Social Good
Software

# FAQ Digital membership cards

Why do we need to set the transaction date as "on or after yesterday?"

The transaction date set as this will accommodate for queries that are purchased late at night, such as those at 11:30 PM. Altru may be set with a different time than your organization, so we need to account for everyone possible.

If the constituent email is blank
on the query what happens?

The query accounts for both constituents with a primary email and those whose email is blank. If you have any issues with grabbing the correct constituents, make sure you put the two email records in the "include" box in parentheses. Using "or" instead of "and" will ensure that any one of those records will pop up rather than nothing (since records generally have one or the other, not both).

# Why is the Membership Level displayed twice?

One of the "Membership Level" fields is used for displaying the level visually in the email, and the second is to enforce the membership level upon clicking on the link. If a constituent has multiple memberships connected to the name, this query will force the displayed membership to be this particular level you are writing the query for. (Ex. Tom has two active memberships under his name; if the query is built for Tier 1 and NOT Tier 2, Tom will click on the link and see his Tier 1 benefits.)

I cannot find a note type that says "Digital Membership Card – Individual Membership." How can I add this note type?

In Altru, go to Administration > Code Tables > Ticketing (found on "Category" drop menu) > Sales Order Note Type > Add After clicking on Add, name the new note as "Digital Membership Card – Individual Membership" for use in your query. You cannot set the note type field as this without creating the note type as shown.

Where can a membership originate from?

- Online sales orders – Webforms through Altru via the web
- Daily sales orders
- Advance sales orders
- Auto recurring charge on credit card
- Manual sending of emails for constituent information update
- Back office manual entry
- Back office batch entry
- Auto-renew

What do you need to do when a membership originates?

Verify the name, email and level were entered correctly.

What emails are sent by the sales order method?

Online sales orders

1. Acknowledgment email – Via Altru
2. Digital membership card email – Via Social Good Software

Daily sales orders

1. Digital membership card email – Via Social Good Software

Auto recurring charge on credit card

1. Your credit card is about to get charged – Via Social Good Software
2. Your credit card has been charged – Via Social Good Software

Advance sales orders

1. Digital membership card email – Via Social Good Software

Back office manual entry

1. Digital membership card email – Via Social Good Software

Back office batch entry

1. Digital membership card email – Via Social Good Software

Do I need to email the primary and secondary members separately?

No, we recommend you combine the emails into on

I've updated the information on a constituent record and I want to let them know, how do I do it?

You can manually tag them and this will trigger a new email to go out.

If the System Record ID changes the link they received will no longer work, and a new email will need to be triggered.

Is there a way to display the total number of members?

With the membership card designer,
you can display a number like 10, 15, 25.

Is there a way to display the number of child members?

You can display a number of children – Fields you can display

If a child has the same email address as his/her parent, will that parent receive multiple emails?

We typically just email the primary member not each member

If an update is made to a membership (member name, expiration date, etc.), do the digital membership cards automatically update?

Yes, it will send it out to ios and android automatically

Can we incorporate decals for reciprocal members via the membership card designer?

No, this will need to be done at the design level for the image.