Membership Levels

Menu: Customers / Membership Levels

Feature: Membership

Editions: Cloud, Corporate*

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a) General Tab

Code

Code is a unique value that identifies the membership level.

The value may be referenced by other systems, including during import and export. Accordingly, the value should not normally be changed after the membership level is in use (a clerk must have Change Codes permission to edit a code value once saved).

Name

Name is the name of the membership level – for example, *Bronze*, *Silver* and *Gold*. This can be anything you want, but it should be unique per membership level.

Membership level names are displayed to the public.

Is Default

Select this field if the membership level should be assigned to all new members upon registration. This designation typically indicates the membership level is the basic level, e.g. *Bronze*.

Only one membership level should have the default designation.

Media Field

Use the Media field to set the image that is displayed for the membership level. For example, this image is displayed prominently in the Cart App, along with the member's other membership information.

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- Only a single image can be uploaded.
- This field is required.

The recommended size of membership level images is TODO pixels, or a similar aspect ratio.

b) Loyalty Points Tab

This tab is displayed if the Loyalty Points feature is enabled.

Points Behavior

This field indicates how and if the membership level is automatically adjusted for members depending on their purchase activity. There are two values:

- None indicates that no automatic behavior applies. Use this setting for the default membership level, and/or for any levels that you want to assign manually to members.
- Annual Purchases indicates that the membership level will be assigned automatically if a member reaches Threshold Amount in dollars purchased during a calendar year based on the member's registration date.
    - The year period is calculated from the month end of the member's registration, plus 1 year intervals. For example, if the member registered on July 4 2020, their anniversary dates would be July 31 2021, July 31 2022 etc.

With Annual Purchases points behavior, the member's membership level is not reset to the default membership level to start a new year of activity.

Please contact Kensium if you would like this behavior.

Threshold Amount

The minimum dollar amount of purchases members must make to achieve this membership level, over the time period that is defined in Points Behavior.

For example, if the member's Points Behavior is Annual Purchases and the Threshold Amount is $1000,

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the member must make $1000 within a year of their registration to qualify for the membership level.



If the member qualifies for multiple membership levels based on the threshold, the membership level with the highest threshold amount is applied to the member.

Points Earn Multiplier

This value is applied to all transaction loyalty points calculations to arrive at a final points value for a transaction. The flow is:

- A points subtotal calculated for a transaction, based on applying OnLoyalty loyalty points rules to the items purchased within the transaction.
- That point subtotal is multiplied by the Points Earn Multiplier to calculate the total loyalty points earned for the transaction.

By default this value is 1, but can be changed so that different membership levels earn larger numbers of points. You may want to do this if you'd like to incentivize members to achieve higher membership levels, for example.

Plan Ahead! Ensure that loyalty point rule values, the loyalty point earn multiplier, the loyalty points redeemed per $, and envoy points earn ratio (if applicable) make sense for your organization.

Points Redeemed per $

This field indicates the number of points that are redeemed for each dollar added to a gift card. For example, if this value is 10, it takes 10 points to equal $1 on a gift card.

Plan Ahead! Ensure that loyalty point rule values, the loyalty point earn multiplier, the loyalty points redeemed per $, and envoy points earn ratio (if applicable) make sense for your organization.

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Redeem Points Maximum



This field indicate the number of loyalty points that can be redeemed for gift card(s) by members of the membership level, per calendar month.

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