchased are separately line itemed out on the invoice.

The sum of all items purchased appears as one invoice line item.

4

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.

5

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.

6

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.

Oasis
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MemberClicks Classic

Financial
Continued

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.

2

Overhauled admin interface.

Pricing Details

As an existing MemberClicks customer, while there is no fee to upgrade to Oasis, you will need to switch to our current 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 Payroc or Authorize.net may be used for credit card processing. Using our preferred payment processor, Payroc, 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 memberclicks.com/updatechecking. Credit cards are not accepted.

Ready to see for **yourself?**



Fill out the form at
memberclicks.com/upgrade
to get the ball rolling and
schedule your upgrade!