AC MemberSmart User Guide

Advanced Communities Ltd. registered in England and Wales (No. 6659236) VAT No. 115662818
We Work 30 Churchill Place, Canary Wharf, London E14 5RE United Kingdom
We Work SOMA, 156 2nd Street, San Francisco, CA 94105 USA
sales@advancedcommunities.com +44 20 3051 0075

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Overview

AC MemberSmart is a comprehensive membership management solution built 100% natively on Salesforce. Designed for associations and membership-based organizations, it offers a powerful, customizable platform to manage members, events, payments, content, and more – all in one place.

Key Benefits:

- Centralized member management with a 360-degree view.
- Full control over payments, renewals, donations, and subscriptions.
- Tools to engage members through events, job boards, blogs, and CPD tracking.
- Scalable, flexible, and fully configurable via Salesforce Lightning Flows.

Core Features:

- Member Management
  - Store and view detailed member data via Member Card.
  - Use filters to manage and search members in the Member Directory.
  - Track lifetime value, activity history, and interactions.
- Membership & Subscription Management
  - Create and manage membership products via Salesforce Products and Pricebooks.
  - Configure subscription terms, pricing, and auto-renewals.
  - Collect payments using Stripe or custom payment integrations.
  - Finalize payments via portal or admin-side flows.
- Fundraising
  - Allow members to make donations via the portal.
  - Auto-fill donor forms using member contact data.
- Events
  - Create online, offline, and hybrid events.
  - Support for paid, free, or donation-based pricing models.
  - Event landing pages with customizable tabs and filters.

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- Calendar view to help members track upcoming sessions.

🔹 Directories

- Member Directory: search by name, location, industry, skills, and more.
- Organization Directory: filter by sector or location, view profiles, and contact details.

🔹 eCommerce

- Enable a Shop page to sell physical and digital products.
- Sort items by category, price, or name.

🔹 Job Board

- Employers can post open roles via a form.
- Job seekers can filter by industry, experience, and more.
- Apply directly with resume uploads.
- Job pages include salary, company info, and requirements.

🔹 CPD (Continuous Professional Development)

- Members can log professional activities and time spent.
- Transparent scoring system and file upload support.

🔹 Content & Engagement

- Share news via Blog with categories and tags.
- Enable Chatter Feed for real-time updates and discussions.

AC MemberSmart subscriptions' functionality is built on standard Salesforce objects:

- Products. Membership subscriptions are created as product records.
- Pricebooks. Membership fees are configured with pricebooks.
- Opportunities. Payment obligations are generated with opportunities (optional).

All membership flows – such as registration, renewal, finalise payment – are built using Salesforce Lightning Flows, offering flexibility to support everything from simple to complex multi-page journeys.

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Installation

To install the AC MemberSmart app, you must first install the AC Job Board component due to a dependency on it. You can find the installation link for the AC Job Board here: https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000Fgv13UAB

Once that is complete, proceed with the installation of AC MemberSmart using this link: https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000HEAV4UAP

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Configuration

The following section includes all the required configurations. Please make sure to review all subsections carefully.

Set Up Permissions

The AC MemberSmart package comes with custom objects and fields. For the component to function correctly, you need to provide appropriate access to these objects and their fields.

We recommend using the permission sets provided in a package:

- **MemberSmart Admin**

For internal users. All permissions for membership management purposes.

- **MemberSmart User Base**

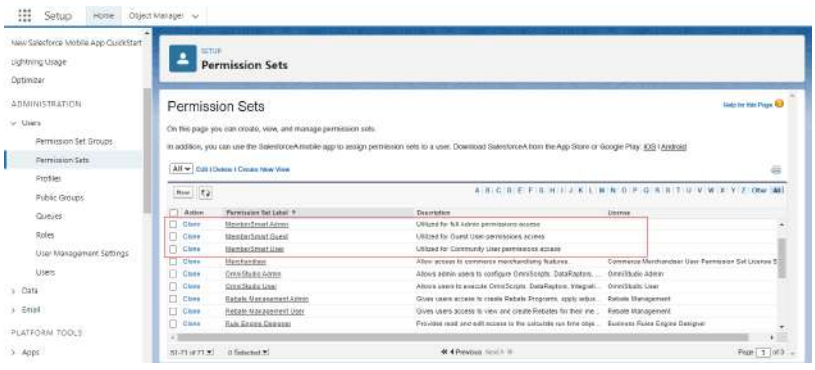
For community users. Allowed: browsing, registering as members and membership management.

- **MemberSmart User Full**

For advanced community users. Allowed: browsing, registering as members and membership management, accessing and editing subscriptions and subscription terms.

- **MemberSmart Guest**

For guest users. Allowed: browsing and registering as members.



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Note Once you assign permission sets, please do not forget to provide access to standard objects manually, as well as admin permissions.

Important We advise assigning two permission sets: one from the package and another extended permission set with access to standard objects and fields.

Once the app is updated, permission sets in the package are automatically updated as well, eliminating the need for manual access adjustments.

You can also set up permissions manually, as shown below.

Object Permissions and Field-Level Security

Custom Objects and Fields

Give users access to the custom objects. The table contains access provided in the permission sets.

Note Additionally to the custom objects, please do not forget to provide access to standard objects.

Objects and Fields	MemberSmart Admin	MemberSmart User Full	MemberSmart User Base	MemberSmart Guest
Account	-	-	-	-
Organisational Member Status	Read/Edit	-	-	-
Membership Activation Date	Read/Edit	Read	Read	-
Contact	-	-	-	-
Unified Member Status	Read			

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Unified Membership Activation Date	Read			
Individual Member Status	Read/Edit	-	-	-
Individual Membership Activation Date	Read/Edit	-	-	-
Membership Duration	Read	-	-	-
Membership Duration (Days)	Read/Edit	-	-	-
Membership Duration Last Modified Date	Read/Edit	-	-	-
Stripe Customer Id	Read/Edit	-	-	-
CPD Activity	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read	Read	-
Title	Read/Edit	Read/Edit	Read/Edit	Read/Edit

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Description	Read/Edit	Read	Read	-
Type	Read/Edit	Read/Edit	Read/Edit	Read/Edit
CPD Objective	Read/Edit	Read/Edit	Read/Edit	Read/Edit
CPD Points	Read/Edit	Read/Edit	Read/Edit	Read/Edit
CPD Objective	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read	Read	-
Name	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Description	Read/Edit	Read	Read	-
Required Points	Read/Edit	Read	Read	-
Start Date	Read/Edit	Read/Edit	Read/Edit	Read/Edit
End Date	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Is Active	Read/Edit	Read	Read	-
Is Expired	Read	Read	Read	-
CPD User Activity	-	-	-	-
Title	Read/Edit	Read/Edit	Read/Edit	Read/Edit

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CPD Activity	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Contact	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Time Spent	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Activity Taken Date	Read/Edit	Read/Edit	Read/Edit	Read/Edit
The activity is completed	-	-	-	-
Membership Payment Method	Read/Create/Edit/Delete/ViewAll Records/Modify AllRecords	Read/Create/Edit/Delete	Read/Create/Edit/Delete	-
Name	Read	Read	Read	Read
Account	Read/Edit	Read/Edit	Read/Edit	-
Contact	Read/Edit	Read/Edit	Read/Edit	-
Stripe Payment Method Id	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Currency ISO	Read/Edit	Read/Edit	Read/Edit	-
Last 4	Read/Edit	Read/Edit	Read/Edit	-
Brand	Read/Edit	Read/Edit	Read/Edit	-

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Bank Name	Read/Edit	Read/Edit	Read/Edit	-
Holder's Name	Read/Edit	Read/Edit	Read/Edit	-
Account Holder Type	Read/Edit	Read/Edit	Read/Edit	-
Expiration Month	Read/Edit	Read/Edit	Read/Edit	-
Expiration Year	Read/Edit	Read/Edit	Read/Edit	-
Expiration Date	Read	Read	Read	-
Is Default	Read/Edit	Read/Edit	Read/Edit	-
Is Unverified	Read/Edit	Read/Edit	Read/Edit	-
Is Visible For Guest	Read/Edit	Read	Read	-
Membership Payment Transaction	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	-	-	-
Name	Read	Read	Read	Read
Account	Read/Edit	-	-	-
Contact	Read/Edit	-	-	-

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Membership Subscription Term	Read/Edit	-	-	-
Payment Method	Read/Edit	-	-	-
Stripe Payment Intent Id	Read/Edit	-	-	-
Total Amount	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Currency ISO	Read/Edit	-	-	-
Transaction Status	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Failing Reason	Read/Edit	-	-	-
Is Visible For Guest	Read/Edit	-	-	-
Is Closed	Read	-	-	-
Membership Subscription	Read/Create/Edit/Delete/ViewAll Records/Modify AllRecords	Read/Create/Edit	Read/Create	Read/Create
Name	Read/Edit	Read/Edit	Read/Edit	Read/Edit

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Title	Read/Edit	Read/Edit	Read/Edit	-
Contact	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Account	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Product	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Trial Membership Subscription Term	Read/Edit	Read	Read	-
Renewal Form	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Status	Read	Read	Read	-
Custom Status	Read/Edit	-	-	-
Start Date	Read/Edit	Read	Read	-
End Date	Read/Edit	Read	Read	-
Paid Through Date	Read/Edit	Read	Read	-
Cancellation Date	Read/Edit	Read	Read	-
Grace Period	Read/Edit	Read	Read	-
Payment Period	Read/Edit	Read	Read	-

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Term Count	Read/Edit	Read	Read	-
Is Individual	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Is Cancelled	Read/Edit	Read	Read	-
Is Visible For Guest	Read/Edit	Read	Read	-
Membership Subscription Term	Read/Create/Edit/Delete/ViewAll Records/Modify AllRecords	Read/Create/Edit	Read/Create	Read/Create
Name	Read	Read	Read	Read
Title	Read/Edit	Read/Edit	Read/Edit	-
Membership Subscription	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Price Book	Read/Edit	-	-	-
Price Book Entry Id	Read/Edit	-	-	-
Total Amount	Read/Edit	Read	Read	Read
CurrencyISO	Read/Edit	Read	Read	Read

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Membership Length	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Payment Frequency	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Payment Form	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Plan	Read/Edit	Read/Edit	Read/Edit	Read/Edit
End Date	Read/Edit	Read	Read	-
Start Date	Read/Edit	Read	Read	-
Is Gift	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Is Connected To Checkout	Read	Read	Read	-
Checkout Order Item Number	Read/Edit	Read/Edit	Read/Edit	-
Checkout Installment Setup Id	Read/Edit	Read/Edit	Read/Edit	-
Renew On UC	Read/Edit	-	-	-
Product	-	-	-	-
Product Name	Read/Edit	Read/Edit	Read/Edit	Read/Edit

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Membership Lengths	Read/Edit	Read	Read	Read
Payment Frequencies	Read/Edit	Read	Read	Read
Subscription Plans	Read/Edit	Read	Read	Read
Renewal Forms	Read/Edit	Read	Read	Read
Default Grace Period	Read/Edit	Read	Read	Read
Default Payment Period	Read/Edit	Read	Read	Read
Default Trial Period	Read/Edit	Read	Read	Read
Is Trial Accessible	Read/Edit	Read	Read	Read
Is Gifting Enabled	Read/Edit	Read	Read	Read
Is Free	Read	Read	Read	Read
Is Subscription Product	Read	Read	Read	Read

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Is Visible For Guest	-	-	-	-
Opportunity	-	-	-	-
Membership Subscription Term	Read/Edit	-	-	-
Subscription Currency ISO	Read/Edit	-	-	-
End Date	Read/Edit	-	-	-
Start Date	Read/Edit	-	-	-
Expiry Paid Date	Read	-	-	-
Is Expired	Read	-	-	-
Bypass Validation Rules	-	-	-	-
Pricebook Relation	Read/Create/Edit/Delete/ViewAll Records/Modify AllRecords	-	-	-
Title	Read/Edit	-	-	-

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Price Book	Read/Edit	-	-	-
Subscription Length	Read/Edit	-	-	-
Instalment	Read/Create/Edit/Delete/ViewAll Records/Modify AllRecords	Read/Create/Edit	Read	-
Name	Read	Read	Read	Read
Title	Read/Edit	Read	Read	-
Contact	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Subscription Term	Read/Edit	Read	Read	-
Opportunity	Read/Edit	Read	Read	-
Status	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Amount	Read/Edit	Read/Edit	Read/Edit	Read/Edit
CurrencyISO	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Due Date	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Expiry Date	Read	Read	Read	-
Close Date	Read/Edit	Read	Read	-

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Interval	Read	Read	Read	-
Is Closed	Read	Read	Read	-
Is Expired	Read	Read	Read	-
Is Ready For Pay	Read	Read	Read	-
Is Ready For Single Pay	Read	Read	Read	-
Log	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	-	-	-
Log Name	Read	Read	Read	Read
Body	Read/Edit	-	-	-
Type	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Triggered	Read/Edit	Read/Edit	Read/Edit	Read/Edit
Apex Line	Read/Edit	-	-	-
Scheduled Job Setting	Read/Create/Edit	-	-	-
Label	Read/Edit	-	-	-

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Class Name	Read/Edit	-	-	-
Job Name	Read/Edit	-	-	-
Job Id	Read/Edit	-	-	-
CRON	Read/Edit	-	-	-
Is Scheduled	Read/Edit	-	-	-
Trial Membership Subscription Term	Read/Create/Edit/Delete	Read/Create	Read/Create	Read/Create
Title	Read/Edit	Read	Read	-
Subscription	Read/Edit	Read	Read	-
Status	Read/Edit	Read	Read	-
Next Term Setup	Read/Edit	Read	Read	-
Duration (Days)	Read/Edit	Read	Read	-
Start Date	Read/Edit	Read	Read	-
End Date	Read	Read	Read	-
Is Closed	Read	Read	Read	-

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Give users access to the standard objects. The table contains access that was not provided in the permission sets due to Salesforce restrictions.
Additionally, the table includes access details for fields that you need to create manually.

Objects and Fields	MemberSmart Admin	MemberSmart User Base	MemberSmart User Full	MemberSmart Guest
Account	Read/Create/Edit/Delete	Read/Edit	Read/Edit	-
BillingAddress	Read/Edit	Read/Edit	Read/Edit	-
Description	Read/Edit	Read	Read	-
Phone	Read/Edit	Read/Edit	Read/Edit	-
Contact	Read/Create/Edit/Delete	Read/Edit	Read/Edit	-
AccountId	Read/Edit	Read/Edit	Read/Edit	-
Email	Read/Edit	Read/Edit	Read/Edit	-
Phone	Read/Edit	Read/Edit	Read/Edit	-
CPD User Activity	Read/Create/Edit/Delete	Read/Create	Read/Create/Edit	-
The activity is completed	Read	Read	Read	-

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Opportunity	Read/Create/Edit/Delete	-	-	-
Amount	Read/Edit	-	-	-
Product	Read/Create/Edit/Delete	Read	Read	Read
Product Description	Read/Edit	Read	Read	Read
Price Book	Read/Create/Edit/Delete	Read	Read	Read
Membership Subscription	Read/Create/Edit/Delete/ViewAll Records/Modify AllRecords	Read/Create/Edit* (optional permission. Need to display Cancel btn on the Member Registration component)	Read/Create/Edit	-

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Membership Subscription Term	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read/Create/Edit* (optional permission. Need to display Cancel btn on the Member Registration component)	Read/Create/Edit	-

Admin User Permissions

- Make sure that your admin user has the following permissions enabled in Permission set – System Permissions:
    - View Setup and Configuration
    - Manage Custom Permissions
    - Customize Application
    - Modify Metadata Through Metadata API Functions
    - View Reports in Public Folders
    - Manage Package Licenses
- Make sure that your admin user has the following permission enabled in Permission set – App Permissions – Flow and Flow Orchestration – Run Flows – enable
- Add a permission to view the Price Books tab in Object Settings – Price Books – Tab Settings = Default On
- Assigned Apps
    - AC Member Directory Enterprise (AC_User_Directory_classic) - visible

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    - AC Member Directory Enterprise (AC_User_Directory) - visible
- Tabs
    - AC Member Directory Enterprise Settings - default On (is visualforce page tab)

Apex Class Access

The list contains access provided in the permission sets.

To set Apex class security manually, go to Setup - Profiles or Permission sets and select a profile or permission set.

Note We recommend using the Enhanced Profile User Interface to see the complete list of available Apex classes.

In the Apex Class Access page or related list, click Edit.

Select the Apex classes that you want to enable from the Available Apex Classes list and click Add.

- Access provided for **admin users** to the following Apex Classes:

MbrSmart.AchFormController

MbrSmart.AccountInfoController

MbrSmart.AddProductToCartController

MbrSmart.ContactInfoController

MbrSmart.CpdContainerController

MbrSmart.DashboardManager

MbrSmart.EngagementScoreSettingsController

MbrSmart.FilesUploaderController

MbrSmart.GeneralSettingsController

MbrSmart.LogNewUserActivityFormController

MbrSmart.MemberCardController

MbrSmart.MemberRegistrationController

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MbrSmart.MembershipManagerController

MbrSmart.MembershipSubscriptionsController

MbrSmart.PaymentProviderContainerController

MbrSmart.PaymentFormController

MbrSmart.PaymentFrequencyController

MbrSmart.PaymentMethodsController

MbrSmart.PaymentMethodsManagerController

MbrSmart.PaymentMethodsProviderController

MbrSmart.PaymentTermsController

MbrSmart.PlaidSettingsController

MbrSmart.ProductEntry

MbrSmart.SettingsController

MbrSmart.StripePaymentElementController

MbrSmart.StripeSettingsController

MbrSmart.ProductEntryGroupController

MbrSmart.FinalisePaymentController

MbrSmart.GiftMembershipBtnController

MbrSmart.PaymentBtnController

MbrSmart.MembershipPlanController

- Access provided for **external users** to the following Apex Classes:

MbrSmart.AchFormController

MbrSmart.AccountInfoController

MbrSmart.ContactInfoController

MbrSmart.CpdContainerController

MbrSmart.DashboardManager

MbrSmart.EngagementScoreSettingsController

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MbrSmart.FilesUploaderController

MbrSmart.GeneralSettingsController

MbrSmart.LogNewUserActivityFormController

MbrSmart.MemberCardController

MbrSmart.MemberRegistrationController

MbrSmart.MembershipDetailsWrapperController

MbrSmart.MembershipManagerController

MbrSmart.MembershipSubscriptionsController

MbrSmart.PaymentProviderContainerController

MbrSmart.PaymentFormController

MbrSmart.PaymentFrequencyController

MbrSmart.PaymentMethodsController

MbrSmart.PaymentMethodsManagerController

MbrSmart.PaymentMethodsProviderController

MbrSmart.PaymentTermsController

MbrSmart.PlaidSettingsController

MbrSmart.ProductEntry

MbrSmart.StripePaymentElementController

MbrSmart.StripeSettingsController

MbrSmart.ProductEntryGroupController

MbrSmart.FinalisePaymentController

MbrSmart.AddProductToCartController

MbrSmart.GiftMembershipBtnController

MbrSmart.PaymentBtnController

MbrSmart.MembershipPlanController

- Access provided for **guest users** to the following Apex Classes:

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MbrSmart.AchFormController

MbrSmart.MemberRegistrationController

MbrSmart.PaymentProviderContainerController

MbrSmart.PaymentFormController

MbrSmart.PaymentFrequencyController

MbrSmart.PaymentMethodsController

MbrSmart.PaymentTermsController

MbrSmart.ProductEntry

MbrSmart.StripePaymentElementController

MbrSmart.ProductEntryGroupController

MbrSmart.AddProductToCartController

MbrSmart.PaymentBtnController

MbrSmart.MembershipPlanController

Flow Access

The list contains access provided in the permission sets.

To set Flow access manually, go to Setup - Permission set and select a permission set.

In the Flow Access page or related list, click Edit.

Select the flows that you want to enable from the Available Flows list and click Add.

- Access provided for **admin users** to the following Flows:

MbrSmart.Member Registration

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MbrSmart.Subscription Renew

MbrSmart.Finalise Payment

- Access provided for **external users** to the following Flows:

MbrSmart.Member Registration

MbrSmart.Subscription Renew

MbrSmart.Finalise Payment

- Access provided for **guest users** to the following Flows:

MbrSmart.Member Registration

Visualforce Page Access

The list contains access provided in the permission sets.

If you prefer to set access manually, go to Setup - Permission Sets and select a permission.

In the Visualforce Page Access page or related list, click Edit.

Select the pages that you want to enable from the Available Visualforce Pages list and click Add.

- Access provided for **admin users** to the following Visualforce Pages:

MbrSmart.PlaidLink

MbrSmart.StripePaymentElement

- Access provided for **external users** to the following Visualforce Pages:

MbrSmart.PlaidLink

MbrSmart.StripePaymentElement

- Access provided for **guest users** to the following Visualforce Pages:

MbrSmart.PlaidLink

MbrSmart.StripePaymentElement

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Custom Metadata Types

The list contains access provided in the permission sets.

- Access provided for **admin users** to the following Custom Metadata Types:

MbrSmart.Engagement Score Setting

MbrSmart.MemberSmart General Setting

MbrSmart.Payment Service Setting

MbrSmart.Period to value mapping

MbrSmart.Trigger Config

MbrSmart.Checkout Settings

- Access provided for **external users** to the following Custom Metadata Types:

MbrSmart.Engagement Score Setting

MbrSmart.MemberSmart General Setting

MbrSmart.Payment Service Setting

MbrSmart.Period to value mapping

MbrSmart.Checkout Settings

- Access provided for **guest users** to the following Custom Metadata Types:

MbrSmart.MemberSmart General Setting

MbrSmart.Payment Service Setting

MbrSmart.Period to value mapping

MbrSmart.Checkout Settings

Sharing Settings

Object	Default Internal Access	Default External Access
CPD Activity	Public Read Only	Public Read Only

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CPD Objective	Public Read Only	Public Read Only
CPD User Activity	Controlled by Parent	Controlled by Parent
Instalment	Public Read Only	Private
Instalment Payment Transaction	Controlled by Parent	Controlled by Parent
Log	Public Read Only	Private
Membership Payment Method	Public Read Only	Private
Membership Payment Transaction	Public Read Only	Private
Membership Subscription	Public Read Only	Private
Membership Subscription Term	Public Read Only	Private
Opportunity Payment Transaction	Controlled by Parent	Controlled by Parent
PricebookRelation	Public Read Only	Private
Scheduled Job Setting	Public Read Only	Private

Sharing Sets

Sharing Sets allow site users to access records that are associated with the same Account or Contact as themselves.

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The following Sharing Sets are included in the package:

- Instalment – Read Only
- Membership Subscription – Read/Write
- Membership Subscription Term – Read/Write
- Trial Membership Subscription Term – Read/Write
- Membership Payment Method – Read/Write

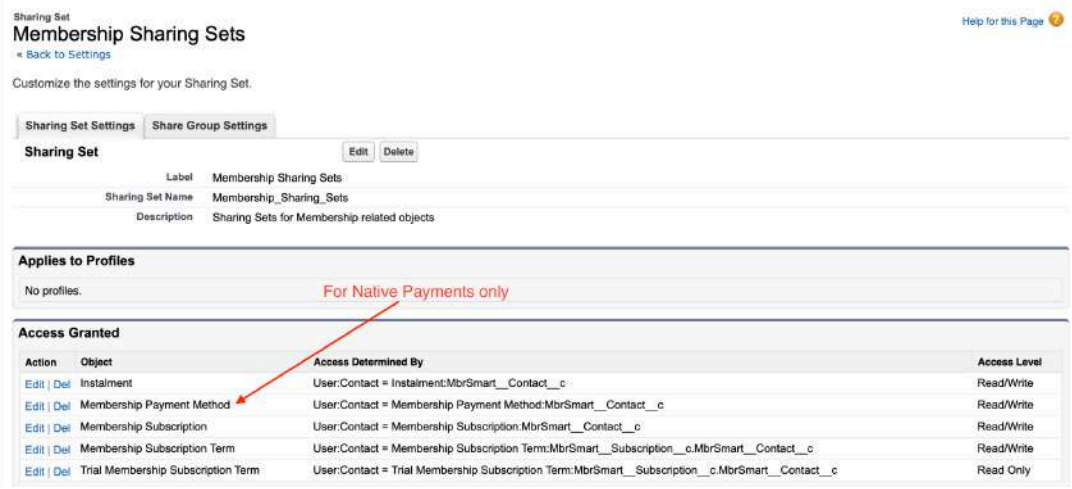
By default, user profiles are not included in these sharing sets. You must add them manually.

A single profile cannot be assigned to more than one Sharing Set simultaneously.

To add profiles, navigate to Digital Experiences → Settings → Sharing Sets. Open the appropriate record, click Edit, and add the required profiles.

Configuration Notes:

- **If your org uses only Individual Memberships**.
  Sharing should be configured using the Contact object. See the screenshot for example setup



  The Membership Payment Method should be configured only if the native payments logic is used in the org, rather than the AC Unified Checkout integration
- **If your org uses Organisational Memberships or both types.**
  Sharing should be configured using the Account object.

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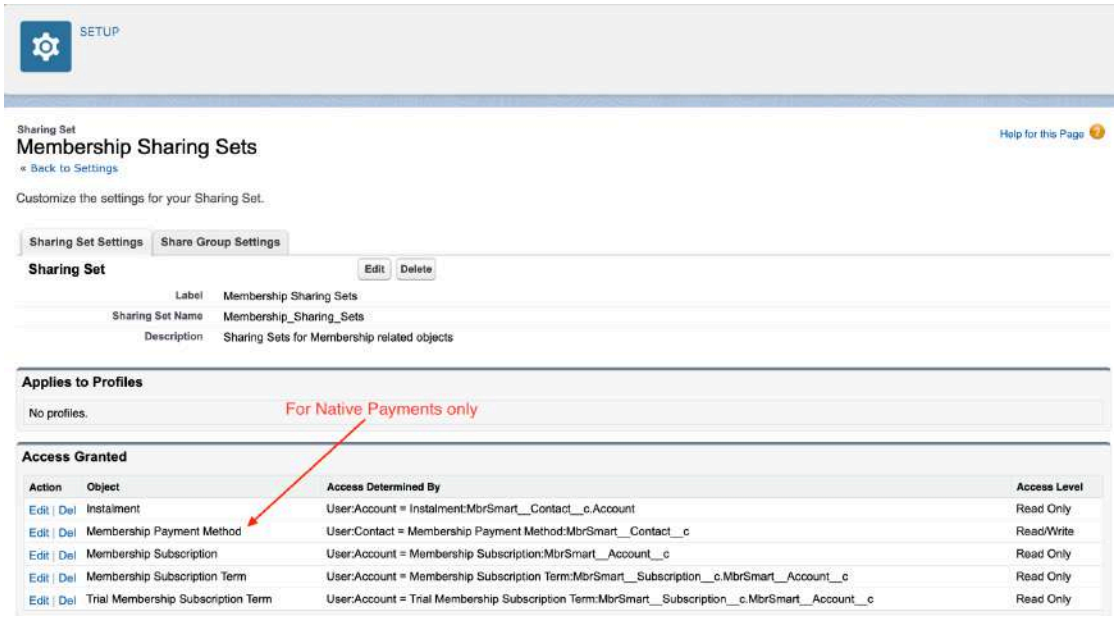

The Membership Payment Method should be configured only if the native payments logic is used in the org, rather than the AC Unified Checkout integration.

Guest User Permissions

To let guest users register as members on site, please provide the following access:

- Assign MemberSmart Guest permission set.
- Create a sharing rule for the Product object using the Is Visible For Guest checkbox as a criteria. Is Visible For Guest = True.

To let guest users upload files when registering as a member, give the following access:

- Setup → Salesforce Files → General Settings → Allow site guest users to upload files

Record Type Assignments

Record type assignments for all relevant profiles:

Membership Payment Methods object – enable custom record types (“ACH”, “Charge Card”, “Bacs”), select and assign the appropriate page layouts.

ACH – record type is used for the payments component for the ACH payments.

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Charge Card – record type is used for the payments component for providing payments through cards (mark as default record type).

Bacs - record type is used for the bank-to-bank transfer between banks in the UK.

Record type assignments for admin user profile:

Products object – enable custom Membership Subscription record type for creating paid membership subscriptions internally and Free Membership record type for creating free membership subscriptions.

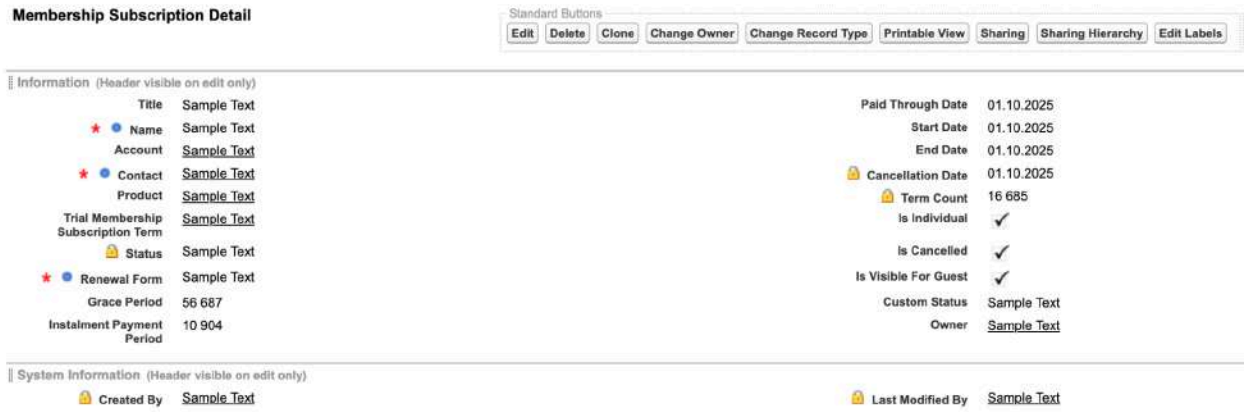
Page Layout Assignments

The following page layouts are automatically assigned to admin users during app installation.

If needed, you can manually assign these layouts to other profiles—see the instructions below for guidance.

Object: Membership Subscriptions

Assign the “Membership Subscription” page layout to the needed profiles (System Admin) through Setup - Object Manager - Membership Subscription - Page Layout - Page Layout Assignment.



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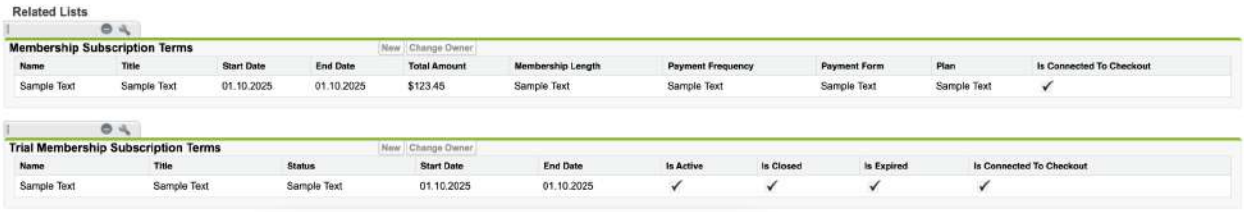
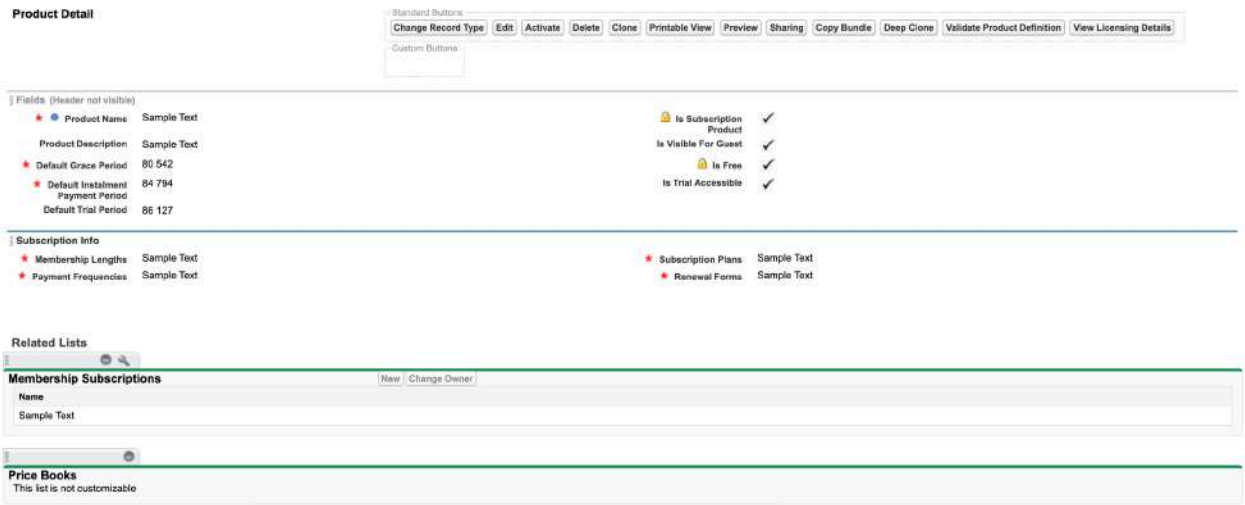


Note The layout contains both the Contact and Account fields by default. Your admin can configure the page layout according to your use case. Make sure all the fields are displayed on the layout.

Object: Product

Assign the “Membership Subscription” page layout for paid membership products to the needed profiles (System Admin) through Setup - Object Manager - Product - Page Layout - Page Layout Assignment.



Assign the “Free Membership” page layout for free membership products to the needed profiles (System Admin) through Setup - Object Manager - Product - Page Layout - Page Layout Assignment.

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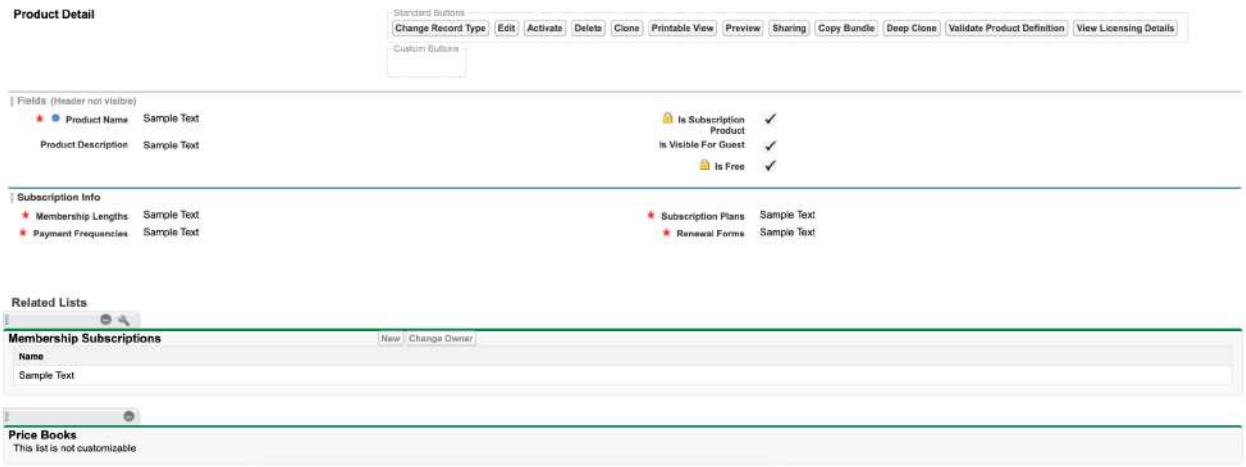
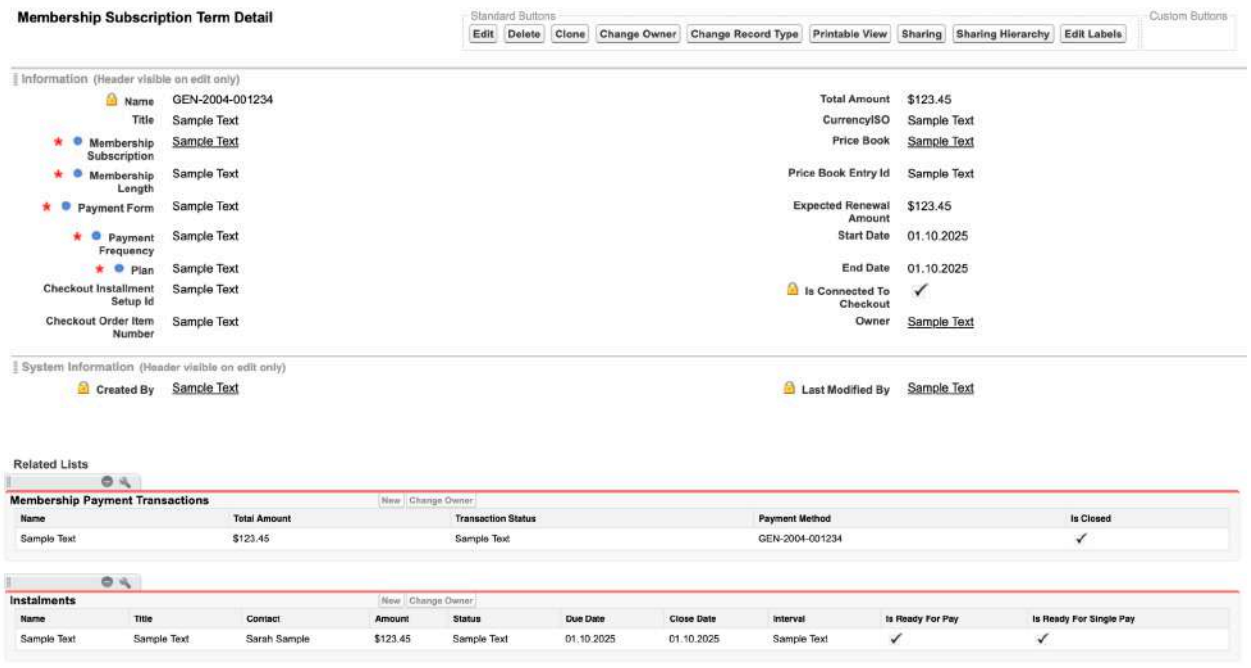


Object: Membership Subscription Term

Assign the “Membership Subscription Term” page layout to the needed profiles (System Admin) through Setup - Object Manager - Membership Subscription Term - Page Layout - Page Layout Assignment.



Object: Trial Membership Subscription Term

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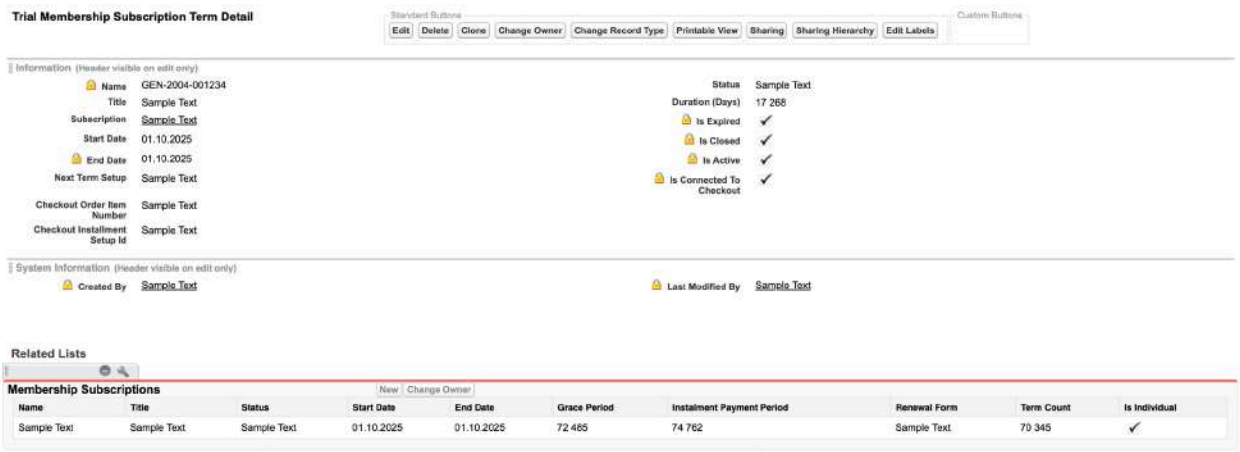
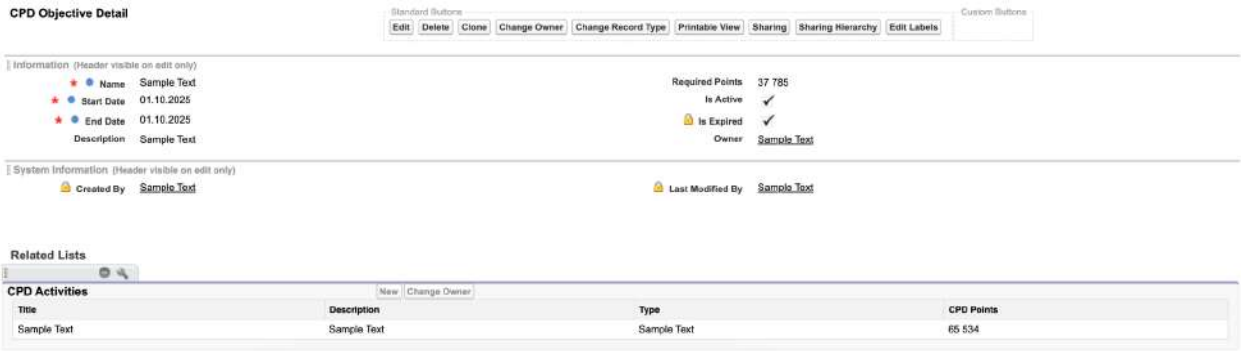


Object: CPD Objective

Assign the “CPD Objective” page layout to the needed profiles (System Admin) through Setup - Object Manager - CPD Objective - Page Layout - Page Layout Assignment.



Object: CPD Activity

Assign the “CPD Activity” page layout to the needed profiles (System Admin) through Setup - Object Manager - CPD Activity- Page Layout - Page Layout Assignment.

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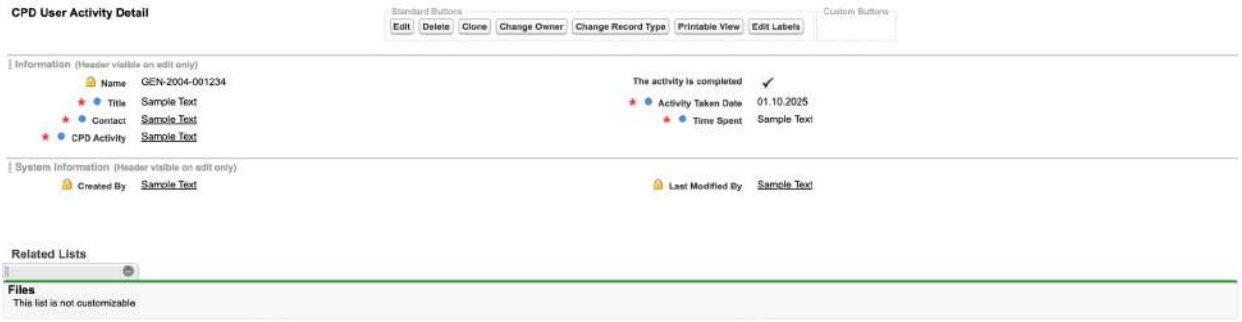
Object: CPD User Activity

Assign the “CPD User Activity Layout” page layout to the needed profiles (System Admin) through Setup - Object Manager - CPD User Activity - Page Layout - Page Layout Assignment.



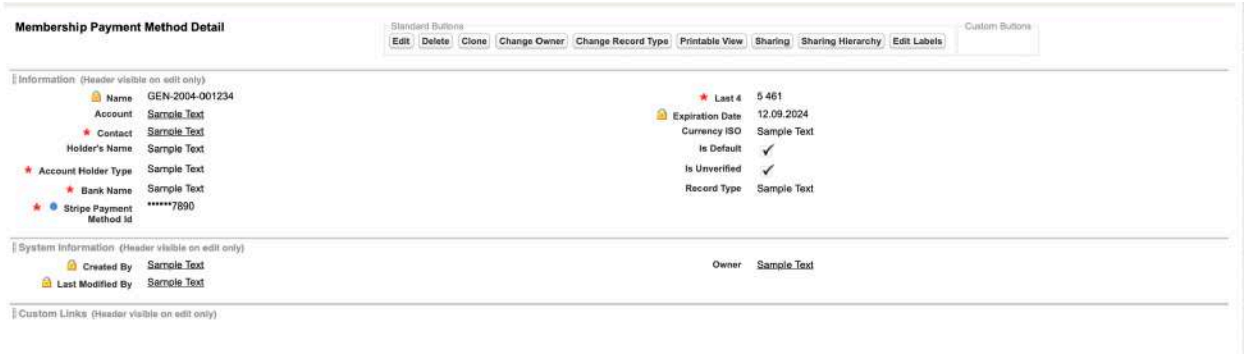
Object: Membership Payment Transaction

Assign the “Membership Payment Transaction Layout” page layout to the needed profiles (System Admin) through Setup - Object Manager - Membership Payment Transaction - Page Layout - Page Layout Assignment.

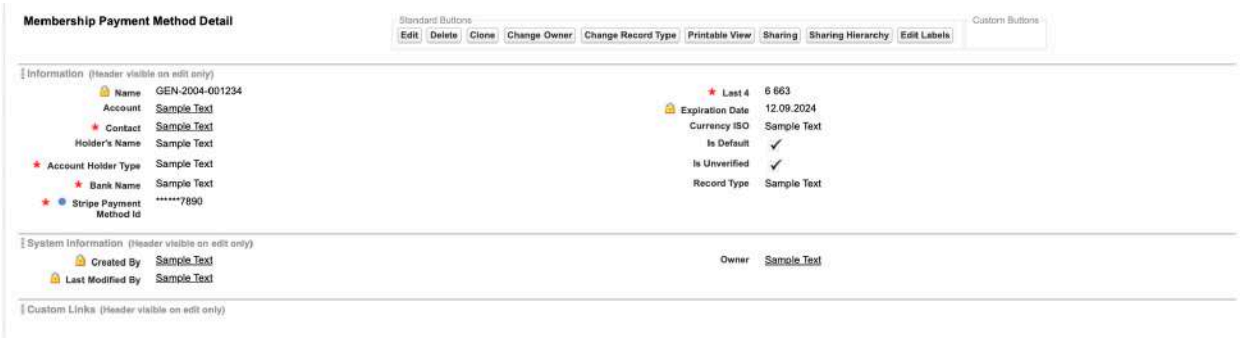
Object: Membership Payment Method

Assign the “ACH Layout”, “Bacs Layout”, and “Charge Card Layout” page layouts to the needed profiles through Setup - Object Manager - Membership Payment Method - Page Layout - Page Layout Assignment.

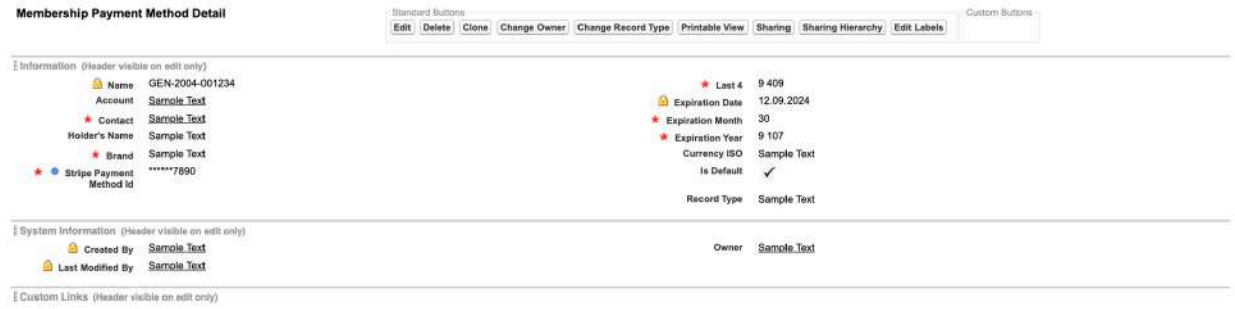
ACH Layout:



Bacs Layout:



Charge Card Layout:



Object: PricebookRelation

Assign the “Pricebook Relation” page layout to the needed profiles through Setup - Object Manager - Pricebook Relation - Page Layout - Page Layout Assignment.

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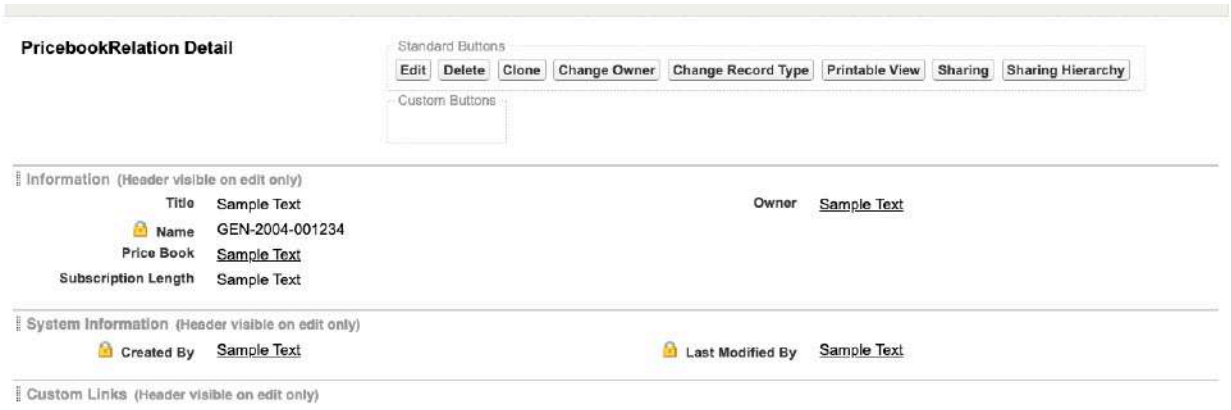
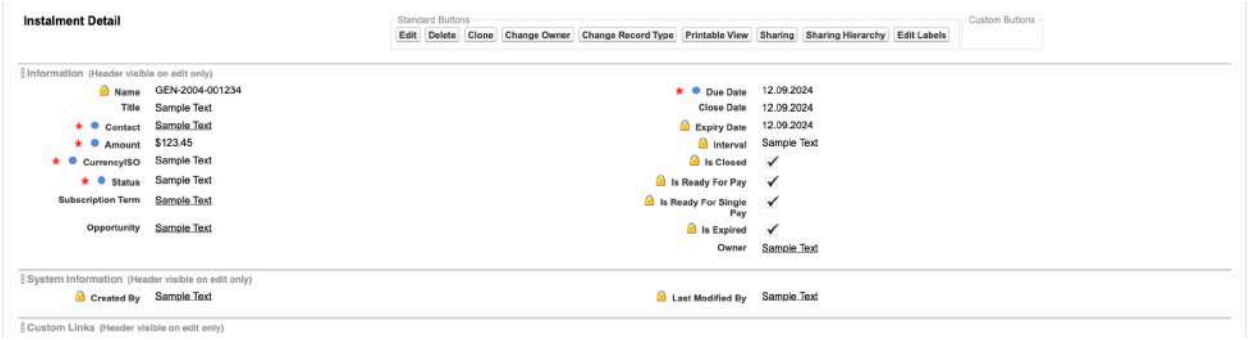


Object: Instalment

Assign the “Instalment” page layout to the needed profiles through Setup - Object Manager - Instalment - Page Layout - Page Layout Assignment.



Object: Scheduled Job Setting

Assign the “Scheduled Job Setting” page layout to the needed profiles through Setup - Object Manager - Scheduled Job Setting - Page Layout - Page Layout Assignment.

Object: Pricing Rule

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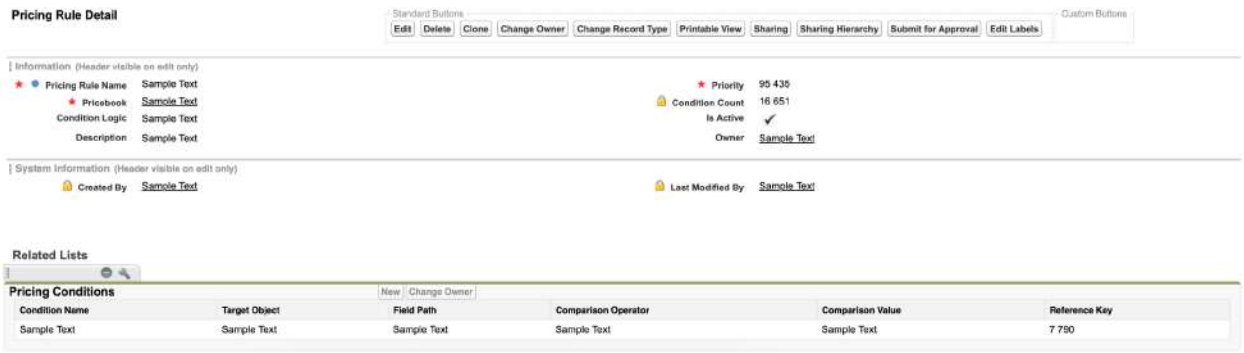
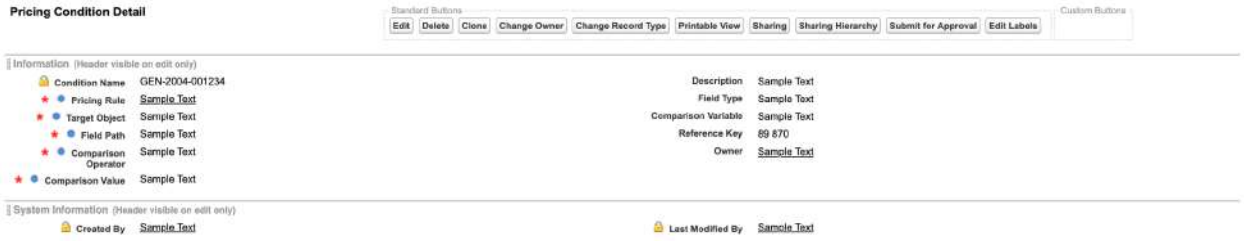
Assign the “Pricing Rule Layout” page layout to the needed profiles through Setup - Object Manager - Pricing Rule - Page Layout - Page Layout Assignment.



Object: Pricing Condition

Assign the “Pricing Condition Layout” page layout to the needed profiles through Setup - Object Manager - Pricing Condition - Page Layout - Page Layout Assignment.



Object: Contact

Assign the “Contact Layout” page layout to the needed profiles through Setup - Object Manager - Contact - Page Layout - Page Layout Assignment.

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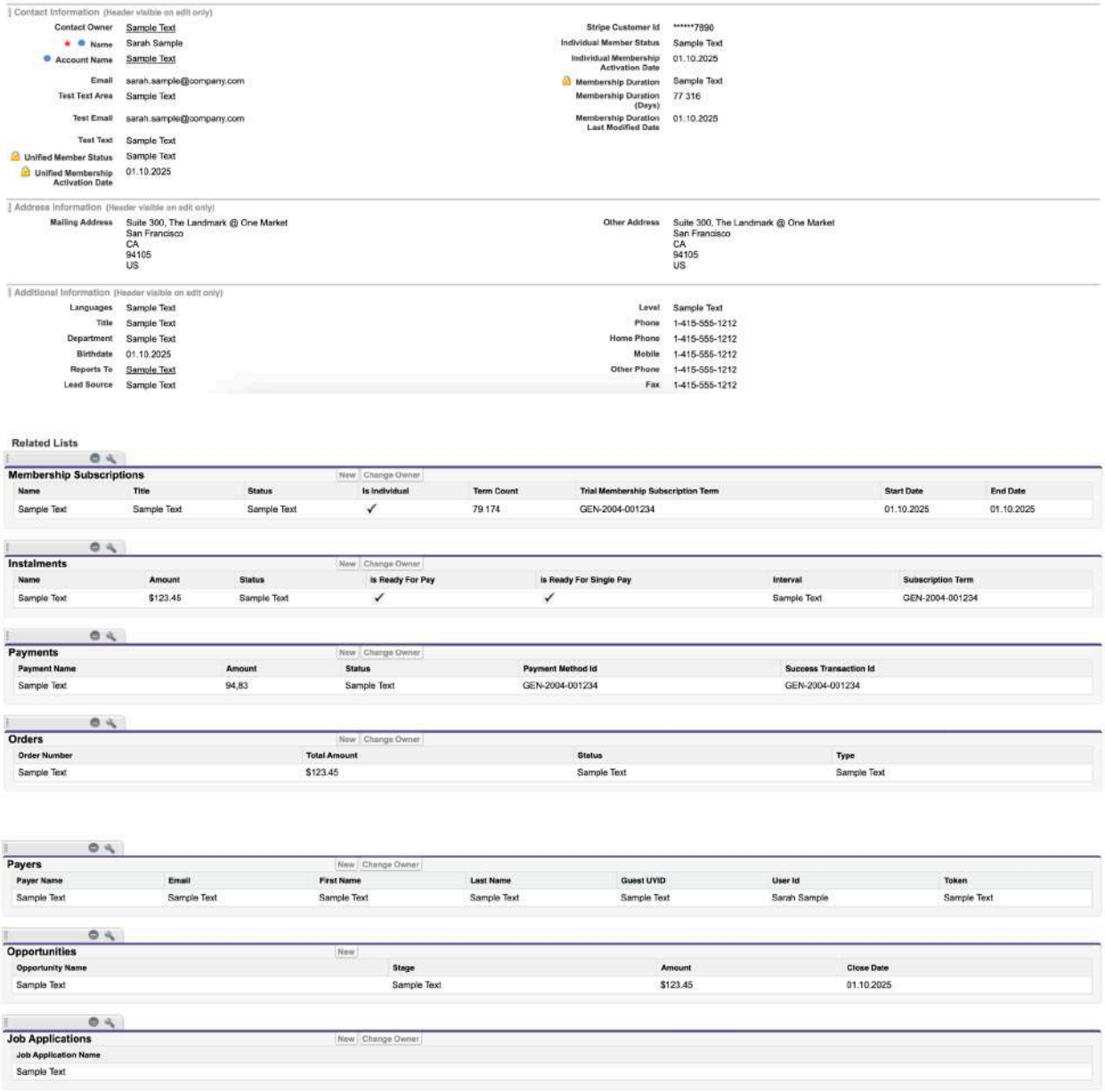

Opportunity Stages

If you prefer to use opportunities together with instalments, manually create and activate Opportunity stages in Setup – Object Manager – Opportunity – Stage field. Add and activate the following stages: *New, Invoiced, Failed, Cancelled, Closed Rejected, Closed Collected.*

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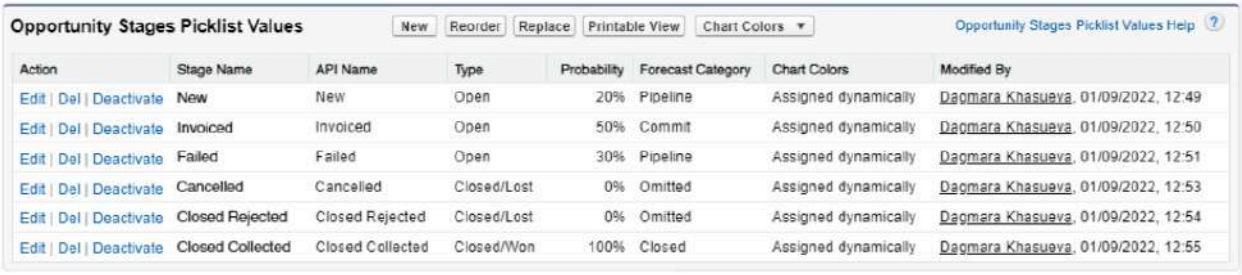
For correct display on the internal environment, the order of values must be configured according to the screen below.

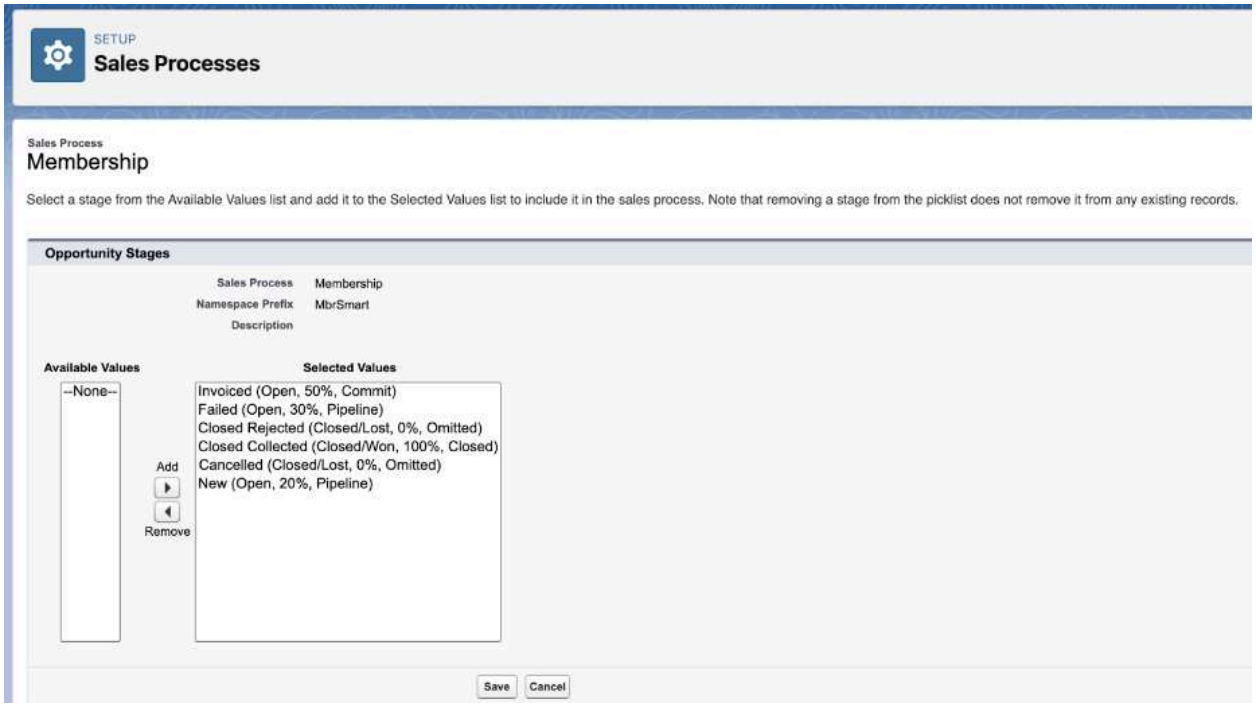


Opportunity Stages Picklist Values

New | Reorder | Replace | Printable View | Chart Colors | Opportunity Stages Picklist Values Help

Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By
Edit | Del | Deactivate	New	New	Open	20%	Pipeline	Assigned dynamically	Dagmara Khasueva, 01/09/2022, 12:49
Edit | Del | Deactivate	Invoiced	Invoiced	Open	50%	Commit	Assigned dynamically	Dagmara Khasueva, 01/09/2022, 12:50
Edit | Del | Deactivate	Failed	Failed	Open	30%	Pipeline	Assigned dynamically	Dagmara Khasueva, 01/09/2022, 12:51
Edit | Del | Deactivate	Cancelled	Cancelled	Closed/Lost	0%	Omitted	Assigned dynamically	Dagmara Khasueva, 01/09/2022, 12:53
Edit | Del | Deactivate	Closed Rejected	Closed Rejected	Closed/Lost	0%	Omitted	Assigned dynamically	Dagmara Khasueva, 01/09/2022, 12:54
Edit | Del | Deactivate	Closed Collected	Closed Collected	Closed/Won	100%	Closed	Assigned dynamically	Dagmara Khasueva, 01/09/2022, 12:55

Add each stage to the Membership sales process by enabling the “Membership” checkbox on the stage creation step or later in Setup - Sales Processes as shown below.



SETUP
Sales Processes

Sales Process
Membership

Select a stage from the Available Values list and add it to the Selected Values list to include it in the sales process. Note that removing a stage from the picklist does not remove it from any existing records.

Opportunity Stages

Sales Process: Membership
Namespace Prefix: MbrSmart
Description:

Available Values: --None--

Add / Remove

Selected Values:
Invoiced (Open, 50%, Commit)
Failed (Open, 30%, Pipeline)
Closed Rejected (Closed/Lost, 0%, Omitted)
Closed Collected (Closed/Won, 100%, Closed)
Cancelled (Closed/Lost, 0%, Omitted)
New (Open, 20%, Pipeline)

Save | Cancel

Opportunity stages are explained below:

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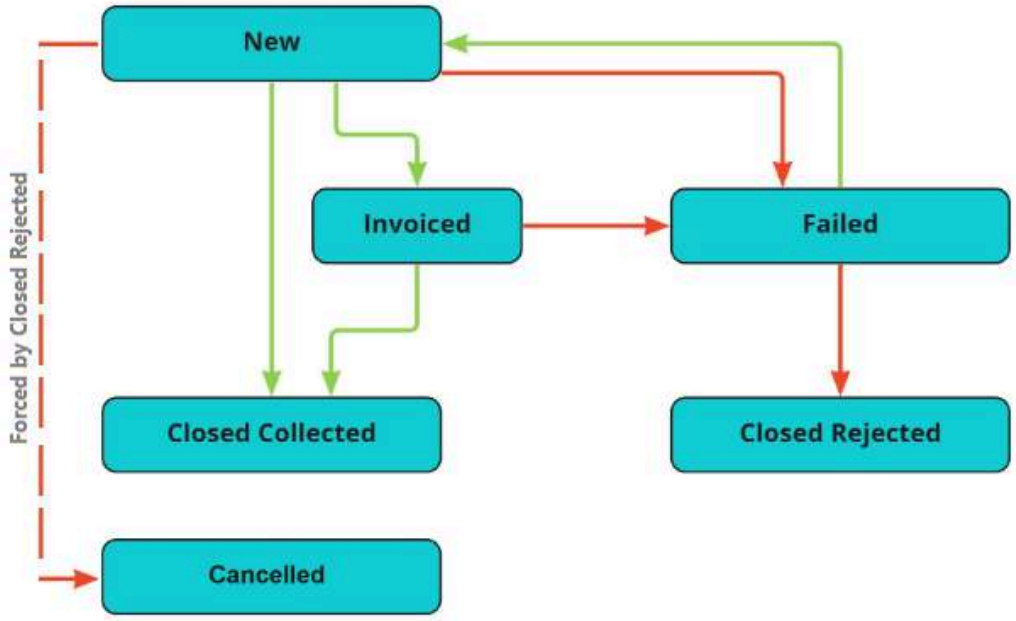

New – Opportunity is created. Opportunities are generated after the subscription term is created.
Invoiced – Invoice is sent.

Pending – Payment is in the processing stage (ACH or Bacs). Payment Transaction (from MemberSmart or Payment Service) was created with “Pending” status.

Closed Collected – Payment is collected (invoice or card).

Failed – Payment failed (insufficient funds, incorrect bank details).

Closed Rejected – Opportunity’s close date expired.

Cancelled – Opportunities are Closed Canceled if one of the previous opportunities' stage changes to Closed Rejected.

If the Opportunity stage changes to *Failed*, and the *Expired Opportunity Scheduler* scheduled job is enabled (the job checks whether the payment deadline of the Failed opportunity has expired – Expiry Paid Date field on the Opportunity) and the job defines that the deadline has expired, the Failed opportunity stage changes to *Closed Rejected*. Stages of other opportunities remain as *New*.

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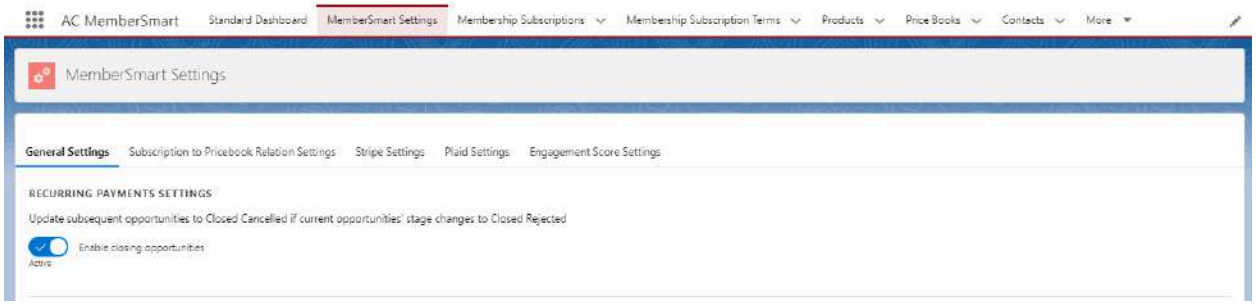
If the Recurring payments setting is enabled in MemberSmart Settings, the next opportunities stages will be changed to *Cancelled*.



Flows

We provide custom flows in our package.

- Member Registration

We provide the default flow that evokes member registration processes by clicking the “Become a Member” button on the Member Registration component.

See how to set it up here.

- Subscription Renew

We provide the default flow that evokes the membership renewal process by clicking the “Renew” button on the Member Registration, Membership Management, Membership Details components.

See how to set it up here.

- Subscription Term Interval Generator

The flow allows you to set up the entire logic of generating an opportunity for a specific subterm.

- Subscription Term Recurring Opportunities Generator

The flow controls membership length and interval settings. For example, in this flow, we define that a one-year membership length contains 12 months interval.

- Finalise Payment

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The flow allows to finalise the subscription payment process.

See how to set it up here.

Note We advise cloning the default flow to create your own if you need to make any changes to our default functionality.

Scheduled Jobs

We provide the following scheduled jobs in our package:

- *MbrSmart.ExpiredInstalmentScheduler job*
  Check for expired payment deadlines on failed Instalments and automatically transition them to Closed Rejected stage
- *MbrSmart.RenewalScheduler job*
  Enable automatic renewal for membership subscriptions with auto-renewal
- *MbrSmart.MembershipRenewalEmailScheduler job*
  Enable sending renewal email notifications every day, 7 days before the membership expires
- *MbrSmart.LogCleanUpBatch job*
  Enable automatic deletion of error logs from the past 180 days
- *MbrSmart.InvoiceInstalmentScheduler job*
  For invoice payments, automate instalment status changes and initiate invoice emails upon reaching the payment due date
- *MbrSmart.ProcessingPaymentsHandlerScheduler job*
  Enable status changes for ACH and BACS transactions
- *MbrSmart.RecurringPaymentsScheduler job*
  Enable recurring payments charging for membership subscriptions
- *MbrSmart.ContactMembershipUpdaterScheduler job*
  Enable daily membership period check and update
- *MbrSmart.ExpiredInstalmentScheduler job*
  Enable checking for expired payment deadlines on failed Instalments and transitioning them to Closed Rejected stage

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- *MbrSmart.TrialMembershipsUpgraderScheduler*
  Automatically converts completed trial terms into paid subscription terms

- *MbrSmart.TrialMembershipsCancellationScheduler*
  Automatically cancels trial subscriptions that expire without successful payment

- *MbrSmart.TrialMembershipsEndingReminderScheduler*
  Sends reminder emails to users 1 day before their trial period ends

- *MbrSmart.ExpectedRenewalAmountUpdaterScheduler*
  This scheduled job automatically recalculates and updates the Expected Renewal Amount field for all active Membership Subscription Terms. It performs the same logic as the “Update Expected Renewal Amount” button in MemberSmart Settings → Membership Management Settings.
  While the scheduler ensures periodic updates (default: every 2 weeks, configurable), we recommend using the manual button for on-demand updates to avoid unnecessary system load.

- *MbrSmart.ReputationPointsScheduler job*
  Enable awarding users reputation points based on configurations in the Reputation Points Settings
  The job enables awarding users reputation points based on configurations in the Reputation Points Settings.
  After you enable the ReputationPointsScheduler job, please make sure to enable the history tracking for the following objects and fields:

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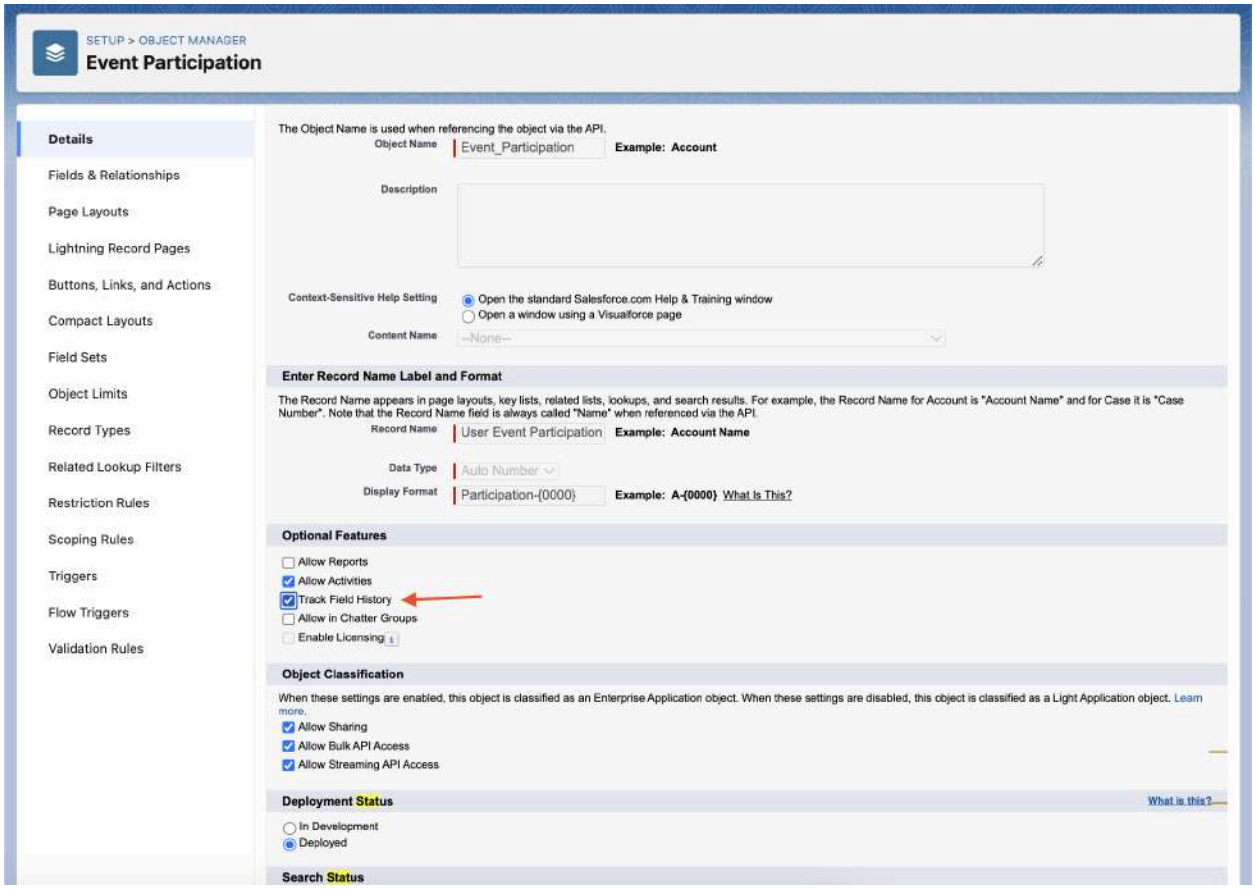
Event Participation object and *Status* or/and *Online Event Attended* fields



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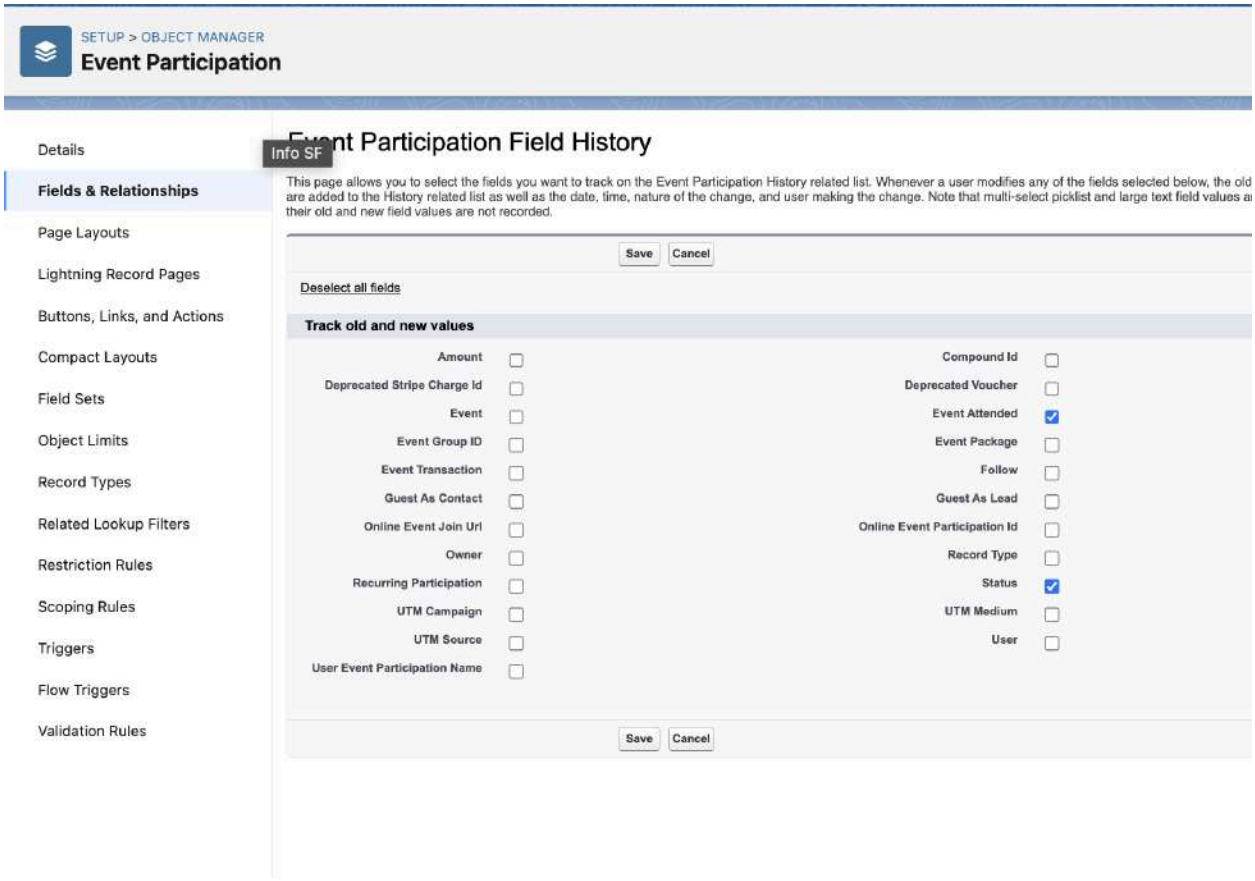

Note The jobs can be enabled or disabled manually from the MemberSmart Settings - Scheduled Jobs Settings.

Important When updating from any version below 1.80 to 1.80, do not forget to disable all scheduled jobs before installing the app, and then after installation, enable jobs in MemberSmart Settings - Scheduled Jobs Settings.

Email Notifications

General Emails

There are email templates that come with the package. The templates can be accessed and updated from the Setup – Classic Email Templates – AC MemberSmart Email Templates folder.

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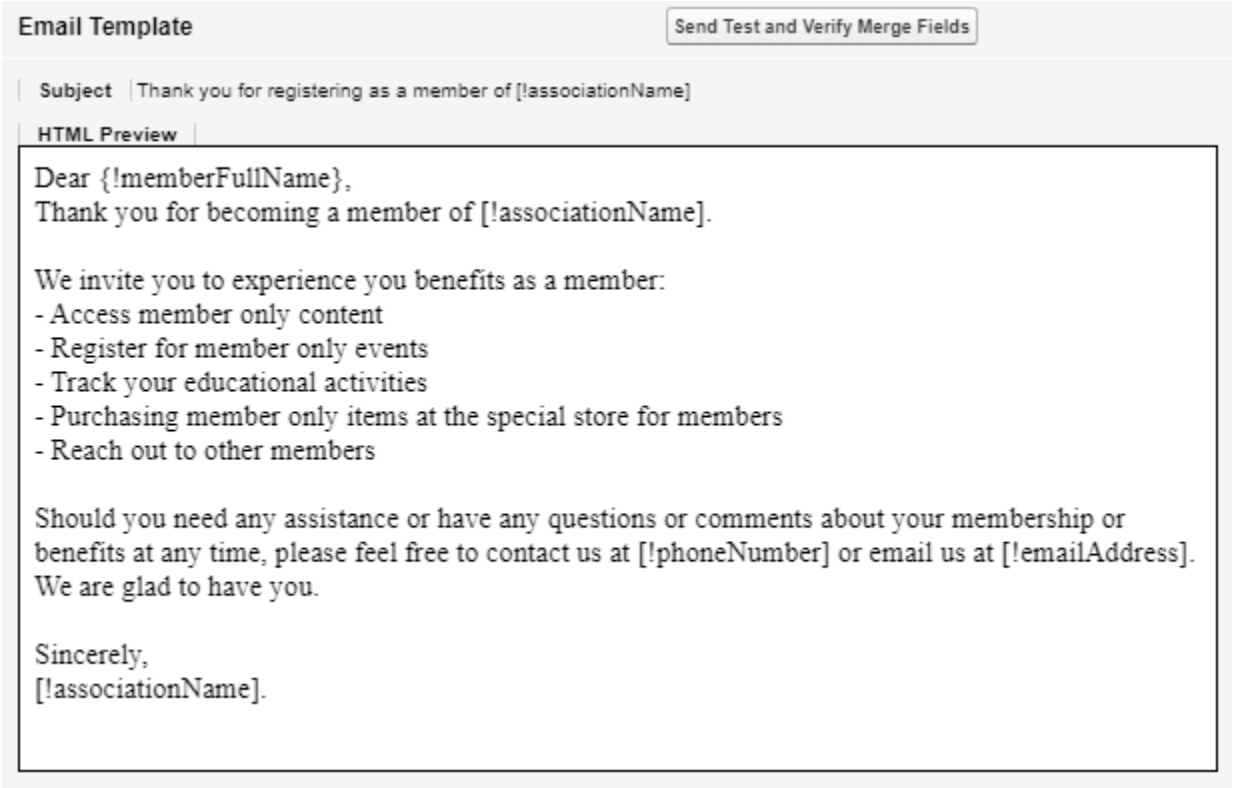
Note If the email template is not activated, the email will not be sent. Once activated, it will be sent as intended.

- **Welcome Email**

  The users receive an email confirmation after registering as members when the “Create users when self-registering with the registration flow on site” setting is enabled.



    - Emails are sent when the following conditions are met:
        - Individual membership:
            - When the Member Status of the user is Active and if the Activation Date field is changed to Today
        - Organisational membership:

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                - Send welcome email to all contacts under their account with Active Member status if they don't have the Returning Member field marked as checked
                - Send welcome email when new contact is added under that account with Active Member status, and if there is no Returning Member field marked as checked
            - Trial subscriptions:
                - Member Status = Active Member
                - Membership Activation Date is populated
        - Values in square brackets should be edited by an admin.
            - [!associationName] - enter the name of your organization
            - [!phoneNumber] - enter the appropriate phone number
            - [!emailAddress] - enter the appropriate email address
- **Membership Request Confirmation**

  The users receive a Membership Request Confirmation email after completing the membership flow when the “Create users when self-registering with the registration flow on site” setting is disabled. This email is only sent if the user is a

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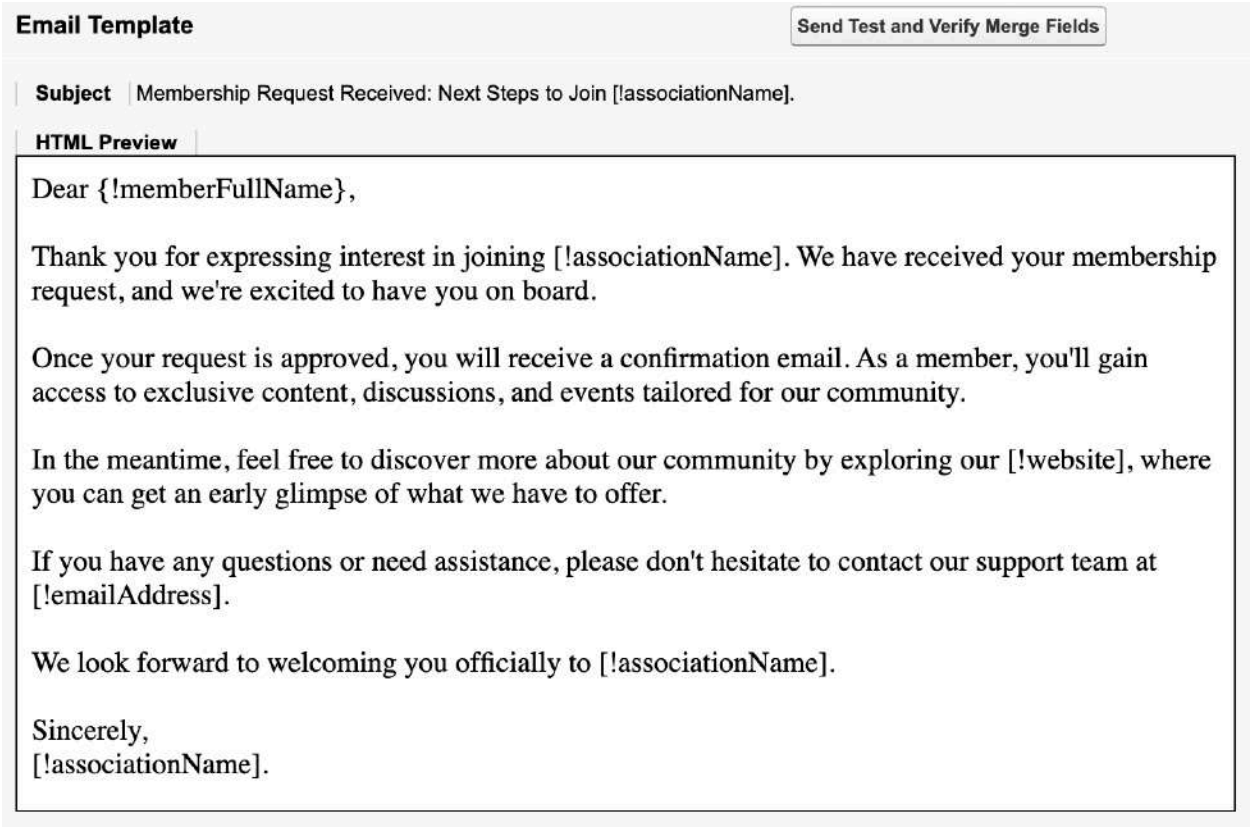
guest (not logged in).



- Emails are sent when the following conditions are met:
  - The member status is set to Non-Member
  - The MembershipDurationDays field is blank or set to 0
  - The subscription is a trial or a paid/free subscription
  - User registration is disabled
  - The user is a guest (not logged in)
  - This logic works regardless of whether Unified Checkout is enabled or disabled
- Values in square brackets should be edited by an admin.
  - [!associationName] - enter the name of your organization

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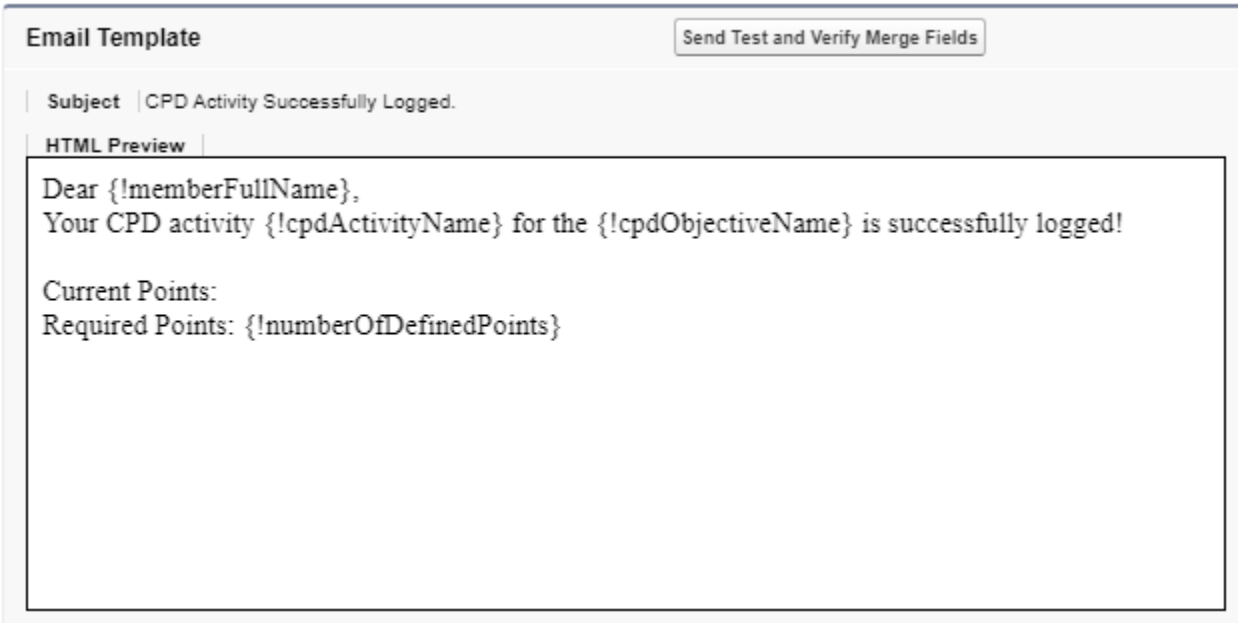
        - [!website] - enter the appropriate phone number
        - [!emailAddress] - enter the appropriate email address

- New CPD Activity Log Email

  After members submit the CPD Log on site, they receive a confirmation email.



    - Emails are sent after CPD Activity is logged and the CPD User Activity record is created.

- **Membership Renewal Email**

  Emails are sent to members as reminders that the membership expires soon.

  Note Please enable the MembershipRenewalEmailScheduler job.

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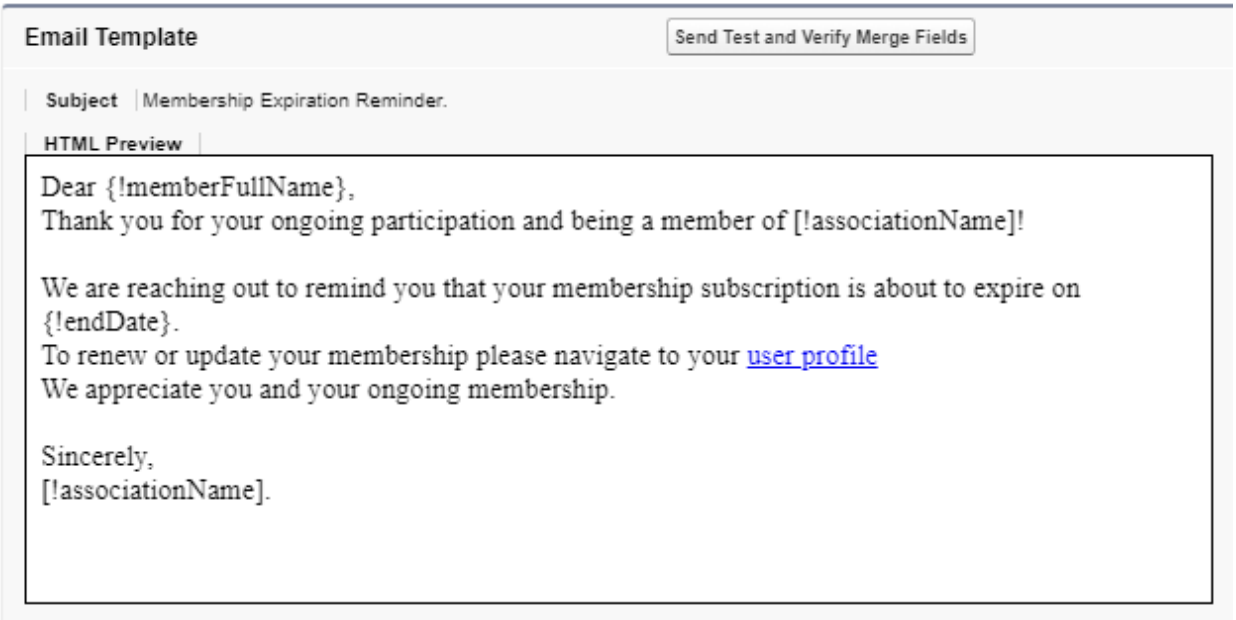

  - Emails are sent 7 days before the membership expires (7 days before the End Date field on the Membership Subscription record).
  - Values in square brackets should be edited by an admin.
    - [!associationName] - enter the name of your organization

- **Payment Failure Notification**

  An automatic email is sent to a member when their payment for membership fails.

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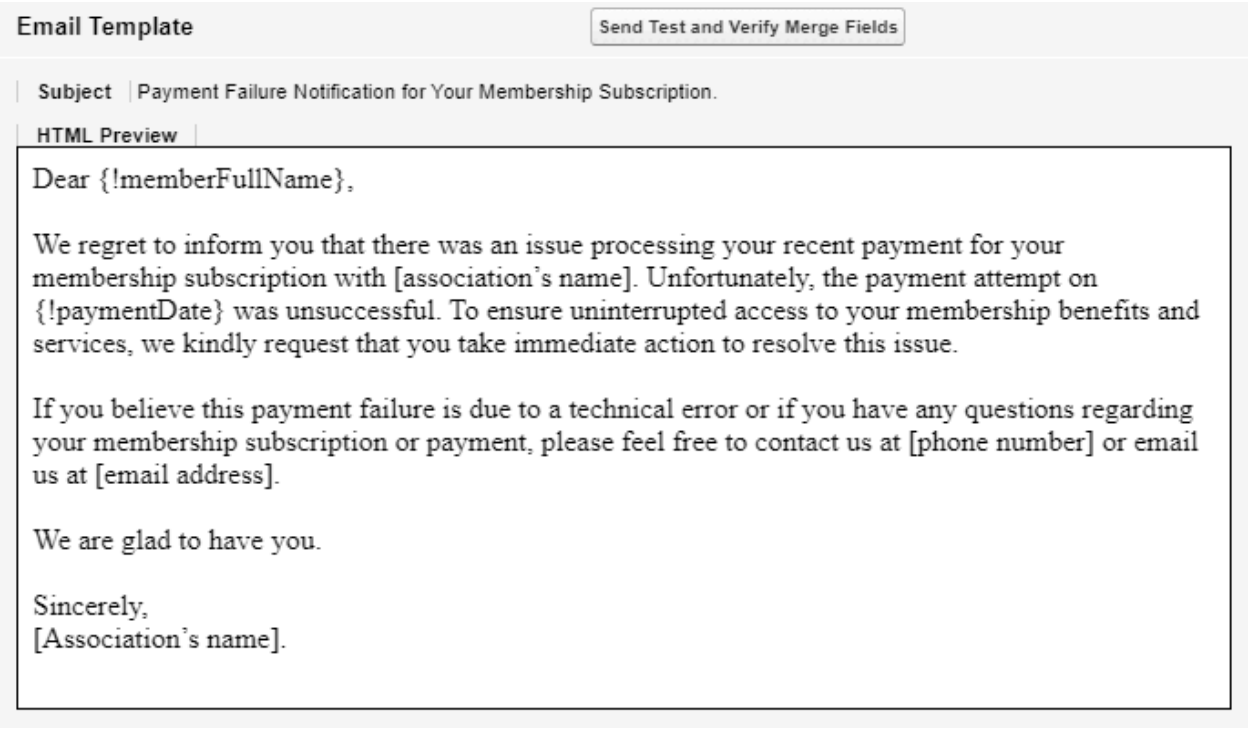

  - Emails are sent when the instalment status changes to failed.
  - The date is converted according to users' time zone.
  - Values in square brackets should be edited by an admin.
    - [!associationName] - enter the name of your organization
    - [!phoneNumber] - enter the appropriate phone number
    - [!emailAddress] - enter the appropriate email address

- **Trial Ending Soon Reminder**

  A reminder email is sent to the user shortly before their trial period ends. This reminder gives users time to decide whether to cancel or prepare for the transition into a paid membership.

  Email template:

  Dear {!Contact.Name},

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We hope you're enjoying your trial of {!Product.Name}! This is a friendly reminder that your trial period will end on {!Subscription.Trial_End_Date__c}.

Thank you for choosing us!

Best regards,

[Your Company Name]

Emails are sent when:

- The TrialMembershipsEndingReminderScheduler job runs daily at 08:00 AM
- The end date of the trial is tomorrow
- Values in square brackets should be edited by an admin

- **Trial Period Completed**

  Users receive a confirmation email when their trial period ends and their membership is successfully converted to a paid subscription.

  Email template:

  Dear {!Contact.Name},

  [Your Company Name] is pleased to inform you that you have completed your trial period and we have transitioned you to your new status as a full member.

  If you have any questions or need further assistance, please contact us here [email]

  Emails are sent when:

  - The status of the Trial Membership Subscription Term is updated to Completed.
  - A new paid term is created and the first Instalment is successfully collected.
  - Values in square brackets should be edited by an admin

- **Trial Subscription Canceled (Failed Conversion)**

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Users receive an email notification if their trial subscription ends but cannot be converted into a paid subscription (for example, due to failed payment or other issues).

Email template:

Subject: Your trial subscription has ended

Body:

Hello {member's full name},

We wanted to let you know that your trial subscription has ended and could not be converted into a full subscription.

As a result, your subscription has been canceled and you no longer have access to the associated member benefits.

If you'd still like to continue, you can purchase a new subscription at any time.

If you believe this was a mistake or need help, please contact our support team.

Best regards,

[association's name]

Emails are sent when:

- A Trial Membership Subscription Term reaches its end date.
- The system attempts conversion to a paid subscription but fails (for example, due to unsuccessful payment).
- The trial subscription status is updated to Canceled.
- Values in square brackets should be customized by an admin.

Invoices and Receipts

Important If AC Unified Checkout integration is enabled in the settings, it is important to deactivate the native Membership Request, Invoice, and Receipt email templates to prevent duplicate notifications being sent alongside the AC Checkout app's email notifications.

Invoices

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Members receive invoices by email when choosing the invoice payment method while subscribing to a membership.

Invoice Template:

World Medical Association

INVOICE

3th St, New York, NY 10011, USA

wma@association.com

New York Bank

INVOICE # a0v8d000000mnfm

DATE 13/06/2023

TO:

Name Last

YOUR COMMENTS OR SPECIAL INSTRUCTIONS

Please, modify instruction for payment E.g. For faster payment processing, please indicate the invoice number **a0v8d000000mnfm** in the purpose of payment.

Subscription	Amount
ST-400	USD 187.38
TOTAL AMOUNT	USD 187.38

All prices are in USD

Make all checks payable to World Medical Association

If you have any questions concerning this invoice, contact John White, (575) 376-2281, johnwhite@wma.com

Template name: *Invoice*

Subject: *Your invoice has arrived*

Body:

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=Company Name=

INVOICE

=Company address=

=Company Email=

Invoice No: {!Id}

=Company Phone=

Invoice Date: {!CreatedDate}

=Bank Statements=

TO:

{!MbrSmart__Contact__c}

YOUR COMMENTS OR SPECIAL INSTRUCTIONS

Please, modify instruction for payment E.g. For faster payment processing, please indicate the invoice number **{!Id}** in the purpose of payment.

Subscription	Amount
{!MbrSmart__Subscription_Term__c}	{!MbrSmart__TotalAmount__c}
TOTAL AMOUNT	{!MbrSmart__TotalAmount__c}

All prices are in {!MbrSmart__CurrencyISO__c}

Make all checks payable to =Company Name=

THANK YOU!

Fields:

- =Company Name= – enter your company name
- =Company address= – enter your company address
- =Company Email= – enter your company email address
- =Company Phone= enter your company phone number
- =Bank Statements= enter your bank statements
- Invoice Number – autogenerated
- Invoice Date – the date of issue of the invoice
    - The date is converted according to users' time zone

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- Bill To – name and billing info of the contact, take from Account: Street, City, State, Postal code, Country

Table content:

- Subscription
- Amount
- Total Amount

Receipts

Members receive payment confirmations so that they know the payment is collected and the subscription has started.

Receipt Template:

International Gas Union

RECEIPT

3th St, Vevey, 10011, Switzerland

igu@association.com

(505) 266-8388

Switzerland Bank

Receipt Number: a0w8d0000002gpUAAQ

Receipt Date: 2023-02-16 17:18:51

TO:

0038d00000QrrGLAAZ

YOUR COMMENTS OR SPECIAL INSTRUCTIONS

We confirm the receiving of payment **a0w8d0000002gpUAAQ** you made.

Subscription	Amount
a0x8d000001hrlCAAQ	187.38
TOTAL AMOUNT	187.38

All prices are in GBP

If you have any question concerning this receipts, contact Steve Drew, mob: +380674567898, email: steve@association.com

THANK YOU!

Template name: *Receipt*

Subject: *Your receipt has arrived*

Body:

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=Company Name=

RECEIPT

=Company address=

=Company Email=

Receipt Number: {!Id}

=Company Phone=

Receipt Date: {!CreatedDate}

=Bank Statements=

TO:

{!MbrSmart__Contact__c}

YOUR COMMENTS OR SPECIAL INSTRUCTIONS

We confirm the receiving of payment **{!Id}** you made.

Subscription	Amount
{!MbrSmart__Subscription_Term__c}	{!MbrSmart__TotalAmount__c}
TOTAL AMOUNT	{!MbrSmart__TotalAmount__c}

All prices are in {!MbrSmart__CurrencyISO__c}

If you have any question concerning this receipts, contact =Name= =Phone= =Email=

Fields:

- =Company Name= – enter your company name
- =Company address= – enter your company address
- =Company Email= – enter your company email address
- =Company Phone= – enter your company phone number
- =Bank Statements= – enter your bank statements
- Receipt Number – autogenerated
- Receipt Date – the date of issue of the invoice
    - The date is converted according to users' time zone

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- Bill To – name and billing info of the contact, taken from Account: Street, City, State, Postal code, Country

Table content:

- Subscription
- Amount
- Total Amount

Fields:

- =Name= – enter primary contact's name
- =Phone= – enter primary contact's phone number
- =Email= – enter primary contact's email address

Email Template Field Linking

To provide more flexibility and customization options in email communications, the system supports linking additional fields from related objects (including via lookup relationships) in email templates.

Admins can insert values from related objects up to five levels deep, using SOQL-style lookup path syntax.

Each system email template is associated with a specific base object. Only fields from that object and its related lookups can be referenced in the template:

Email Template	**Associated Object**
Welcome Email	Contact
Membership Request Confirmation Email	Contact
New CPD Activity Log Email	CPD User Activity
Membership Renewal Email	Membership Subscription
Payment Failure Notification	Instalment
Invoice	Instalment

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Receipt	Instalment

Merge fields follow this format: {!Object.Field}

You can reference related objects using dot notation, similar to SOQL: {!Contact.Account.Name}

This example pulls the Account Name from the Account related to the Contact record.

Notes:

- A maximum of five lookup levels is supported per merge field.
- Only fields from the template's associated object and its lookups are supported.
- Ensure all referenced fields are accessible and populated at the time the email is sent.

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Internal Administration & Setup

This section covers how to configure and administer internal features of the product after installation. It explains how to set up subscription types, flows, and other functionality, so you can tailor the system to your organization's exact needs.

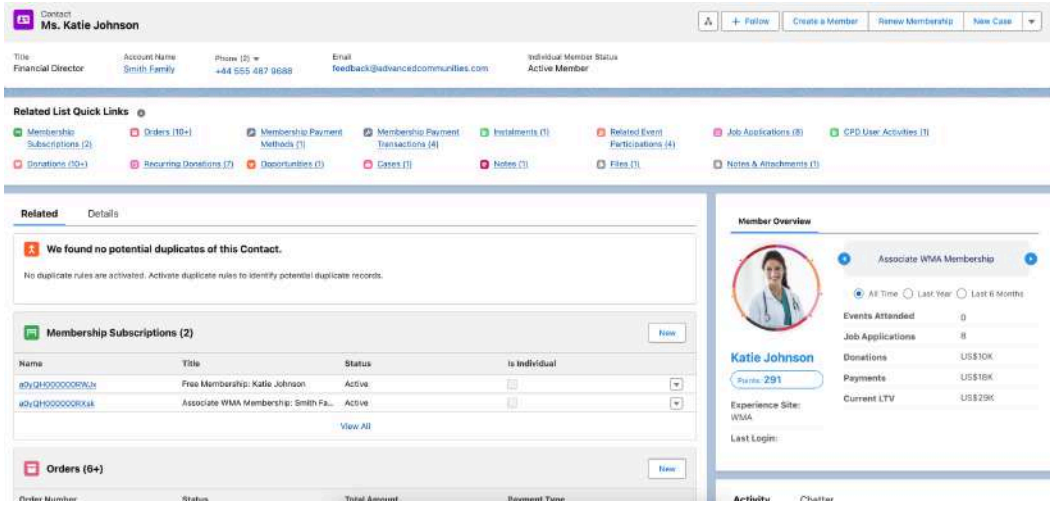
Member Card Component

The Member Card component provides a consolidated view of a member's or organization's activity across the platform. It enables membership managers and administrators to quickly review key performance indicators and engagement metrics.

The component can be placed on either the Contact record page or the Account record page. Behavior and displayed data adapt automatically depending on context.

Key performance indicators:

- Events Attended
- Job Applications
- Orders
- Donations
- Payments
- Lifetime Value (LTV)
- Active Subscriptions
- Engagement Score (Points)
- Last Login and Site Activity (Contact level only)



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Contact-Level Behavior

When the component is placed on a Contact record page, it displays:

- Contact's profile avatar and name
- Engagement Score (Points) for the individual
- Experience Site name
- Last Login and site activity
- Active subscriptions linked to the Contact (scrollable)
- Key metrics filtered by time range (All Time / Last Year / Last 6 Months)

Account-Level Behavior

When the component is placed on an Account record page, it displays aggregated data across all related Contacts.

Aggregated Metrics

The following values are summed for all Contacts associated with the Account:

- Events Attended
- Job Applications
- Orders
- Donations
- Payments
- Lifetime Value (LTV)
- Engagement Score (Points)

Display Adjustments

- Avatar is replaced with a group icon.
- Contact name is replaced with the **Account Name**.
- Component title is **Membership Engagement Overview** (used for both Contact and Account views).
- The **Last Login** field is hidden, as it is contact-specific.
- Only active subscriptions associated with the Account are displayed.
- Time range filters (All Time / Last Year / Last 6 Months) continue to function based on record timestamps.

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- If the total Engagement Score value exceeds the available space, it wraps to a second line.

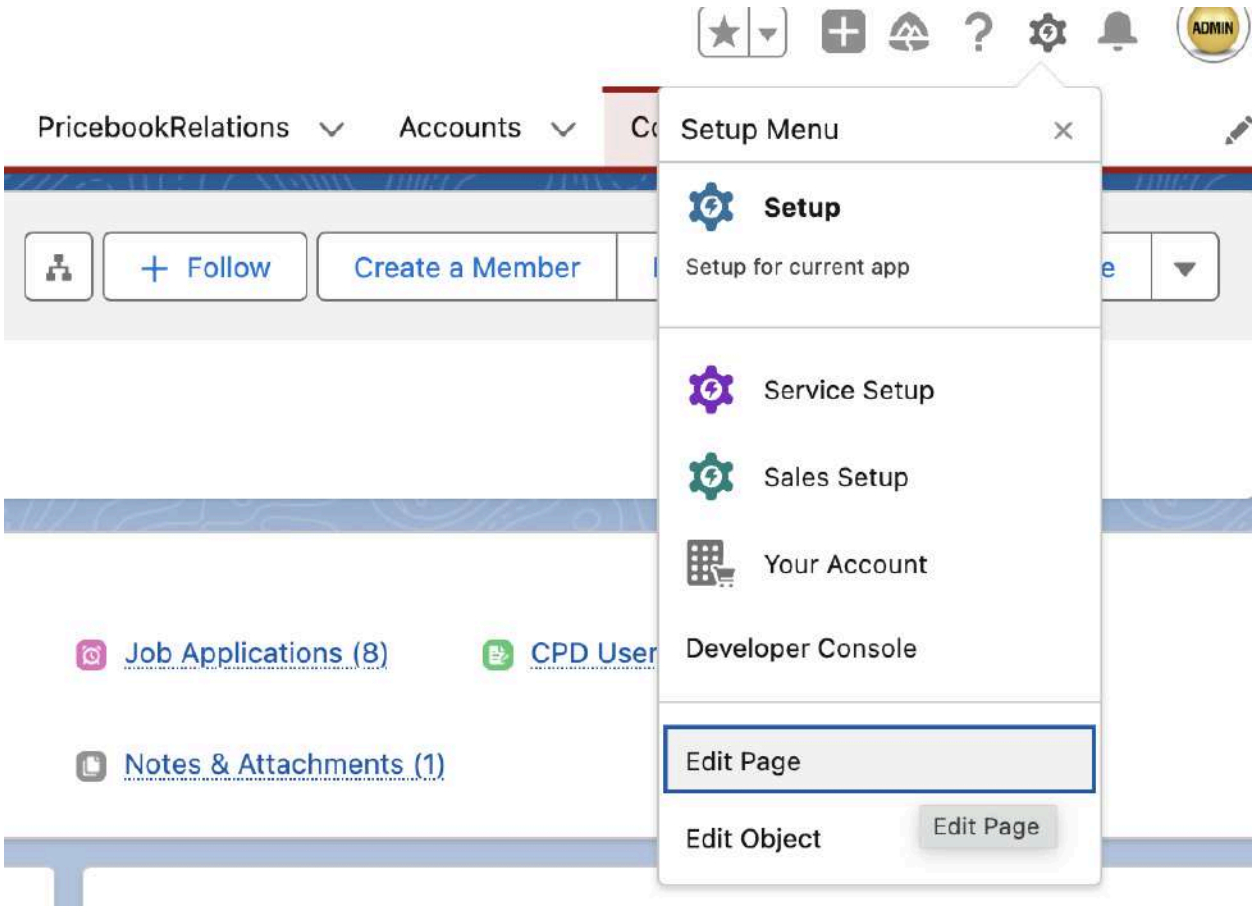
Empty State Behavior

If the Account has no related Contacts or no Contacts with engagement data, the component still renders with all metrics = 0.

Component Placement

The component is designed to be placed on a Contact or Account record page via **Salesforce Lightning App Builder**:

1. On the Contact or Account record page, click **Setup** → **Edit Page**.
2. Add the **Member Card** component to the page.



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Component property:

Community name – picklist field, default value – blank.

Select a community to filter and display Reputation Points for that site.

Data Sources and Dependencies

- The component displays or hides data columns depending on whether related packages are installed.
- Financial data (Orders, Donations, Payments, LTV) is retrieved from the **AC Unified Checkout** package.

Reputation points from the selected site will be updated on the component once a day. The job runs daily, capturing records created or updated on the current day. It does not pull information from previous days. Please run the ReputationPointsScheduler job in MemberSmart Settings - Engagement Score Settings to enable awarding users reputation points based on configurations in the Engagement Score Settings.

Please make sure to **enable the history tracking** for the Payment Transaction and Event Participation objects and fields as described here.

Contact Record Related List

Display more details on the user's activities on the Contact record - Related tab.

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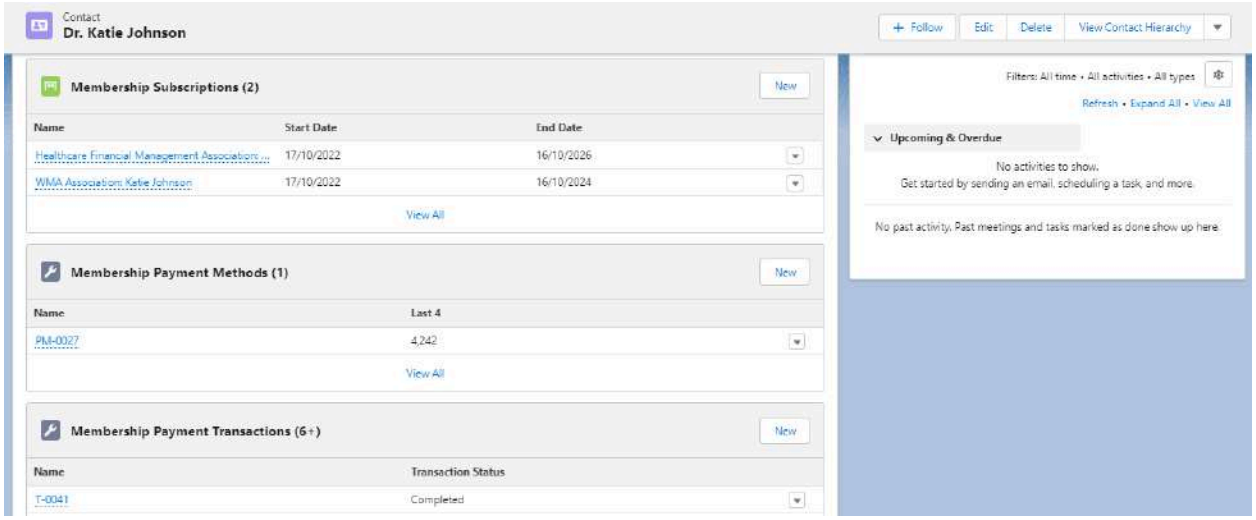

Go to Setup - Object Manager - Contact - Page Layout - Related Lists and add the following components:

- Membership Subscriptions
- Membership Payment Transactions (native)
- Membership Payment Methods (native)
- Instalments
- Event Participations
- Orders
- Job Applications
- CPD User Activities
- Donations
- Recurring Donations

Dashboards

This feature allows managers to monitor key performance indicators related to membership and app usage. Dashboards are fully flexible – components can be placed anywhere on the page to suit your layout needs.

Note Dashboards are available only within the Salesforce environment and cannot be displayed on the external site.

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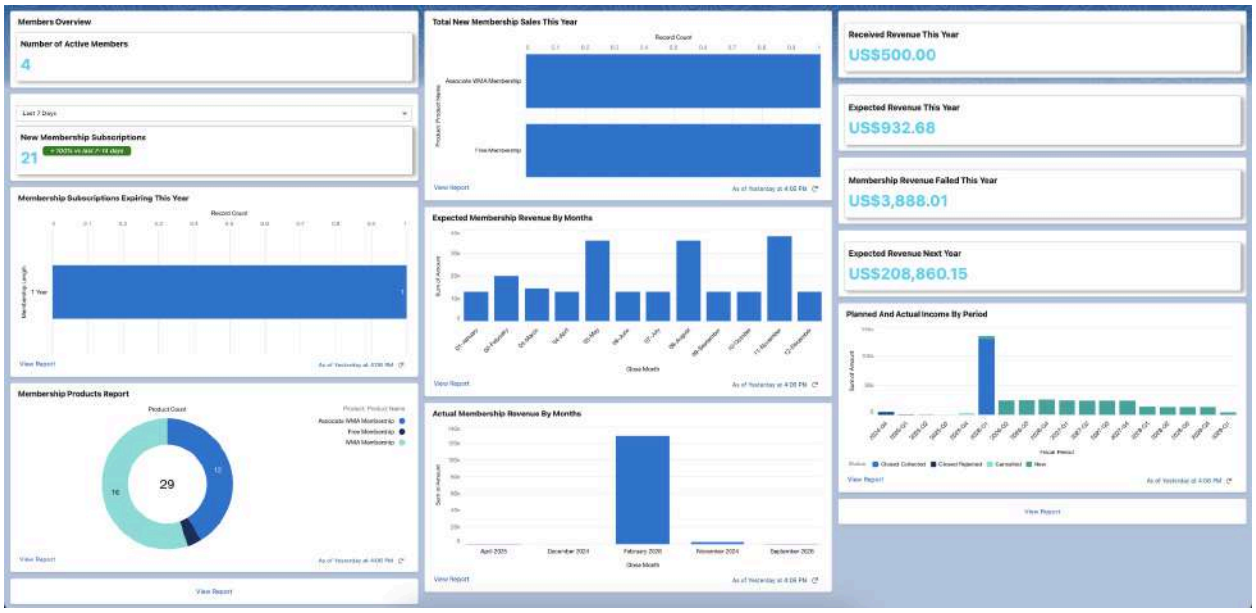
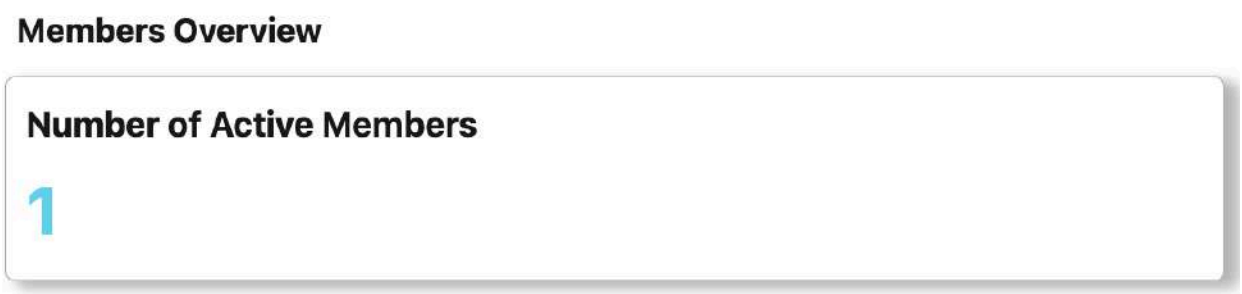
Dashboards use report components included in the package by default. However, you can create and add your own custom reports as needed to tailor the data visualizations to your organization's requirements.



The dashboard's components:

- Number of Active Members



The custom component is used for displaying the actual number of active members.

The component has a number of properties:

  - *Report Name* – required field. Choose a report name.
  - *Title Card* – text field. Defines a title of the card.
  - *Title* – text field. Defines a title of the component.
  - *Hide Picklist* – checkbox field. Enable the checkbox to hide picklist values.

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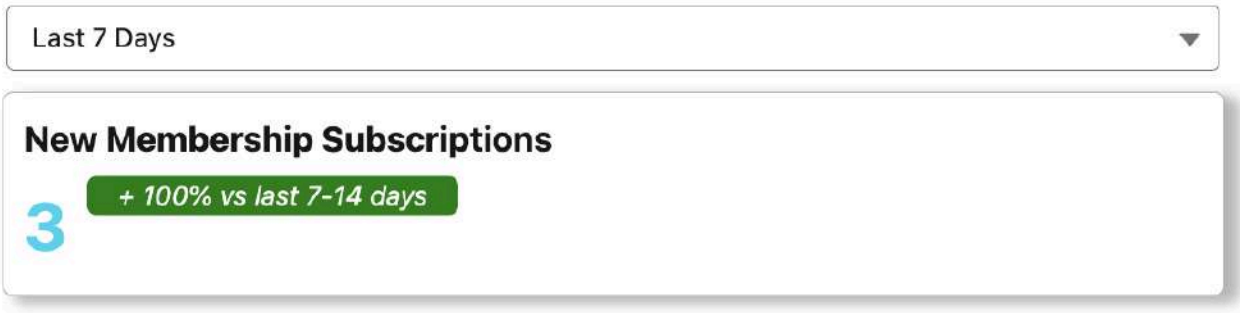
- *Point Color*. Change the color of the displayed value.

- New Membership Subscriptions

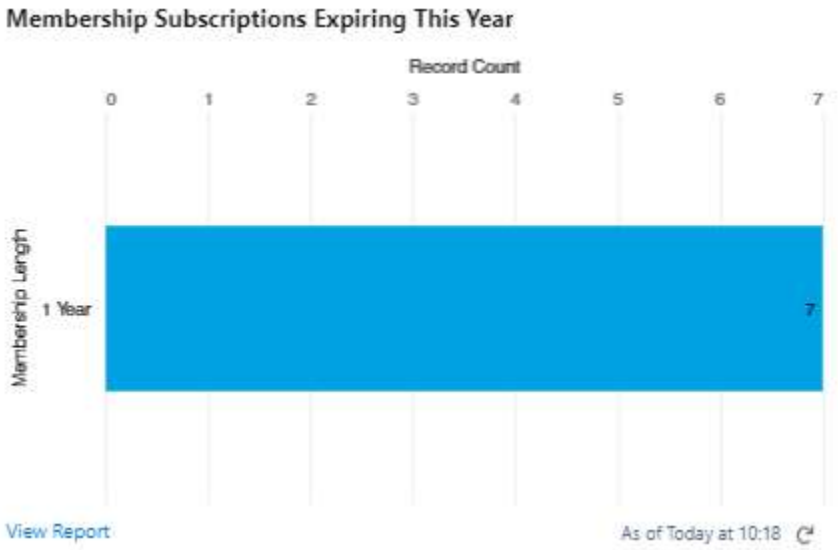


The custom component is used for displaying the number of new members for the last 7/14/30/90/year and the dynamics – the number of members decreased or increased compared to the previous period.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Title Card* – text field. Defines a title of the card.
- *Title* – text field. Defines a title of the component.
- *Hide Picklist* – checkbox field. Enable the checkbox to hide picklist values.
- *Point Color*. Change the color of the displayed value.

- Membership Subscriptions Expiring This Year



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The component displays membership subscriptions expiring this year.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Label* – text field. Defines a title of the component.
- *Filter By*
- *Show Refresh Button* – checkbox field. Enable the checkbox to display a refresh button.

- Membership Products

The component is used for displaying the number of existing membership subscriptions.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Label* – text field. Defines a title of the component.
- *Filter By.*

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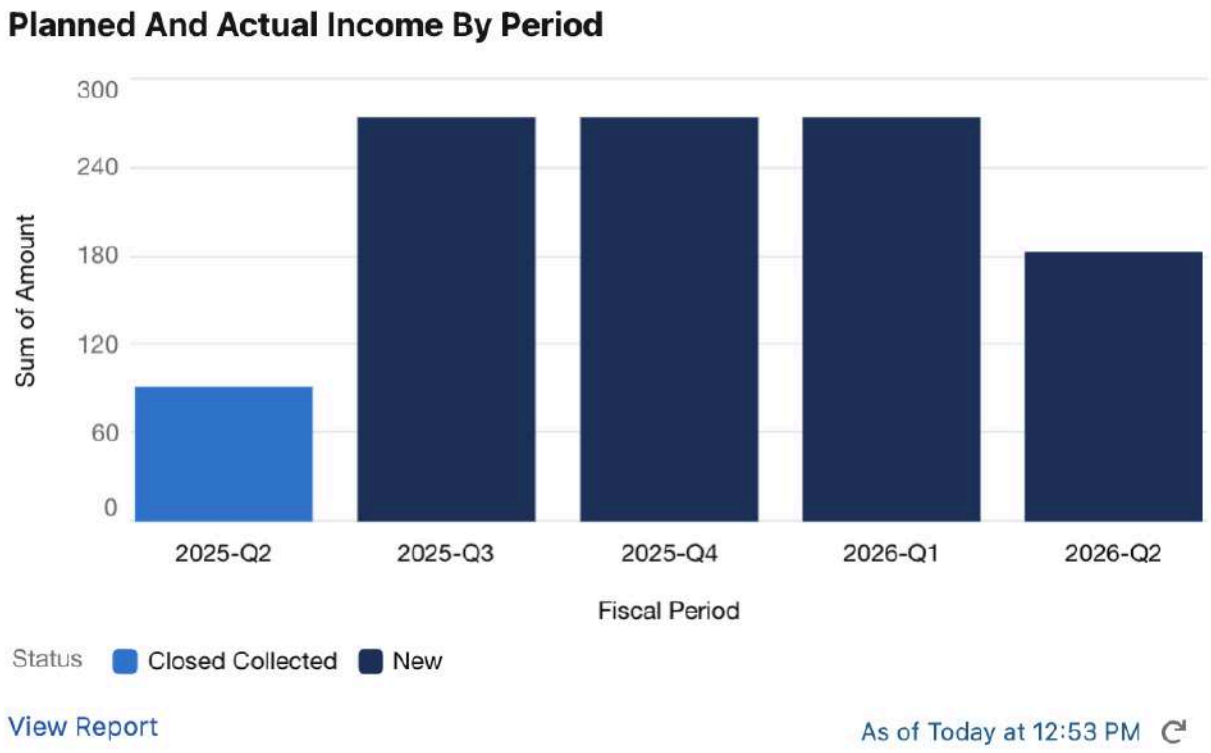
- *Show Refresh Button* – checkbox field. Enable the checkbox to display a refresh button.

- Planned And Actual Income By Period



The component displays planned and actual income by quarters for all time.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Label* – text field. Defines a title of the component.
- *Filter By*
- *Show Refresh Button* – checkbox field. Enable the checkbox to display a refresh button.

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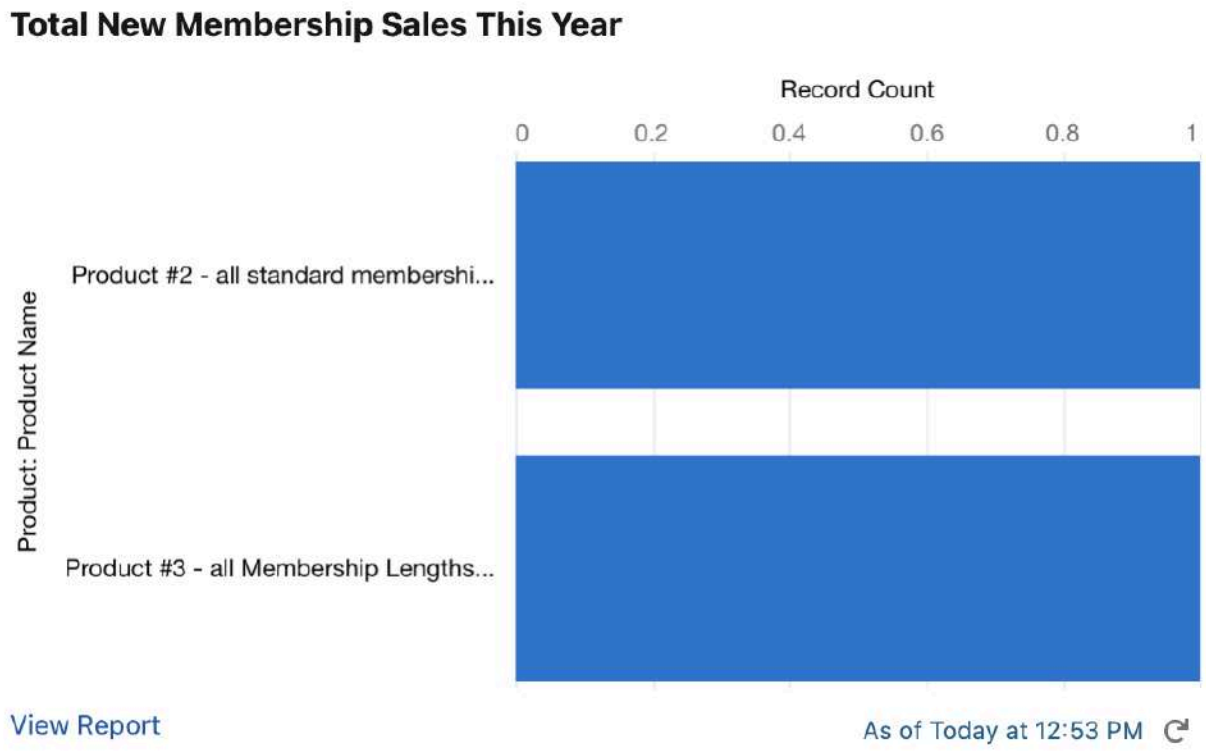
- Total New Membership Sales This Year

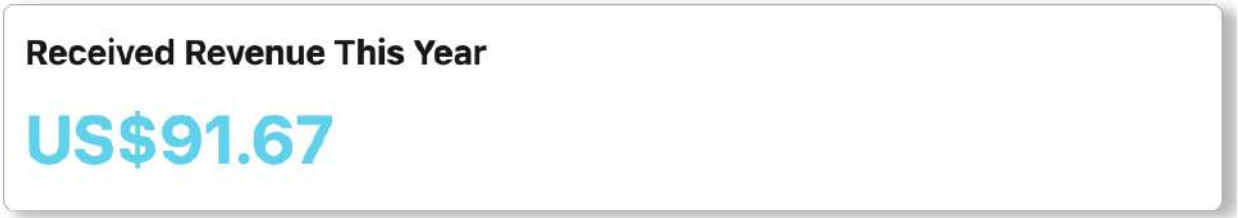


The component displays membership subscriptions purchased this year.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Label* – text field. Defines a title of the component.
- *Filter By*
- *Show Refresh Button* – checkbox field. Enable the checkbox to display a refresh button.

- Received Revenue This Year



The custom component displays received revenue for a current year.

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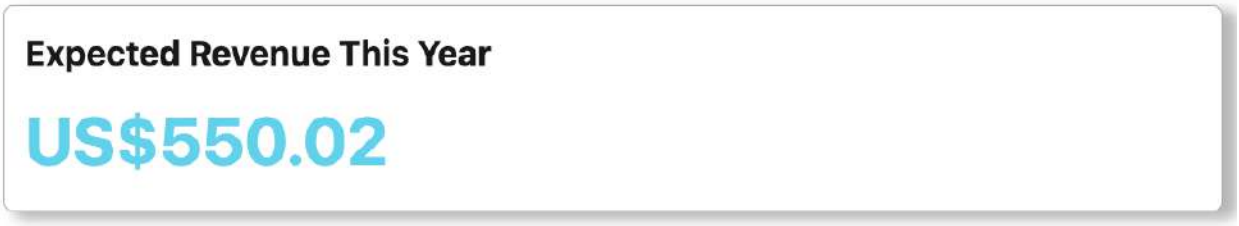
The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Title Card* – text field. Defines a title of the card.
- *Title* – text field. Defines a title of the component.
- *Hide Picklist* – checkbox field. Enable the checkbox to hide picklist values.
- *Point Color*. Change the color of the displayed value.

- Expected Revenue This Year



The custom component displays expected revenue for a current year.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Title Card* – text field. Defines a title of the card.
- *Title* – text field. Defines a title of the component.
- *Hide Picklist* – checkbox field. Enable the checkbox to hide picklist values.
- *Point Color*. Change the color of the displayed value.

- Expected Revenue Next Year

The custom component displays expected revenue for the next year.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.

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- *Title Card* – text field. Defines a title of the card.
- *Title* – text field. Defines a title of the component.
- *Hide Picklist* – checkbox field. Enable the checkbox to hide picklist values.
- *Point Color*. Change the color of the displayed value.

- Membership Revenue Failed This Year

The custom component displays failed revenue for a current year.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Title Card* – text field. Defines a title of the card.
- *Title* – text field. Defines a title of the component.
- *Hide Picklist* – checkbox field. Enable the checkbox to hide picklist values.
- *Point Color*. Change the color of the displayed value.

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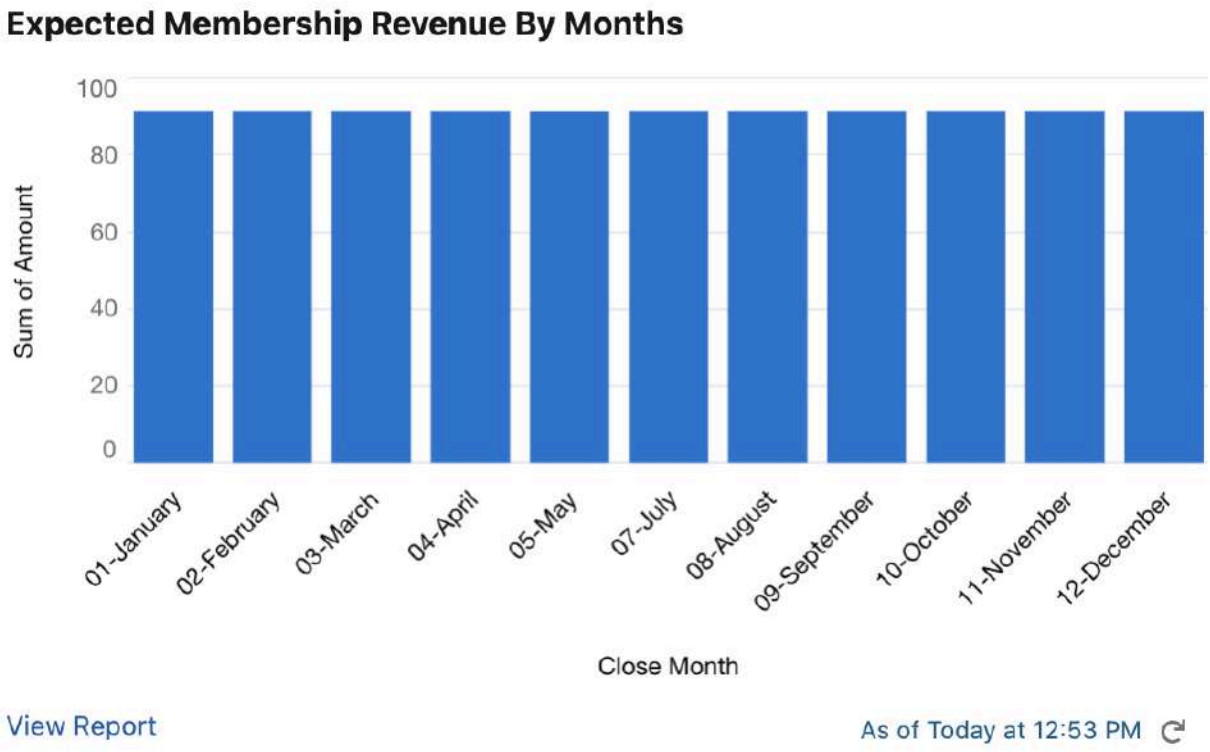
- Expected Membership Revenue By Months



The component displays expected income by months for all time.

The component has a number of properties:

- *Report Name* – required field. Choose a report name.
- *Label* – text field. Defines a title of the component.
- *Filter By*
- *Show Refresh Button* – checkbox field. Enable the checkbox to display a refresh button.

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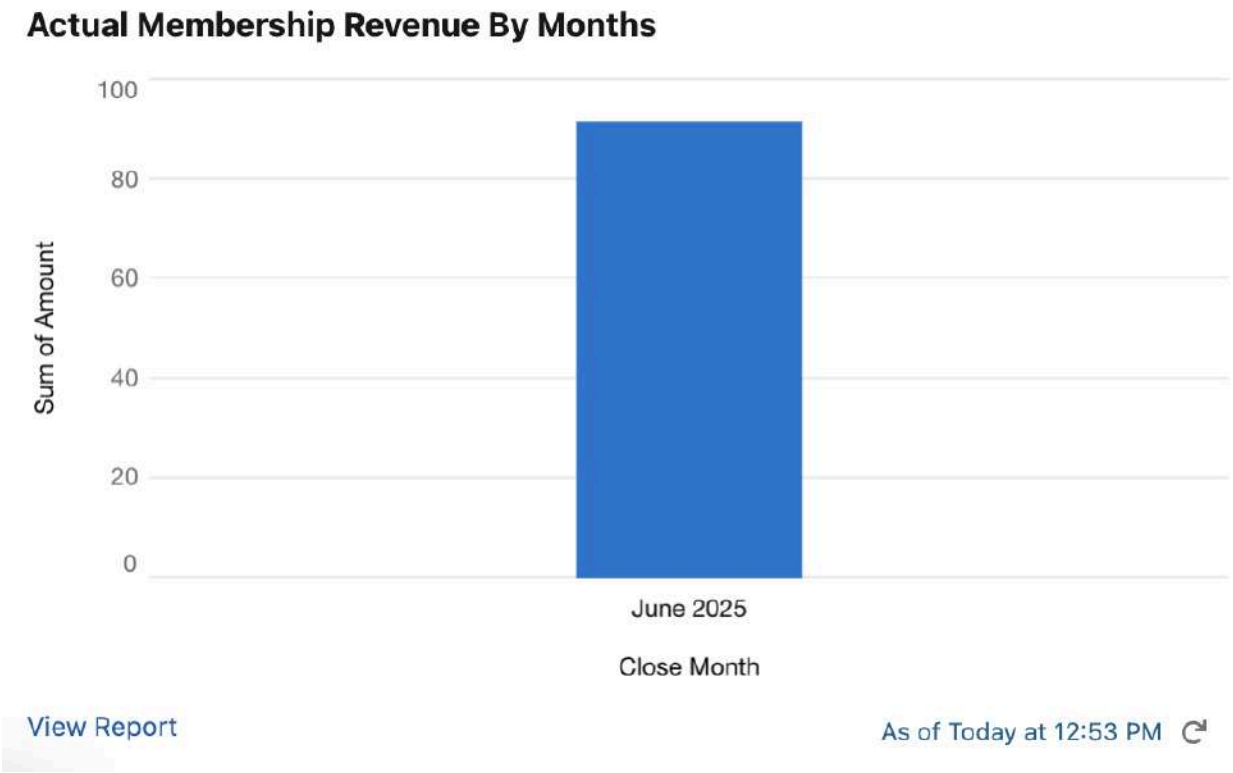
- Actual Membership Revenue By Months



The component displays actual membership revenue by month for all time.

The component has a number of properties:

  - *Report Name* – required field. Choose a report name.
  - *Label* – text field. Defines a title of the component.
  - *Filter By*
  - *Show Refresh Button* – checkbox field. Enable the checkbox to display a refresh button.

- Link Button

The component can be used to display button links.

The component has the following properties:

  - *Link Title* – text field. Type in a link title.

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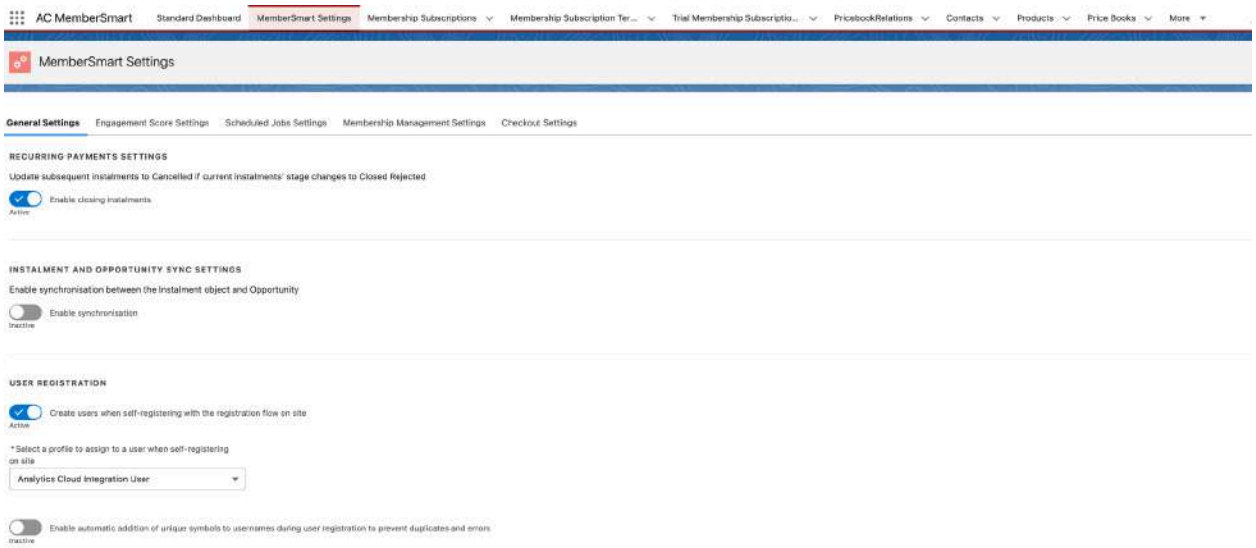
- *Link Page* – text field. Copy and paste the link to the page where the link should redirect you when clicked.
- *Text Align* – picklist field.

MemberSmart Settings

The Settings tab allows you to configure the app settings.

General Settings



The tab displays:

- *Recurring payments settings*

  There is a scheduled job for checking if the next instalment is paid. Instalments' status changes to Canceled if one of the previous instalment's status changes to Closed Rejected.
  If you use opportunities: opportunities' status changes to Canceled if one of the previous opportunities' stage changes to Closed Rejected. Opportunities are associated to instalments and are created if the synchronisation between the Instalment object and Opportunity is enabled in settings.

  Slide to enable/disable closing instalments for recurring payments.

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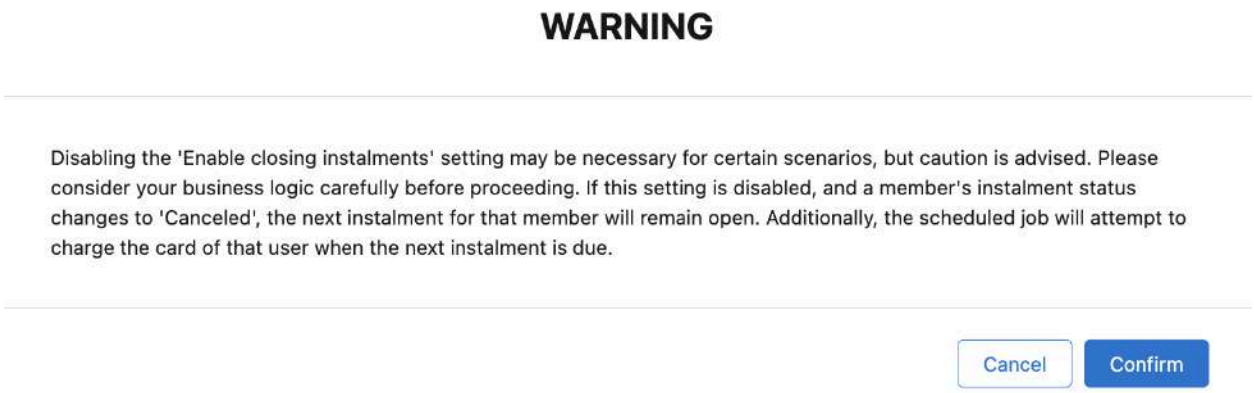
The setting is enabled by default. When trying to disable, the warning is displayed:



- *Instalment and opportunity sync settings*

  When the setting is turned on, opportunities are created along with instalments. Learn more here. If you enable the settings, please configure the opportunity stages. The setting is disabled by default.

- *User registration*

  - *Create users when self-registering with the registration flow on site.* Enable the setting to allow creating internal users when members self-register with the registration flow on site.
    Note If the setting is disabled, you will need to enable your contacts as community users manually with standard Salesforce functionality.
    The setting is disabled by default.

    - To ensure the Member Registration Flow functions correctly, it is necessary to enable the *Allow External User Self-Registration* setting in Salesforce from Setup – Digital Experiences – All Sites – Administration – Login & Registration.

  - *Select a profile to assign to a user when self-registering on site.* Select a profile from a picklist to assign to a user when self-registering on site as a member. The setting is blank by default.

  - *Enable automatic addition of unique symbols to usernames during user registration to prevent duplicates and errors.* This toggle, disabled by

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default, is designed to prevent errors during user registration by automatically adding unique symbols to usernames (specify the preferred symbols in the setting below).

- *Specify preferred symbols to be added before the '@' symbol in usernames.* Customize the symbols added to usernames. The setting, limited to 5 characters, allows admins to input the preferred symbols. Please input the characters in uppercase.
  - To illustrate, if a user registers with the email address "advancedcommunities@gmail.com" and the specified symbols are "-mbrs," the generated username will be "advancedcommunities-mbrs."

- *Notifications*

  Define the Organization-wide Email Address from which all the notifications will be sent. The default value is empty, displaying both verified and unverified emails.

- *Guest users settings*
  - *Allow displaying the file uploader to guest users during member registration.* The toggle setting allows displaying the file uploader to guest users during member registration on site.
  - *Define fieldset API name on the Account object to manage the creation or update of Account records for Guests.* For enhanced security, during member registration under the guest user from the Experience Cloud site, records can be created only if the fields in the incoming record correspond to the fields in the Account object's field-set *Guest_Member_Default_Fieldset* (default). The fieldset can be updated according to the organizations' needs.
  - *Define fieldset API name on the Contact object to manage the creation or update of Contact records for Guests.* For enhanced security, during member registration under the guest user from the Experience Cloud site, records can be created only if the fields in the incoming record correspond to the fields in the Contact object's field-set

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Guest_Member_Default_Fieldset (default). The fieldset can be updated according to the organizations' needs.

- *Pricing Settings*
    - Use dynamic pricing rules to determine pricebook and pricing logic
    - Slide to enable/disable advanced pricing. The setting is disabled by default.
- *Flow settings*
    - Define API name for product entries generator flow.
- *Grace and Payment Periods Flexibility Settings*
    - *Disable validations that enforce grace and payment period limits based on payment frequency*
        - If needed, disable validations where the grace and payment period cannot be greater than the payment frequency.
        - All the frequencies will be visible on the Membership Plan component; in case when membership subscription will fall into the Suspended status, there will be the ability to provide payment for it.
    - *Enable payment for initial instalments within the longer of grace or payment periods*
- *Immediate Payment for Membership Renewals*
    - When enabled, this setting changes the default behavior of renewals. Instead of automatically extending the subscription period, the user is prompted to pay immediately to confirm their renewal. This ensures the renewal does not go through unless payment is successfully completed. This is applicable to both manual and automatic renewals initiated by the user or by scheduled jobs. Learn more.

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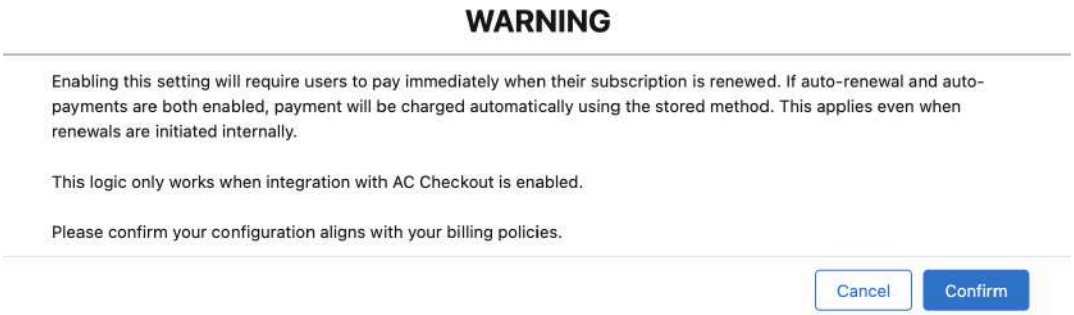
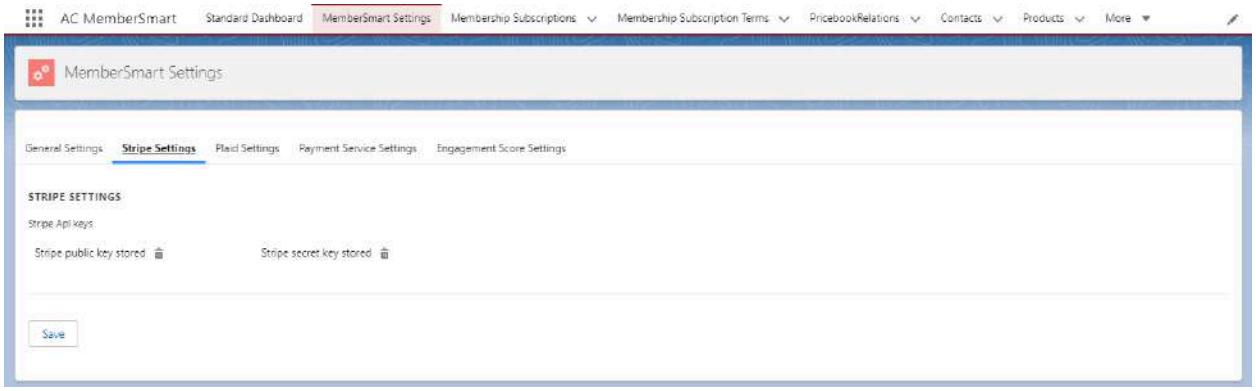
- The setting is disabled by default. When trying to enable, the warning is displayed:



Stripe Settings

Add Stripe API keys.



If the AC Unified Checkout component is installed and the “Enable AC Unified Checkout Integration" toggle is enabled in the Checkout Settings tab, the “Stripe Settings” and “Plaid Settings” tabs are hidden.

Plaid Settings

Add Plaid API keys, Client ID, and select Plaid Mode.

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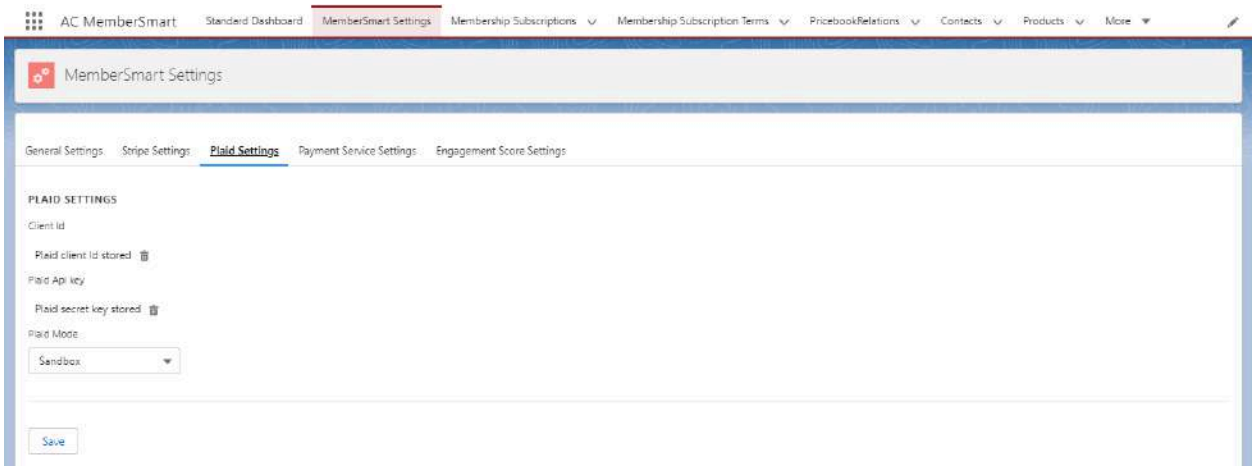

If the AC Unified Checkout component is installed and the Enable AC Unified Checkout Integration toggle is enabled in Checkout Settings tab, the “Stripe Settings” and “Plaid Settings” tabs are hidden.

Note If the data is not filled in, the ACH Direct Debit tab will not be displayed on the community payment form.

Engagement Score Settings

Set up a point system to reward users for being active.

The engagement score will be displayed on the Member Card component calculated together with Salesforce’s native reputation points.

Please run the ReputationPointsScheduler job in MemberSmart Settings to enable awarding users reputation points based on configurations in Engagement Score Settings.

Reputation points from the selected site will be updated on the component once a day.

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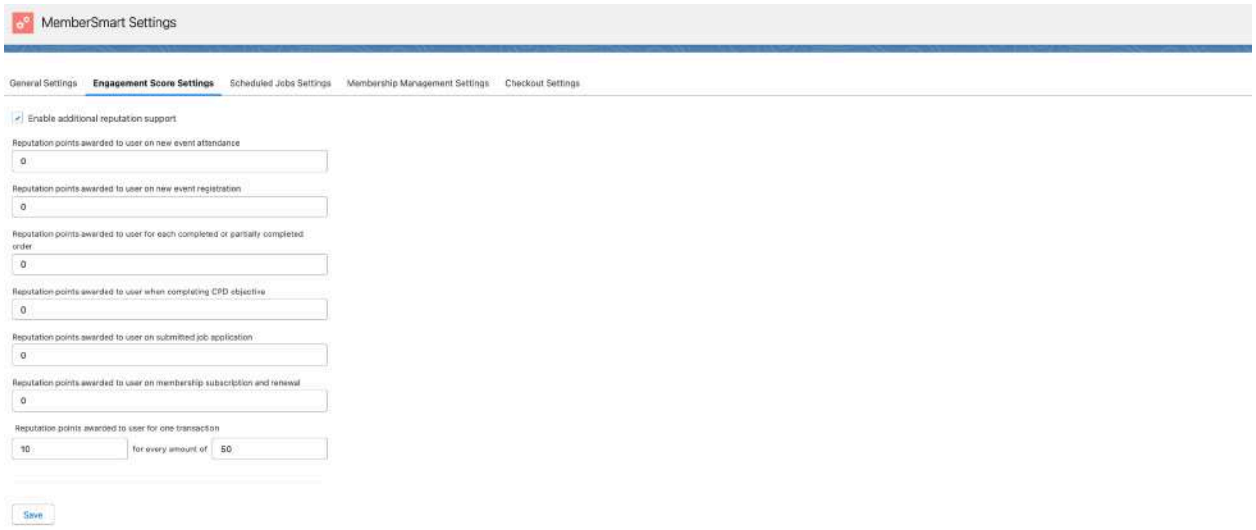

Fields:
Maximum allowable value – 999999

- *Enable additional reputation support* – checkbox field, default value - disabled
    - Enable the checkbox to start awarding users for additional activities mentioned below the checkbox
- *Reputation points awarded to user on new event attendance*
    - Define a number of points to be awarded to a user for the activity
- *Reputation points awarded to user on new event registration*
    - Define a number of points to be awarded to a user for the activity
- *Reputation points awarded to user for each completed or partially completed order*
    - Define a number of points to be awarded to a user for the activity
- *Reputation points awarded to user when completing CPD objective*
    - Define a number of points to be awarded to a user for the activity
- *Reputation points awarded to user on submitted job application*
    - Define a number of points to be awarded to a user for the activity

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- *Reputation points awarded to user on membership subscription and renewal*
    - Define a number of points to be awarded to a user for the activity
- *Reputation points awarded to user for one transaction*
    - Add points for a defined amount of money spent by the user for each transaction (for example, give the user 100 points for $1000 he spent for one transaction)
- Save

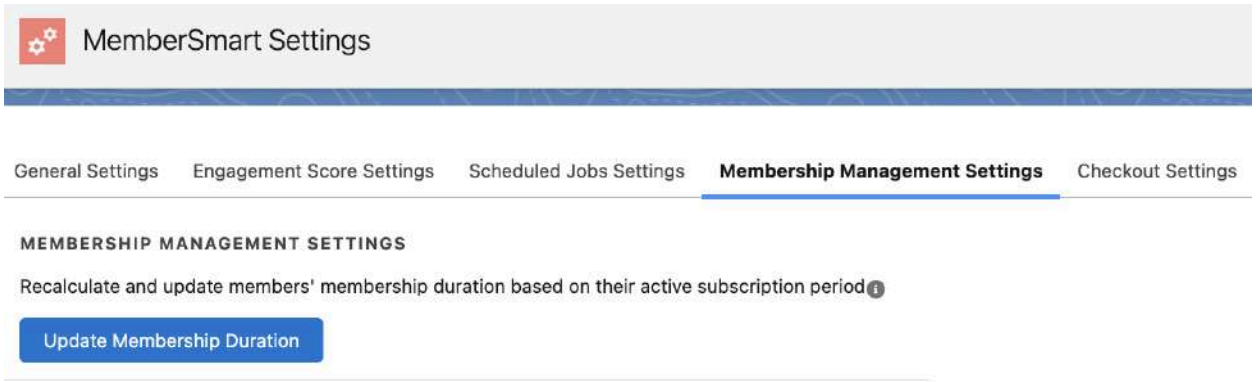
Reputation Points settings are dynamically hidden if the related packages are not installed. This means that if any of the packages associated with the setting is not installed, the corresponding field will not be displayed.

Scheduled Jobs Settings

In this tab, you can enable or disable the scheduled jobs. For more detailed information about their behavior, refer to the Scheduled Jobs section.

Membership Management Settings

Membership Management Settings



Recalculate and update the Membership Duration and Membership Activation Date fields on member contact records based on their active membership period. This action is intended to be performed once.

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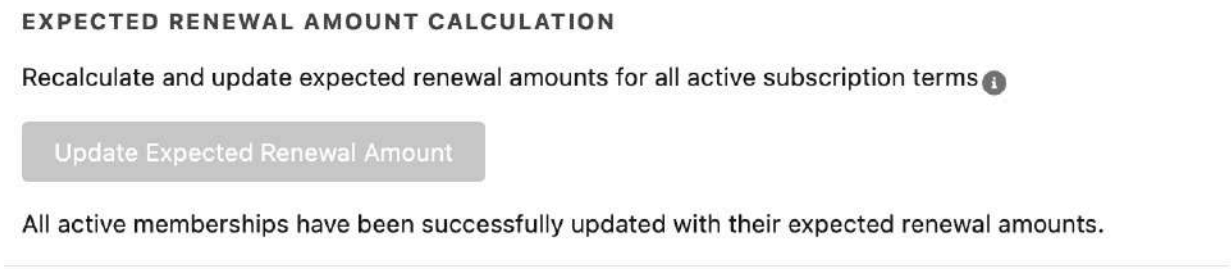
After clicking the button, a progress bar will display the number of processed and total records.

Once the updates are complete, the button will become inactive, and the following text will appear below it: 'All members' membership durations and activation dates are up to date.'

Expected Renewal Amount Calculation



Allows admins to recalculate and update the Expected Renewal Amount field on all active subscription terms.

Behavior:

- Clicking the button recalculates and updates the *Expected Renewal Amount* for all active subscription terms where:
    - Subscription Status = *Active*
    - Subscription Term Start Date ≤ Today ≤ Subscription Term End Date
- A progress bar is displayed during the update.
- After completion:
    - The button is temporarily disabled.
    - A success message is shown:
      “Expected renewal prices for all active memberships have been successfully updated.”
- On page refresh, the button becomes active again and the success message is hidden.
- There is an option to enable a scheduled job (MbrSmart.ExpectedRenewalAmountUpdaterScheduler) from the Scheduled Jobs Settings. This job automatically recalculates and updates the Expected

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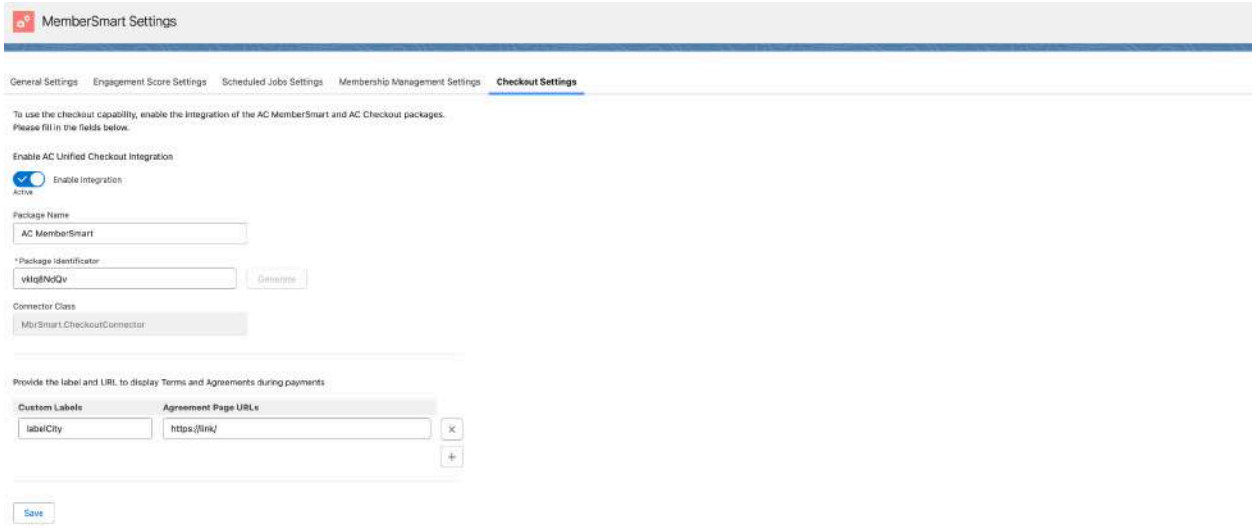
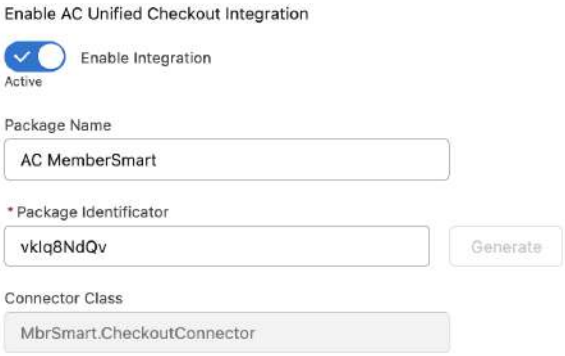
Renewal Amount for all active subscription terms. However, we recommend using the manual button instead to avoid overloading the system.

Checkout Settings



AC MemberSmart is integrated with the AC Unified Checkout app, allowing a membership subscription to be added to the cart during the registration process. This enables users to complete the checkout along with other items.

Enable the integration



To use the checkout capability, enable the integration of the AC MemberSmart and AC Checkout packages. Please fill in the fields below.

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- *Enable AC Unified Checkout Integration*
  Activate the toggle to enable the integration.
- *Package Name*
  Pre-filled with the name of the package by default.
- *Package Identificator*
  Filled in automatically after the “Generate” button is clicked. Use the generated value to connect the two apps in the AC Unified Checkout application settings tab.
- *Connector Class*
  System field.

The tab is displayed when the AC Unified Checkout app is installed on the org only.

Display Terms and Agreements during payments

This setting allows admins to display Terms and Conditions (or any relevant agreements) that users must acknowledge during payment. When configured, a checkbox with a hyperlink to the provided agreement will appear during the following payment flows:

- Finalize Payment screen during standard checkout
- Trial subscription “Pay Now” flow
- Membership renewals with payments

The user must check this box before proceeding with the payment, ensuring legal compliance and informed consent.

Click the ➕ Add a new Payment Agreement button to configure a new agreement. Each agreement requires two fields:

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- *Label*
  This is the clickable blue link that will appear as part of the agreement text (e.g., “Terms and Conditions”).
- *URL*
  The full link to the external agreement or document (e.g., https://example.com/terms). Must begin with https:// or http://.

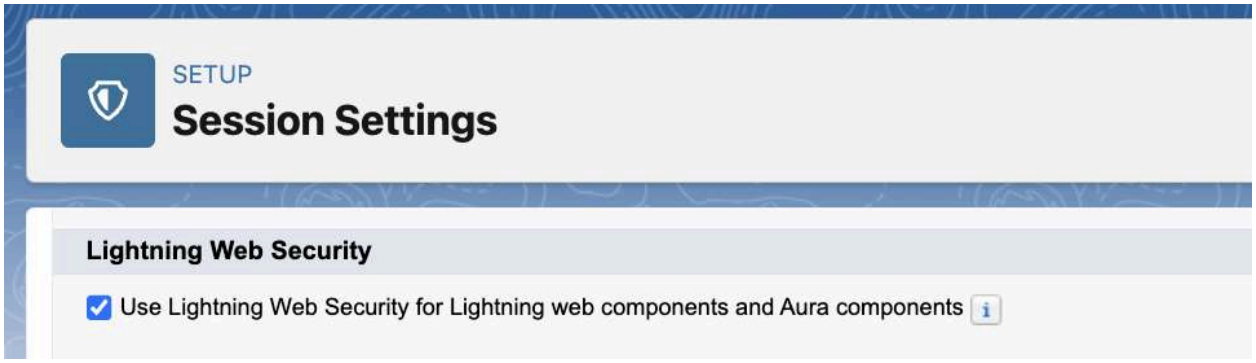
Multiple agreements can be added, and each will appear as a separate linked label within the agreement statement.

When agreements are configured, the following message appears on the payment screen, with your custom labels embedded as hyperlinks: “By proceeding, I confirm my authorization for this payment and acknowledge that I have reviewed and agree to the [Label 1], [Label 2], [Label 3].”

Standard Settings

To ensure seamless payment processing and the creation of payment methods within the system, it is crucial to enable the following setting:

Setup – Session Settings – Use Lightning Web Security for Lightning web components and Aura components.



To ensure the Member Registration Flow functions correctly, it is necessary to enable the *Allow External User Self-Registration* setting in Salesforce from Setup – Digital Experiences – All Sites – Administration – Login & Registration.

Creating and Managing Membership Products and Subscriptions

We provide a system for managing your members and improving their experiences.

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Here is the step-by-step process for creating a membership product, configuring its price, and manually assigning a subscription to users, record by record.

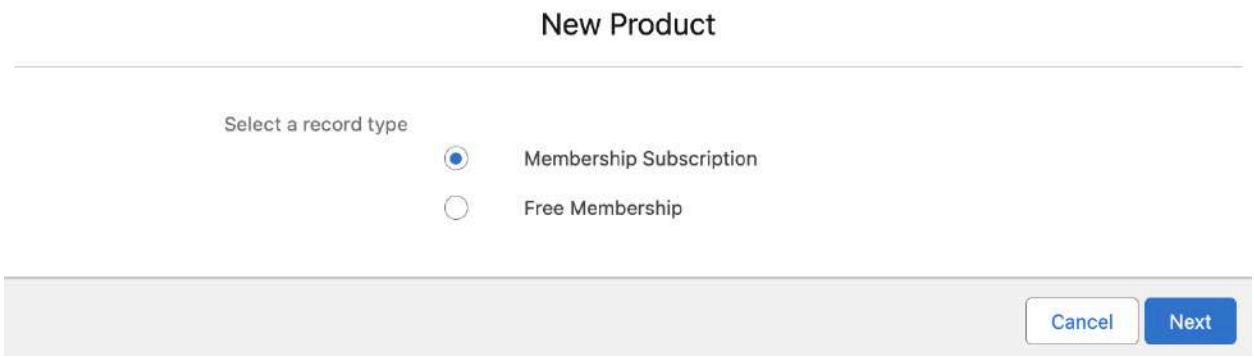
Note As an admin, you can assign a membership subscription manually, use the internal wizard, or process internal renewals. Community and guest users can also initiate subscriptions through the Experience Cloud site via self-registration and renew.

The steps below describe creating all the required records manually.

1. **Add a Product**

The subscription process starts with creating a Product.

Note Before creating a product, please assign the “Membership Subscription” and “Free Membership” page layouts to the needed profiles through Setup - Object Manager - Product - Page Layout - Page Layout Assignment. Go to the Products tab, click New, and select Membership Subscription record type.



We provide custom record types in our package. Your admin can create a main/default record type if needed for any other use cases.

Membership Subscription record type is used for paid subscriptions.

Free Membership record type is used for free subscriptions.

Membership Subscription

Fields to fill in:

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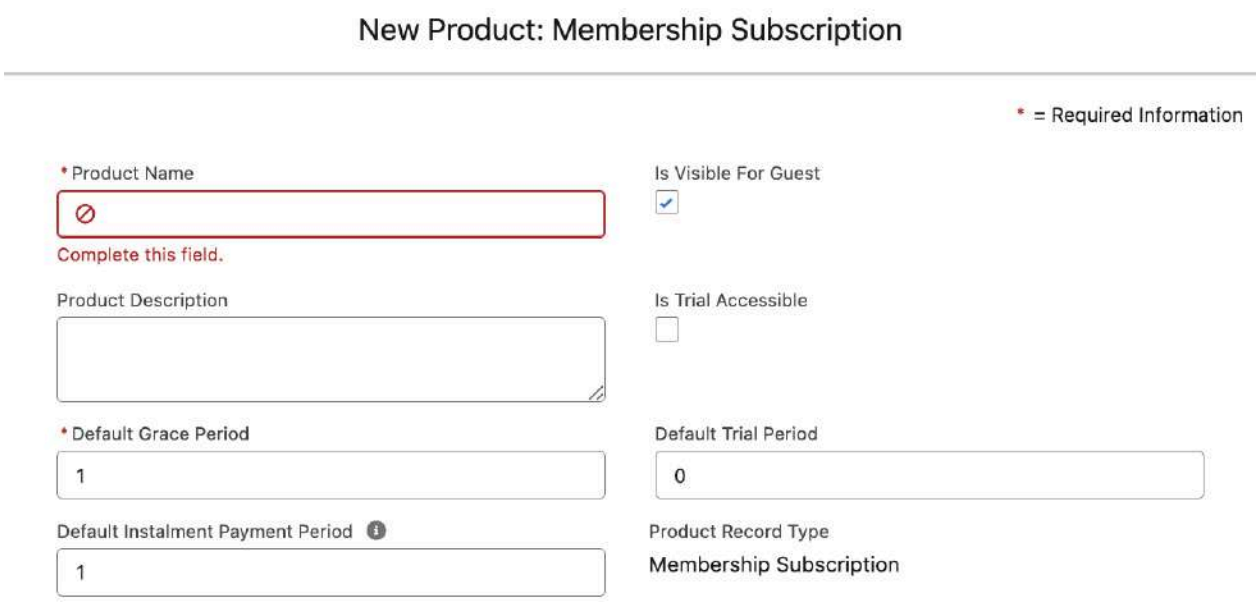

- Product Name
    - Enter the name of the membership product
- Add Product Description
    - Provide a description of the membership product
- Default Grace Period
    - Define the number of days a member can remain subscribed without submitting payment
    - Note: Values entered in this field are automatically rounded
- Default Instalment Payment Period
    - Set the default number of days allowed for paying membership instalments generated for this product
- Is Subscription Product
    - This checkbox is automatically selected when the product is created with the Membership Subscription record type

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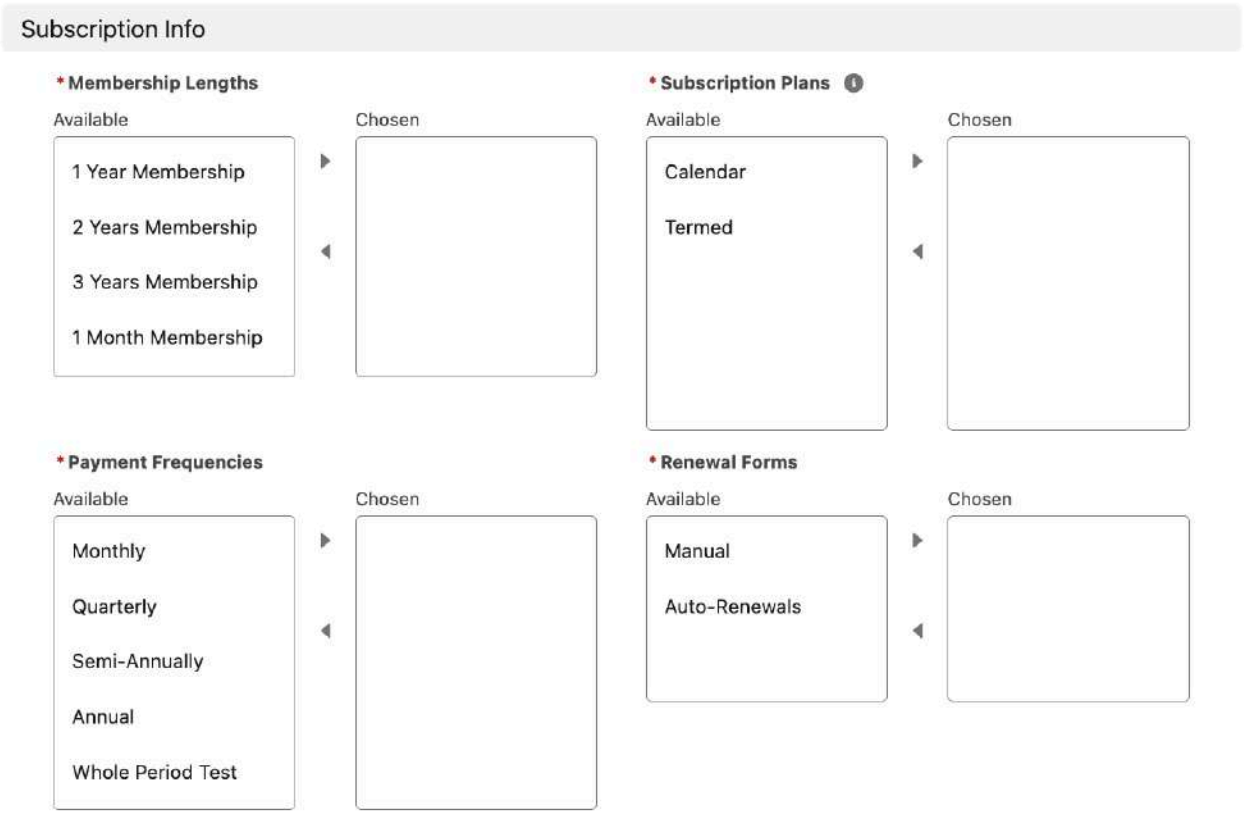
- Is Visible For Guest
    - Check this box to make the product visible to guest users on the site
- Is Trial Accessible
    - Enable trial period for this product
    - See the Trial Period section for more information
- Default Trial Period
    - Set the number of days for the trial period
    - Enable trial period for this product
    - See the Trial Period section for more information

Add subscription info:



- Membership Length

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    - Add all options to let members decide if they'd prefer to subscribe for a membership for one year, two years or three years, or choose only one option if needed

- Subscription Plans
    - Assign a subscription plan to your product (**select one option**):
        - If Plan=Termed,
          Start Day = current date
          End Date = Start Date + chosen Membership Length
        - If Plan=Calendar,
          Start Day = first day of current month
          End Date = Start Date + chosen Membership Length
- Payment Frequencies
    - Define payment frequency options for the product
- Renewal Forms
    - Define the renewal form for the membership product - automatic or manual. If both options are selected, a user will have the ability to select the renewal form when registering as a member
    - When the auto-renewals option is selected, a new Subscription Term is created only if Subscription Status = "Active"
- Save

We suggest creating a separate list for the membership subscription products.

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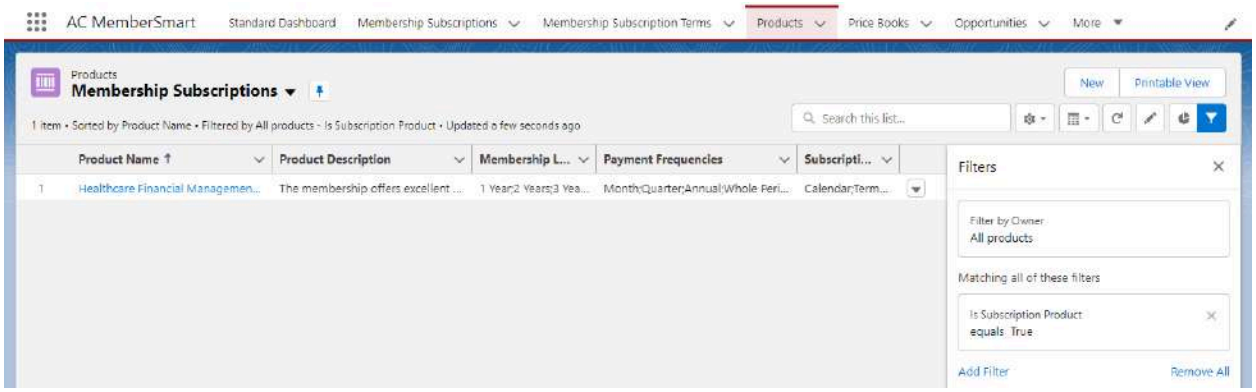

Free Membership

Fields to fill in:

For detailed information about each field, refer to the descriptions provided above.

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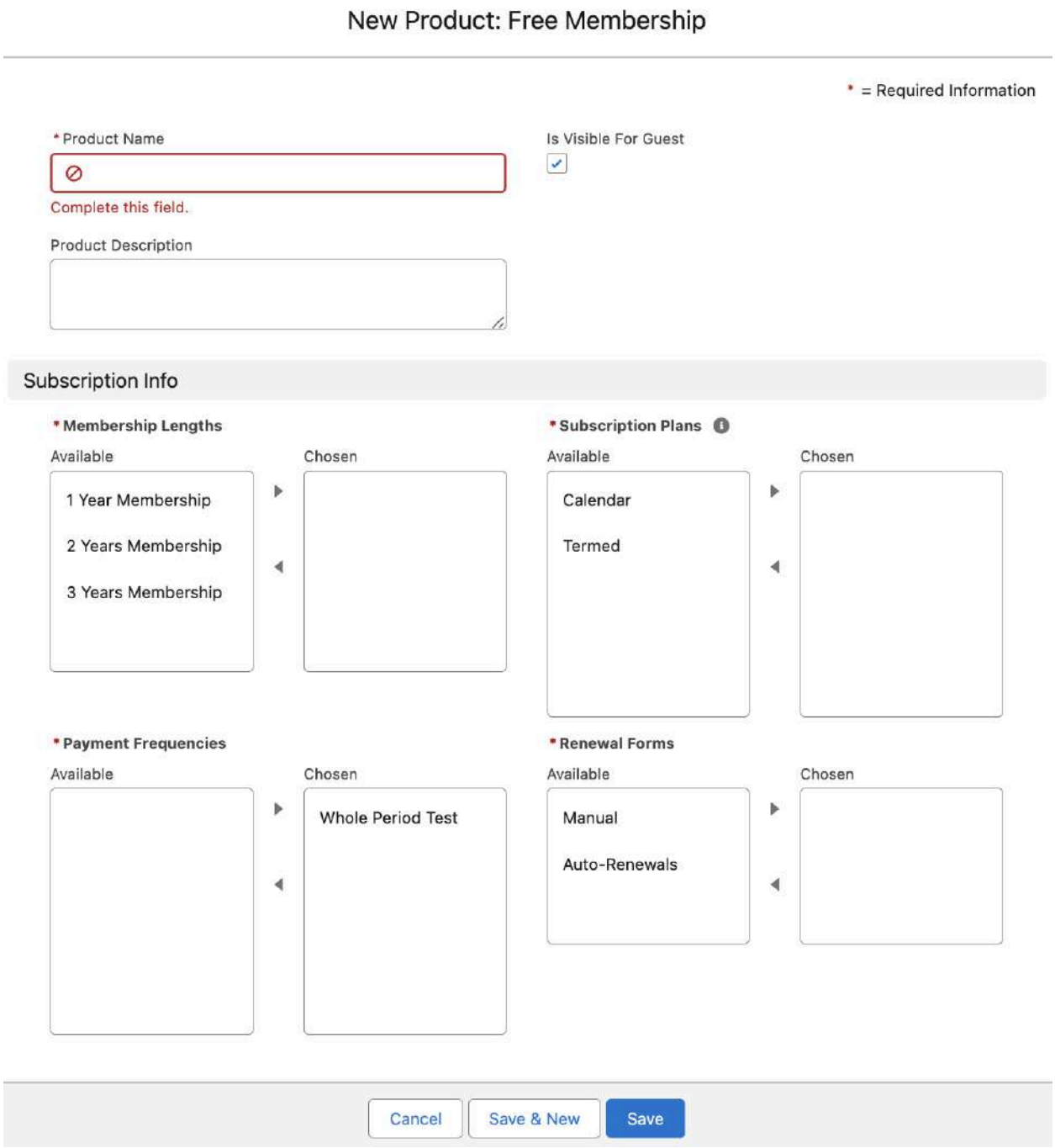

2. Add Product To Pricebook

Pricebook defines the subscription fee for your membership product.

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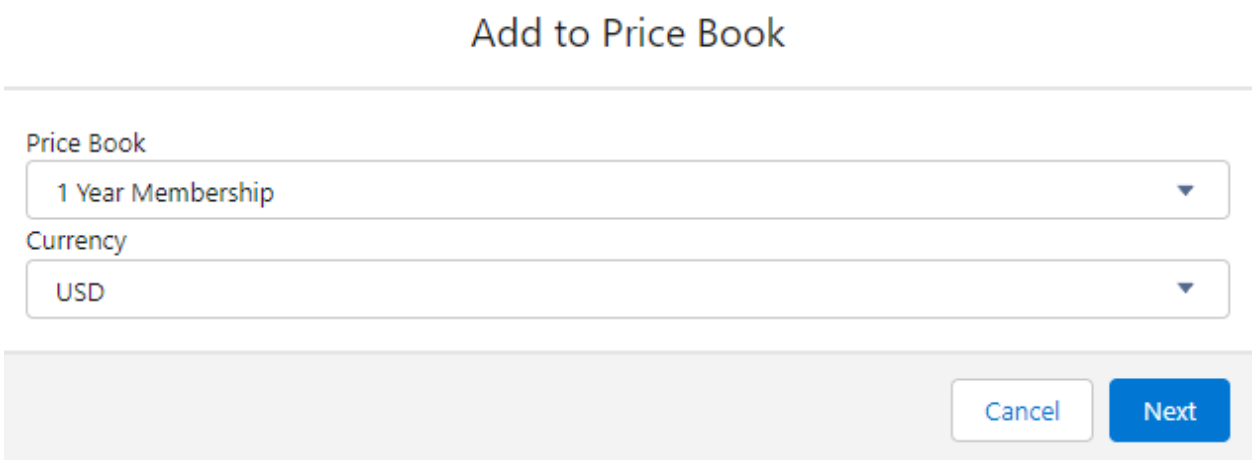
Add the created product to a price book from the Related tab.

- Add your product to the standard price book first
- Create a price book for your product or add it to the existing one



Note When deleting a Price Book record, the associated Pricebook Relations will also be deleted.

3. Configure Subscription to Pricebook Relation (Legacy)

The next step in configuring a membership subscription fee. After creating Price Books as described above, create a Subscription to Pricebook Relation, if you prefer to use the default pricing functionality. However, we highly recommend configuring the price using our dynamic (advanced) pricing functionality. Please refer to the following section.

Here, we need to link the created price books with the membership lengths we've established. By default, all Pricebook Relations should at least depend on the Subscription Term Length. This is a mandatory step.

Go to the Pricebook Relation tab and click "New":

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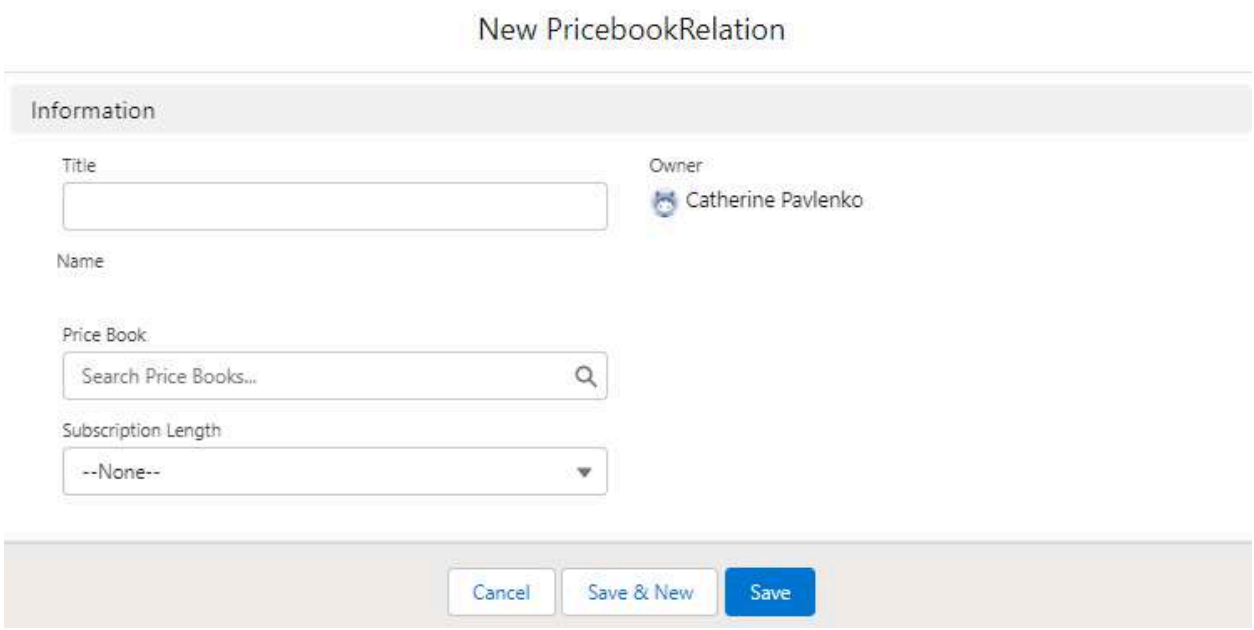

Fill in the fields:

- ***Title***
    - Enter the title
- ***Name***
    - Autogenerated field
- ***Price Book***
    - Price book defines the subscription fee for a membership product. Select the existing price book from the picklist
- ***Subscription Length***
    - Select Membership Length - 1 Year, 2 Years, 3 Years - for the previously selected price book.

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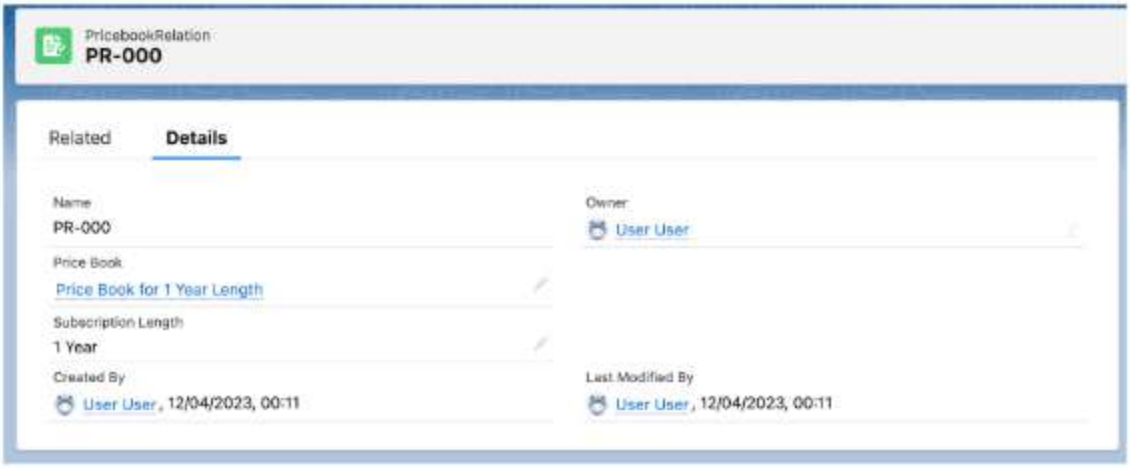

In different business scenarios, the price may depend on various parameters, not only the Subscription Term Length.

Configure more complex Membership Subscription to Pricebook Relation as described in the Configure Membership Subscription Fee.

By default, all Pricebook Relations should depend on the Subscription Term Length at least.

4. **Create Membership Subscription**

As an admin, you can create and assign a membership subscription manually, as described below, or using the internal wizard. Community or guest users can also do this through the Experience Cloud site via self-registration.

Note Before creating a Membership Subscription, please assign the “Membership Subscription” page layout to the needed profiles through Setup - Object Manager - Membership Subscription - Page Layout - Page Layout Assignment.

Note The layout contains both the Contact and Account fields by default. Your admin can configure the page layout according to your use case. Make sure all the fields are displayed on the layout.

Go to the Membership Subscription tab and click “New”

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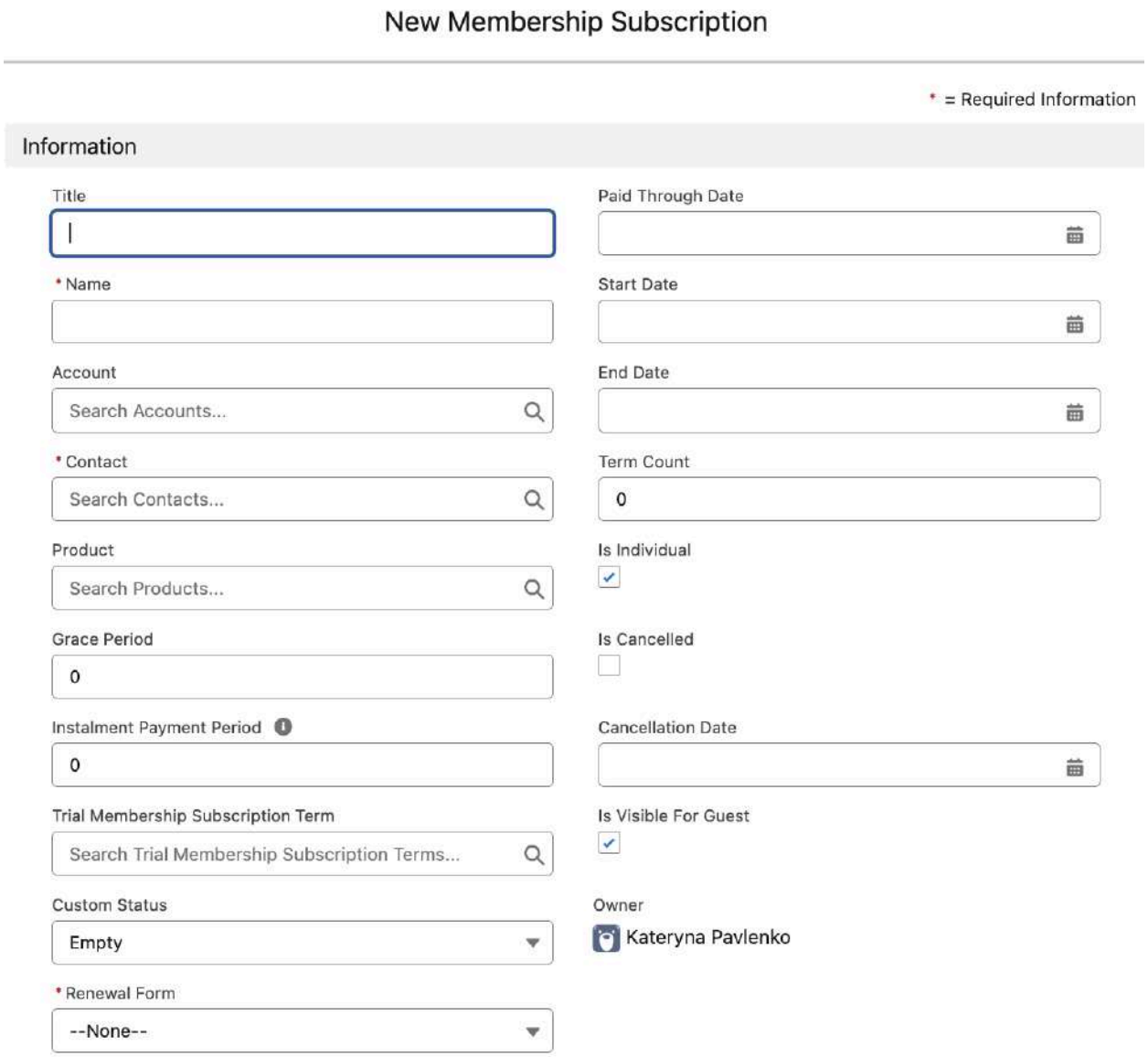

Fill in the fields:

- Name
    - Enter a name in the following format:
      Product name: Contact name (e.g. HFMA Association: Katie Johnson)
- Account

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    - Select existing Account
- Contact
    - Select existing Contact
- Product
    - Select Product
- Grace Period
    - Enter Grace Period if needed (how many days a payment can be delayed)
    - Numbers entered in the Grace Period field are automatically rounded
- Instalment Payment Period
    - Specify the number of days designated for members to complete payment for their instalments
- Trial Membership Subscription Term
    - Represents the trial term linked to the subscription, applicable if the subscription was created with a trial period
- Custom Status
    - An admin-defined picklist field that overrides the packaged subscription status field. Available options: Empty (default), Active, Pending, Suspended, Canceled, Expired
- Renewal Form
    - Select the renewal form for the membership subscription
- Paid Through Date
    - A read-only date field that indicates up to which date the subscription has been paid.
    - It is automatically populated when a related Instalment from an active Subscription Term is marked as Closed Collected.

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⚠️ Do not edit this field manually; instead, update the related Instalment to maintain data accuracy

- Start Date
    - Indicates when the subscription begins. This field is auto-populated based on the Start Date of the first Subscription Term
    - Note: the Subscription Term's Start Date, Instalment Due Date, and Instalment Expiry Paid Date will align with this value
    - ⚠️ Do not edit this field manually
- End Date
    - Indicates when the subscription ends. This value is automatically set to match the End Date of the last Subscription Term.
    - ⚠️ Manual changes are not recommended, as it may desynchronize related records
- Is Individual
    - Automatically filled in when the type of the subscription is an individual subscription
- Is Visible for Guest
    - Defines if the subscription record should be visible for guests (validation rule should be configured correctly by this field)
- Term Count
    - Displays the number of existing membership subscription terms
- Is Cancelled
    - If checked, the Status field automatically changes to "Canceled"
- Cancellation Date
    - Defines when the subscription was cancelled

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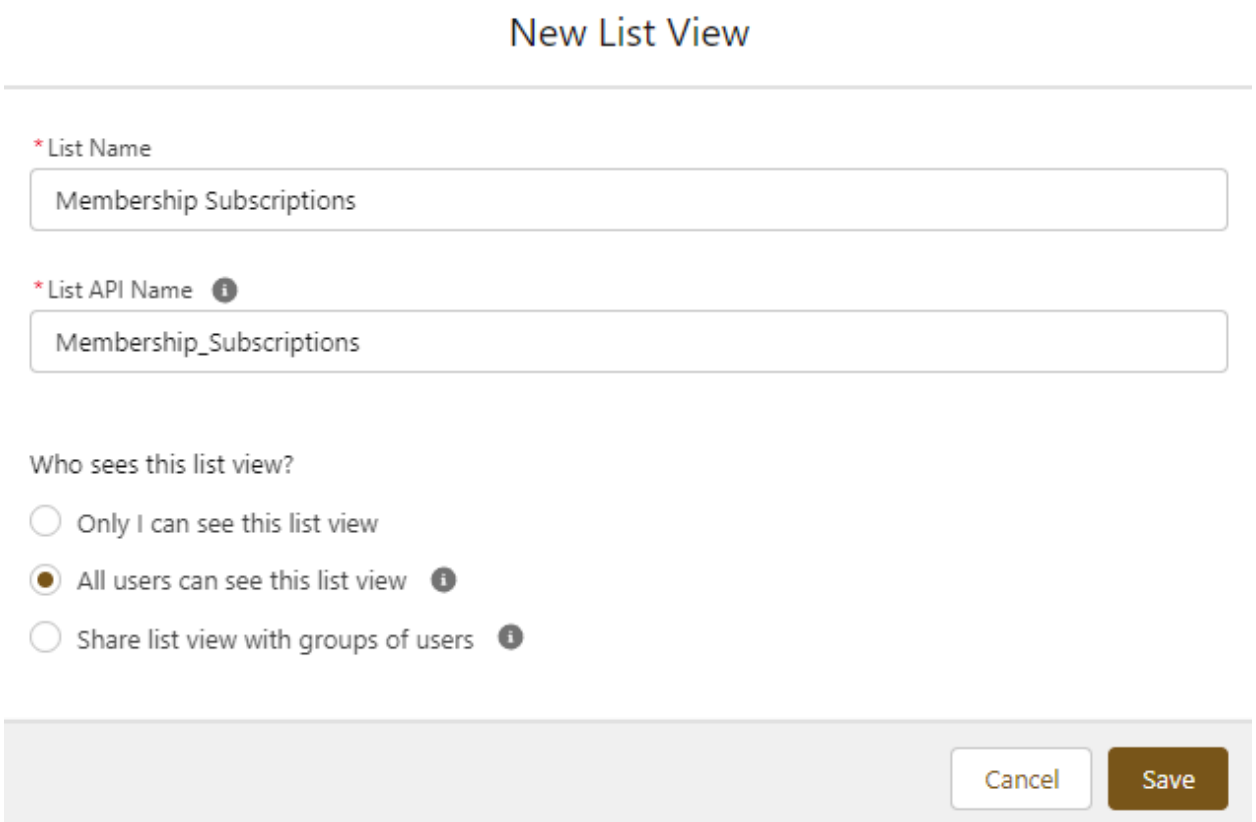
- Save

Note We provide the ability to assign the membership subscriptions to your users with the help of the internal wizard instead of creating records separately. See the Internal Wizard section.

Important Please DO NOT **fill in** the “Start Date”, “End Date”, “Paid Through Date” and “Term Count” fields. The fields will fill in automatically after creating a membership subscription term.

Important Please, DO NOT **edit** those fields manually after the membership subscription is created.

Note We suggest creating a list view to display all your subscriptions.



5. Create Membership Subscription Terms

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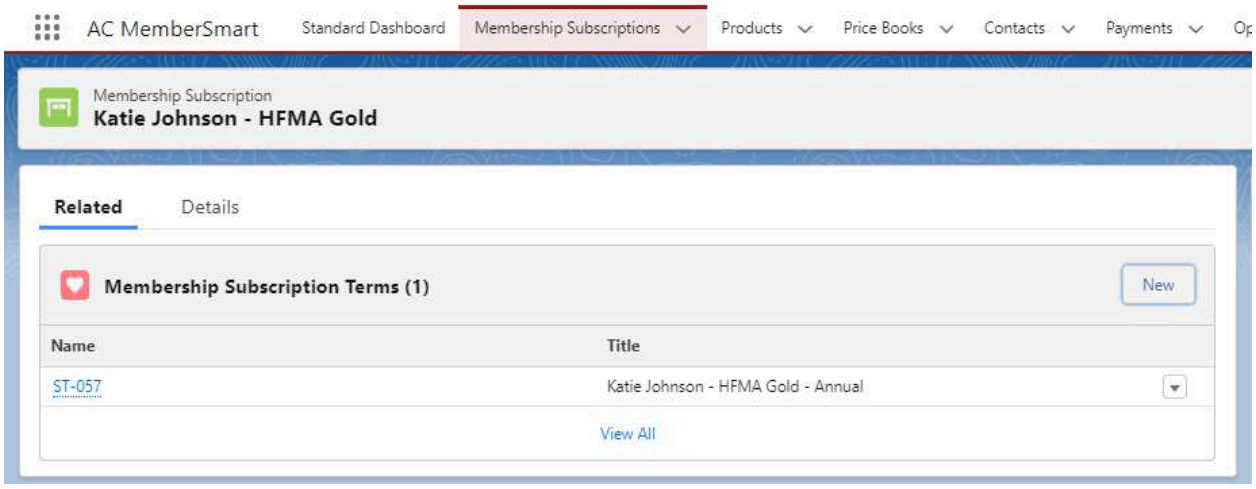
Note Before creating a Membership Subscription term, please assign the “Membership Subscription Term” page layout to the needed profiles through Setup - Object Manager - Membership Subscription Term - Page Layout - Page Layout Assignment.



From the Membership Subscription record, go to the Related tab and click New on the Membership Subscription Terms object to assign a paid term for a member.

If you want to assign a trial period instead of a paid term, please refer to the Trial period section.

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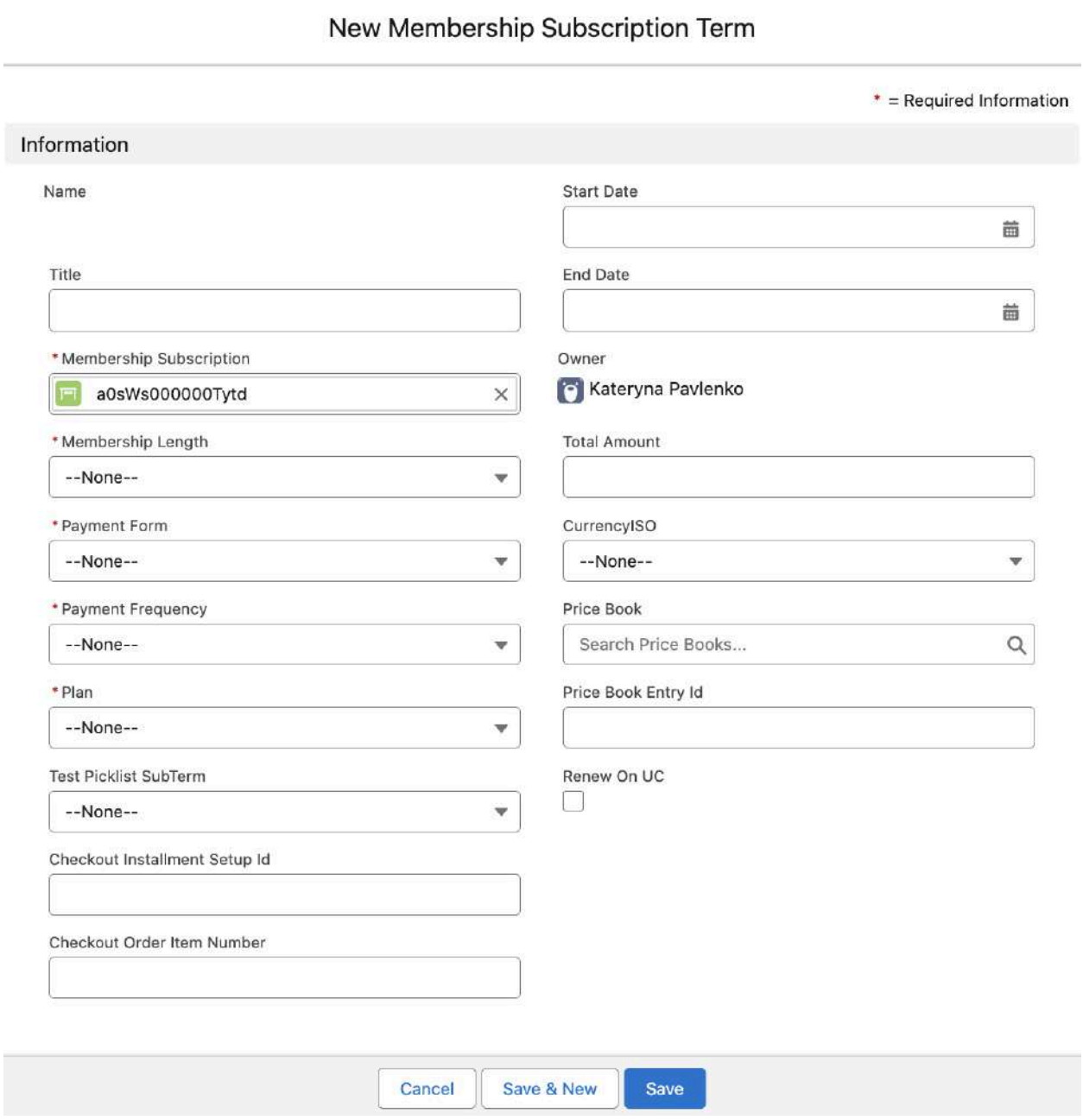

Fill in:

- Name
    - Auto-generated field in the format ST-{000}. You cannot edit this field; it is populated automatically when the record is created

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- Title
    - A descriptive text field (up to 255 characters) for the subscription term. Automatically populated with a combination of the subscription name, start date, and end date, but can be manually overridden. Values longer than 255 characters will be truncated.
    - Enter Title manually in the following format:
      Product name: Contact name Start date: End date
      (e.g. HFMA Association: Katie Johnson 2022-11-14:2024-11-13)
- Payment Frequency
    - Picklist field (global value set: Payment Frequency). Required. Defines how frequently payment is expected (e.g., Monthly, Quarterly, Annually, Whole Period)
- Membership Length
    - Picklist field (global value set: Subscription Length). Required. Defines how long the subscription term lasts (e.g., 1 Year, 2 Years, etc.). Options must align with values supported in the Subscription Term Interval Generator flow
- Payment Form
    - Picklist field. Required. Specifies how payments are handled:
        - Manual – Payment is collected manually (e.g., invoice, Finalize Payment)
        - Auto-Payments – Payment is handled automatically by the RecurringPaymentsScheduler
        - Free – No payment required (only applicable for products marked as free)
    - Define Payment Form
      When registering from the community, “Auto-Renewals” option is selected by default
- Plan

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    - Picklist field (global value set: Subscription Plan). Required. Determines how the Start Date is set:
        - Calendar – Start Date is the 1st of the month
        - Termed – Start Date is the current day (today)
- Membership Subscription
    - Lookup to the related Subscription record. This is a required field and defines which subscription this term belongs to
- Checkout Installment Setup Id
    - Automatically populated after the related Order Item is created in Checkout. Indicates the Checkout Installment Setup associated with the subscription term. Required for automation such as Finalize Payment and Renew Orders
- Checkout Order Item Number
    - Automatically populated after the related Order Item is created in Checkout. Used for syncing status updates with the Checkout package
- Start Date - date field, default value – blank
    - Auto-populated by the system (trigger-based) depending on the selected Plan. ⚠️Cannot be set manually—Calendar plans default to the 1st of the month, Termed plans default to TODAY
- End Date - date field, default value – blank
    - Auto-calculated based on the Start Date and Membership Length using the Subscription Term Interval Generator flow. ⚠️Cannot be set manually
- Total Amount
    - Currency field. Represents the total cost of the term. Auto-filled based on the Price Book Entry's Unit Price through the pricing engine (synchronously or asynchronously, depending on record creation context)
- CurrencyISO

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    - Picklist (global value set: Currencies). Automatically populated to reflect the currency of the related Price Book Entry

- Price Book
    - Lookup field. Links the term to a specific Price Book. Populated automatically if not set during creation, as part of the price formation process
- Price Book Entry Id
    - Text field. Specifies which Price Book Entry this term uses. Populated automatically based on the associated product and price configuration
- Renew On UC
    - Checkbox. Indicates if the “Renew Orders” logic should apply for this term. Should be enabled for all terms following the initial one in a subscription (or for the first term if renewal is desired). If TRUE, the Checkout Installment Setup ID and Order Item Number must be present
- Expected Renewal Amount
    - Stores the calculated price of the next renewal term for reporting and dashboard purposes.
    - Behavior: Field is blank upon record creation. Value is updated either manually (via the Update Expected Renewal Amount button in MemberSmart Settings) or automatically (via the scheduler)
- Save

Important Please, DO NOT **edit** any fields after the membership subscription term is created.

Note We provide the ability to assign the membership subscriptions to your users with the help of the internal wizard instead of creating records separately. See the Internal Wizard section.

6. Instalments

Go to the Instalments tab to see the created records.

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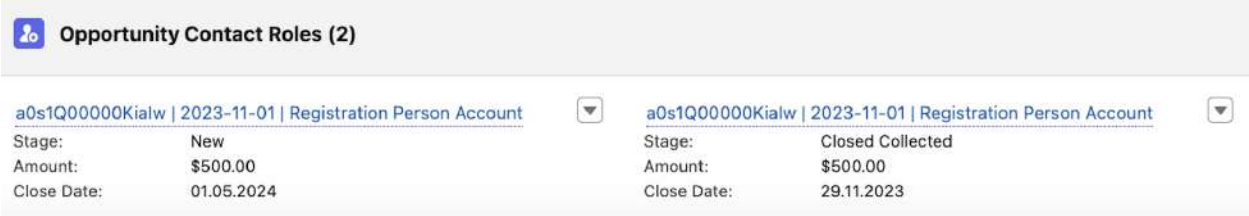
Instalment is a custom object. Instalments represent sums of money due as part of a series of equal payments throughout a Subscription Term, spread over a period of time. Instalment records track details such as the involved parties, payment due dates, and the sales amount

When the 'Enable Opportunities Synchronization' setting is turned on, opportunities are created along with instalments.

Note For person accounts, opportunities are displayed on the 'Opportunity Contact Roles' component in the related list



The number of created instalments/opportunities depends on the membership subscription length and term you select when registering. For example, if you select 2 years membership length with a quarterly payment frequency – eight instalments/opportunities will be generated.

Note Do not add subscription products to the Product component in the Related tab on the Opportunity record.

Instalment Statuses

The Status field on the Instalment object is a required picklist that updates automatically based on specific conditions and processes. Below are the possible statuses and their logic:

- New
    - Instalments are assigned the New status by default when the Subscription Term is created.
- Invoiced
  Instalments receive the Invoiced status either through an update (applied to existing records via a scheduled job) or at the time of creation (when instalment records are automatically generated for a paid subscription), depending on the following conditions:

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    - Scheduled job: Existing instalments are assigned the Invoiced status by the InvoiceInstalmentScheduler, and an invoice is sent using the “Invoice” email template (if activated).
    - Records generation: Instalments are assigned the Invoiced status immediately upon creation if **all** of the following conditions are met:
        - It is the first instalment of the subscription.
        - The related subscription term has Payment Form = Manual.
        - The subscription term starts in the current month (i.e., the Start Date is not manually set to a past date).
        - AC Checkout is not installed or is disabled in the org.
- Pending
    - Assigned when the payment is in the processing stage, such as ACH or Bacs (Native Payments only). This status appears when the Payment Transaction is created with status = “Pending”.
- Closed Collected
    - Assigned when payment is successfully collected (for Native Payments only: Payment Transaction was created with “Completed” status).
    - A receipt is sent using the “Receipt” email template (if activated).
- Failed
    - Assigned when payment fails due to reasons such as insufficient funds, incorrect bank details, or incorrect card information (for Native Payments only: Payment Transaction was created with “Failed” status).
    - A Payment Failure notification is sent using the “Payment_Failure” email template (if activated).
- Closed Rejected
    - Assigned when an Instalment’s close date expires.
    - Status is updated automatically by the ExpiredInstalmentScheduler.

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- Cancelled
    - Assigned when an Instalment is cancelled under the following conditions:
        - A previous Instalment's status changes to Closed Rejected, and
        - The Enable Closing Instalments setting in General Settings is enabled.
- In Progress
    - Assigned when an Instalment is actively being processed for payment (for Native Payments only: Payment Transaction was created with "In Progress" status).
    - Common scenarios:
        - The user is entering payment details on the Payment Form.
        - The user places an order (if Checkout is enabled).
        - The Instalment is processed as part of Recurring Payments.

Final Instalment Adjustment for Recurring Payments

To prevent overcharging due to rounding, the final instalment amount is adjusted for payments divided into multiple instalments where rounding might cause discrepancies. This ensures the total matches the original payment amount.

How it works:

- Initial Calculation:
    - Divide the total payment (e.g., $100) by the number of instalments (12): $8.3333…
    - Round to the nearest cent for the first 11 instalments: $8.34 each.
- Final Instalment Adjustment:
    - Multiply $8.34 by 11: $91.74.
    - Subtract from the total ($100): $8.26 for the final instalment.

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This ensures accuracy by aligning instalments with the total payment and provides fair and predictable billing for users. This adjustment applies only to payments split into multiple instalments where rounding differences could otherwise cause minor overcharges.

7. **Membership Subscription Status**

If the instalment/opportunity is paid, the status of the membership subscription will be defined as *Active*.

Membership subscription with *Suspended* status means that the instalment/opportunity was not paid (insufficient funds, incorrect bank details or the payment process was skipped when registering as a member).

More details: when the opportunity is paid, the **Paid Through Date** field on the membership subscription is updated with the value of the **End Date** field of the opportunity. If the **Paid Through Date** field value is greater than the current date - the status changes to Active, if it is less - the status changes to Suspended.

Important Please note that we do not recommend deleting default payment methods from the internal environment without assigning the new ones as this action will affect recurring payments processes. **Recurring payments require a default payment method.**

Note Users are prevented from creating membership subscriptions for the same product if they already have an active, pending, or suspended subscription.

Note All the records are generated according to the users' time zones.

Membership Status, Activation and Duration Logic

The system automatically calculates membership status, membership activation and membership duration details based on subscription data. These values are used across the platform to reflect an individual's or organization's membership state.

Contact-Level Membership Fields

Field	Description
Individual Member Status	Displays the membership status for a user with an individual subscription.

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Individual Membership Activation Date	Displays the activation date for a user's individual subscription.
Unified Member Status	Formula field that displays "Active Member" if either the individual member status is "Active Member" or the related account has this status.
Unified Membership Activation Date	Formula field that displays the earlier of the two dates: the individual membership activation date or the related account's activation date.
Membership Duration (Days)	Reflects how many days the contact has held active membership status.
Membership Duration Last Modified Date	Captures the last time the duration was recalculated.

Account-Level Membership Fields

Field	**Description**
Organisational Member Status	Displays the membership status of the Account based on organisational subscriptions.
Membership Activation Date	Shows the activation date for the Account's active organisational membership.

Member Status Logic

Track the membership status for an individual subscription or its association with an account.

Status Values: Active Member, Non-Member.

Blank status is displayed on the accounts/contacts that already existed on the org when the AC MemberSmart package was installed.

Contact-Level (Individual Membership):

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A Contact becomes **Active Member** when:

- Contact has an active User (IsActive = true)
- At least one individual subscription with status Active or Pending exists

A Contact reverts to **Non-Member** when:

- The last individual Active or Pending subscription is deleted
- The contact's User is deactivated
- The Contact only has Cancelled, Suspended, or Expired Individual Subscriptions.

Account-Level (Organisational Membership):

An Account becomes an **Active Member** when:

- The Account has an active User
- At least one organisational subscription exists with status Active or Pending

An Account becomes a **Non-Member** when:

- The last Active or Pending organisational subscription is deleted or cancelled
- The Account only has Cancelled, Suspended, or Expired Organisational Subscriptions

Membership Activation Date Logic

The Membership Activation Date is set to TODAY when a Contact or Account becomes an Active Member for the first time.

This date is not updated during renewals or reactivations.

It determines the starting point for membership duration tracking.

Membership Duration Logic

On the contact level, there is the ability to track membership duration and view its details with the help of the following fields:

- Membership Duration Field:
    - This field stores the period of the membership duration for each member in years and months (e.g., 1 Year 5 Months; 2 Years 1 Month). The duration is based on the active membership subscription period.

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- Membership Duration (Days) Field:
    - This field indicates the number of days of the active membership period.
- Membership Duration Last Modified Date Field:
    - This field shows the date when the Membership Duration field was last modified during the execution of the "Contact Membership Updater" scheduled job.
- Membership Activation Date Field:
    - This field displays the date when the member status changed from Non-Member to Active Member. The Membership Duration field starts counting from this date.

Calculation Method:

- If the membership period is more than one year, the number of days is divided by 12 months.
- If the membership period is less than a year, each month is considered as 30 days.
- Display Format: Only years and months are displayed; days are not shown.

Examples:

- Selecting a 1-year membership and paying for the entire period results in an active membership for 1 year, displayed as "1 Year" in the Membership Duration field.
- Choosing a 1-year membership and paying monthly for 3 months results in an active membership for 3 months, displayed as "3 Months" in the Membership Duration field.

Configure Membership Subscription Fee (Legacy)

The next step in configuring a membership subscription fee, after creating Price Books as described above (“Add Product To Pricebook” section), is creating a Subscription to Pricebook Relation.

Below you will find the description of subscription fee configurations. However, we recommend switching to the latest Advanced Pricing functionality, which provides a more flexible and efficient way to configure pricing.

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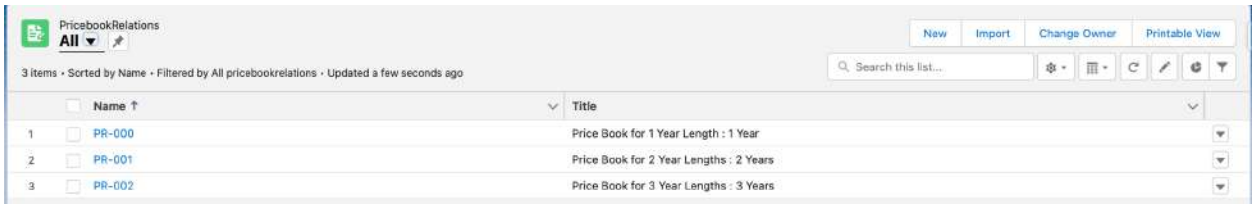
Here, we need to link the created price books with the membership lengths we've established. By default, all Pricebook Relations should at least depend on the Subscription Term Length. This is a mandatory step.

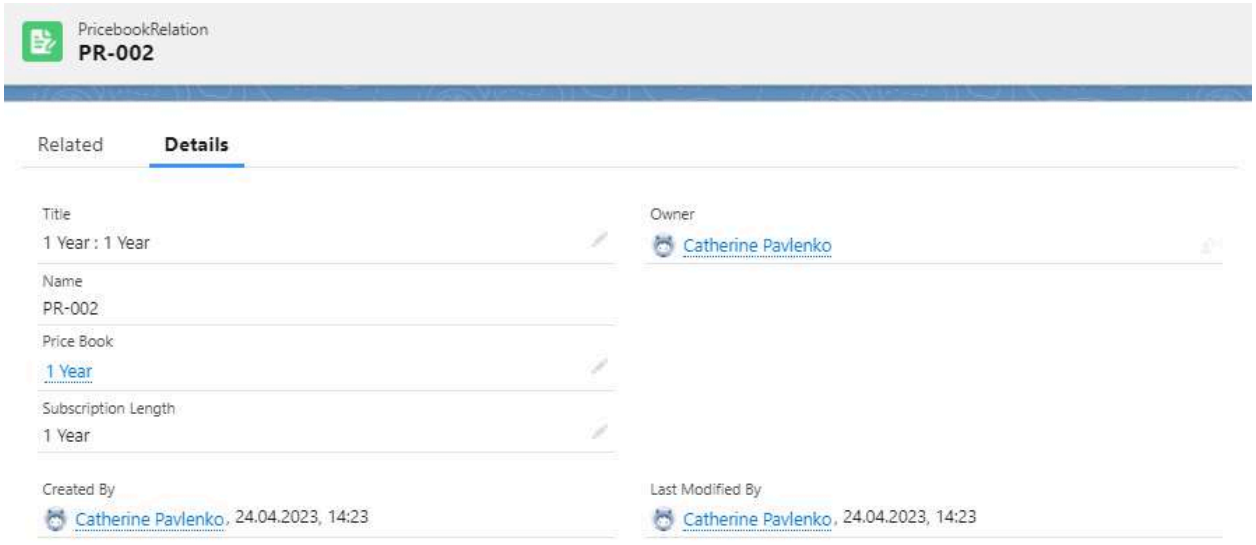
Go to the Pricebook Relation tab.



To create a new relation dependent on the membership length, click "New" to create a record.

Fields to fill in:

- *Title.* Enter a title for your record.
- *Name.* Autogenerated number field.
- *Price Book.* Pricebook defines the subscription fee for a membership product. Select the existing pricebook from the picklist.
- *Subscription Length.* Select Membership Length - 1 Year, 2 Years, 3 Years - for the previously selected pricebook.



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In different business scenarios, the price may depend on various parameters, not only the Subscription Term Length, but also factors like User Location, Contact Type, etc.

The Pricebook Relation object allows us to create relationships between these parameters and the corresponding Pricebook ID.

For example, if there is a 1-year membership and there are two Contact Types in the system – Experienced Doctor and Intern – and there is a need for Experienced Doctors to pay $100 for a membership and Interns to pay $200 for the same membership, additional steps would be required.

This would involve:

- Creating separate price books for Doctors and Interns (1 Year Membership - Interns; 1 Year Membership - Experienced Doctors)
- Adding a new Contact Type field on the Pricebook Relation object (through Object Manager) and adding it to the layout
- Creating separate Pricebook Relation records for each Contact Type

Advanced Pricing (Dynamic Pricing Rules)

Use Advanced Pricing to calculate subscription term prices with rules instead of the legacy Price Formation flow. This approach selects a Price Book and price based on flexible, admin-defined conditions and evaluation logic.

Recommendation Use Advanced Pricing for all new configurations. The legacy Price Formation flow remains available but is not used when Advanced Pricing is enabled.

Enable Advanced Pricing

Enable the setting in MemberSmart Settings → General Settings → Pricing Settings, as described here.

What changes when it's on:

- Pricing is driven by **Pricing Rules**.
- The **Generate Product Entries** flow input is disabled (not used with Advanced Pricing).

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- In Member Registration, steps that depended on the legacy flow are skipped automatically.

Pricing Rules and Pricing conditionals are the two building blocks.

Pricing Rules

A **Pricing Rule** selects a **Price Book** when its conditions match. If multiple rules match, the one with the **lowest priority number** wins.

A rule can be:

- **Conditional** (uses conditions + logic), or
- **Default** (no conditions → always applies when active unless another rule with a lower priority matches first).

Key fields you set:

- **Rule Name (Name, Text 80)** – display name.
- **Pricebook__c (Lookup Price Book)** – the Price Book used when this rule applies.
- **Priority__c (Number, Integer)** – lower numbers are evaluated first (Default: 1).
- **Condition_Logic__c (Long Text)** – logical expression using child condition reference keys (e.g., {1} AND ({2} OR {3})). If blank and the rule has conditions, the rule is ignored.
- **Is_Active__c (Checkbox)** – whether the rule can be evaluated (Default: FALSE).
- **Condition_Count__c (Number, Integer)** – auto-maintained count of child conditions.
- **Description__c (Long Text)** – human-readable explanation (auto-populated if left blank).

Pricing Conditions

A condition line item attached to a Pricing Rule. Compares a target field value to a configured value using an operator.

A **Pricing Condition** says “check this field, compare to this value with this operator.”

Examples:

- Term Length = “1 Year”
- Payment Frequency = “Monthly”
- Is Renew = TRUE
- Account Type = “Partner”

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Each condition gets a small **reference number** (e.g., {1}) that you use in the rule's **Condition Logic**.

Key fields:

- **Condition Name (Name, Auto-Number PC-{0000})**
- **Pricing_Rule__c (Lookup)** – parent rule.
- **Target_Object__c (Text 255)** – API name of the starting SObject for the field path. Current support: **MbrSmart__Subscription_Term__c**.
- **Field_Path__c (Text 255)** – dot-notated field path (supports up to 5 relationship levels). Default: **MbrSmart__Length__c**
- **Field_Type__c (Picklist)** – Apex type for comparison (auto-inferred if blank).
- **Value__c (Text 255)** – comparison value (parsed per Field_Type__c).
- **Variable__c (Text 255)** – optional short key to map the field when passing JSON attributes.
- **Operator__c (Picklist)** – SOQL operators: =, !=, >=, <=, >, <, LIKE, IN, NOT IN, INCLUDES, EXCLUDES.
- **Reference_Key__c (Number, Integer)** – numeric identifier used in rule logic (e.g., {1}); must be unique per rule (auto-assigned if blank).
- **Description__c (Long Text)** – auto-generated summary if blank.

Supported field types:

- **String:** Text, Text Area, Email, URL, Phone, Picklist
- **Boolean:** Checkbox
- **Integer:** Number
- **Decimal:** Number (with decimals), Currency, Percent
- **Date:** Date
- **Id:** Lookup, Master-Detail, Formula (Id)
- **Formula:** Any supported primitive type above

How pricing is decided

1. When a **Subscription Term** is created (including via Member Registration), the system:
2. Looks at **active** Pricing Rules.
3. Checks each rule's **conditions** and **condition logic**.
4. If a rule matches, it uses the rule's **Price Book** to get the price for that product.
5. The **first** matching rule by **priority** is used.

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6. If **no rule** matches a specific term length, that **length option is hidden** in the Membership Plan.
7. If **no rules** match at all, the Membership Plan shows the “Contact your administrator” message.

Setup steps for admins

Step 1 — Enable Advanced Pricing

MemberSmart Settings → General Settings → **Enable advanced pricing logic** = ON.

Step 2 — Create a Pricing Rule

1. Go to **Pricing Rules** → **New**.
2. Enter **Rule Name**, select **Price Book**, set **Priority** (smaller = stronger), and **mark Active** when ready.
3. If you’ll add conditions, plan your **Condition Logic** (e.g., {1} AND {2}).

Step 3 — Add Conditions to the Rule

1. Open the rule → **Related** → **Pricing Conditions** → **New**.
2. Choose the field to check (common examples):
    - **Term Length**, **Payment Frequency**, **Payment Form**, **Is Renew**, Account/Contact attributes.
3. Choose the operator (e.g., =, IN) and the value to match (e.g., 1 Year).
4. Save. Repeat for additional conditions.
5. Return to the rule and enter the **Condition Logic** using the reference numbers (e.g., {1} AND {2}).

Tip Start with one default rule (no conditions) at a high priority number, then add more specific rules with lower priorities to override it in special cases.

Step 4 — Member Registration: use the new Membership Plan

When Advanced Pricing is ON, the **Membership Plan** step in the registration flow uses the new pricing logic automatically. No extra admin action required.

Practical example

Use Case: Pricing Based on Contact’s Location

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Purpose: Apply different membership pricing depending on the country of the member's Contact record.

Pricing Rule 1: US Pricing

- **Name:** "US Standard Plan"
- **Pricebook:** Pricebook USA
- **Priority:** 1
- **Condition Logic:** {1}
- **Is Active:** TRUE

Pricing Condition 1:

- **Target Object:** MbrSmart__Subscription_Term__c
- **Field Path:** MbrSmart__Contact__r.MailingCountry
- **Field Type:** String
- **Operator:** =
- **Value:** United States

Pricing Rule 2: International Pricing

- **Name:** "International Standard Plan"
- **Pricebook:** Pricebook International
- **Priority:** 2
- **Condition Logic:** {1}
- **Is Active:** TRUE

Pricing Condition 1:

- **Target Object:** MbrSmart__Subscription_Term__c
- **Field Path:** MbrSmart__Contact__r.MailingCountry
- **Field Type:** String
- **Operator:** !=
- **Value:** United States

How It Works:

- When a subscription is created for a Contact with **MailingCountry = United States**, the "US Standard Plan" rule applies, pulling the price from the **Pricebook USA**.

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- For all other countries, the “International Standard Plan” applies, pulling the price from the **Pricebook International**.

Membership Plan behavior (what users see)

- Recalculates price when users change **length**, **payment frequency**, **payment form**, or **renewal form**.
- Hides term lengths that have **no matching rules**.
- Shows a friendly message if **no pricing** is available for current selections.
- Can accept extra attributes (provided by admins in the configurator) to influence rule matching.

Tips, limits & troubleshooting

- **Start simple.** Create a default rule first, then layer in specific rules with lower priorities.
- **Be precise.** Keep condition values exact (e.g., picklist value must match exactly).
- **When an option disappears.** If a membership length stops showing, there’s likely no active rule matching it—check your conditions/logic.
- **When nothing prices.** Confirm at least one **active** rule exists and that your Condition Logic references valid condition numbers (e.g., {1}, {2}) and matches their intent.
- **Legacy setting disabled.** When Advanced Pricing is ON, the legacy **Generate Product Entries** flow input is disabled by design.

Paid Membership Renewals

Overview

This feature introduces flexible behavior for how renewals are processed. Admins can choose whether subscription renewals should require immediate payment or continue to use the existing logic (which renews the subscription term without payment).

By default, MemberSmart renews a subscription term without requiring payment unless a recurring billing setup is in place. With this new functionality, a setting allows you to enforce immediate payment upon renewal, if desired.

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Note: This feature only works with Unified Checkout (UC) integration enabled and is supported for site-based flows using express checkout.

Activation

To activate this behavior, enable the “IMMEDIATE PAYMENT FOR MEMBERSHIP RENEWALS” setting in MemberSmart Settings – General Settings.

When enabled:

- The user must pay at the time of renewal for the subscription to activate.
- The new term becomes active only after successful payment is completed.

When disabled:

- Renewal proceeds as before — the term is created immediately and paid later (manually or via invoice).

Key Rules and Exceptions

- Immediate payment for renewals applies only if all of the following conditions are true:
    - Unified Checkout (UC) integration is enabled.
    - The renewal is initiated via Member Registration or Membership Manager components.
    - “Renew on UC” = TRUE (true by default for all renewal terms).
    - “Payment Form” = Auto-Payments
    - “Renewal Form” = Auto-Renewals
    - The setting “Immediate Payment for Membership Renewals” is enabled.
    - The membership is not a free or trial plan.

Special Scenario: If Renewal Form = Auto-Renewals but Payment Form = Manual, the system will not require immediate payment on renewal.

Recurring Billing Note: For recurring billing setups, only the first installment is charged immediately when the renewal is processed.

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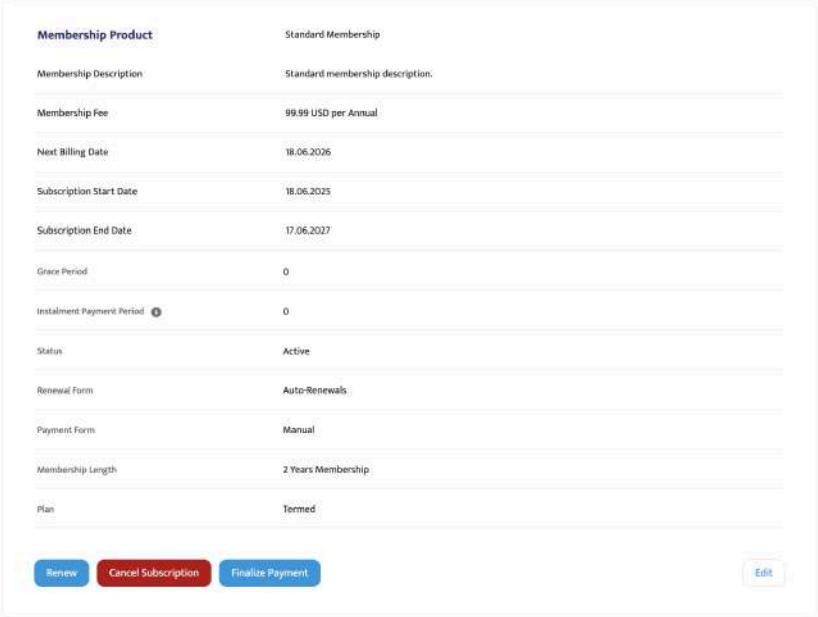
Functional Behavior

Renewal flow

Scenario 1: Manual renewals with payments

1. Initiate Renewal
   The user clicks the Renew button on the Membership Details or Member Registration component.



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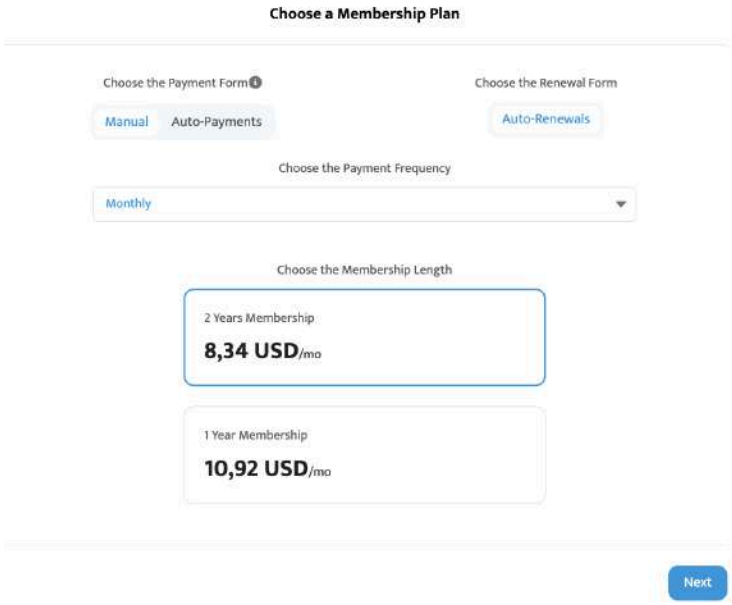
2. Select Membership Options
   On the Membership Plan component, the user selects renewal preferences.



3. Proceed Based on Selected Values
   Depending on the selected values in the Payment Form and Renewal Form fields:
   - If Payment Form = Auto-Payments and Renewal Form = Auto-Renewals:
     - After clicking Next, the system will create the new subscription term and display the Checkout payment screen.
     - The subscription will only become active after the payment is completed.
     - If skipped, the user is redirected to the Finalize Payment screen.
   - If any other combination is selected:

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- After clicking Next, the user sees the Choose How You'd Like to Pay screen.

  - Options displayed:
    - Pay for the next scheduled payment only
    - Pay for the full membership term now
- Click Continue to Payment.
- The system will display the Checkout payment screen, followed by the Checkout success screen.
- As in the first case, the subscription becomes active only after the payment is completed. If skipped, users will need to finalize payment later using the Finalise Payment screen.

Scenario 2: Auto Renewals with Payments

When the renewal is processed automatically (i.e., without user interaction), and the following conditions are met:

- Integration with Unified Checkout (UC) is enabled;
- "Renew on UC" is TRUE (default for all renewal terms);
- The *Immediate Payment for Membership Renewals* setting is enabled;
- Renewal Form = Auto-Renewals;
  Payment Form = Auto-Payments;

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…the system will charge the user automatically using their existing saved payment method. The subscription term will only become **active after a successful payment** is completed. This entire process runs on the backend, and no user interaction is required.

Conditional Display of the Renew Button

To prevent charging users for new subscription terms while previous instalments remain unpaid, the Renew button is displayed only when all instalments for the current term are fully paid.

This rule applies regardless of whether the new “Immediate Payment” setting is enabled or disabled and works for both:

- Native payments
- Unified Checkout integration

Logic rule: If there is at least one unpaid installment (i.e., Status ≠ Closed Collected and Is Expired = TRUE), the Renew button is hidden.

Free Membership Subscriptions

The free membership option allows admins to designate certain membership products as free, enabling community users to subscribe without payment.

Setup for Free Membership Products:

- **Product Level:**
    - Enable the “Is Free” checkbox to identify free membership products (unchecked by default).
    - Products are divided by record types into Free Product and Membership Product. The Is Free checkbox is automatically set based on the record type. The Payment Frequencies section contain only the “Whole Period” option.
    - Free products are assigned for the full subscription period, no instalments are generated.

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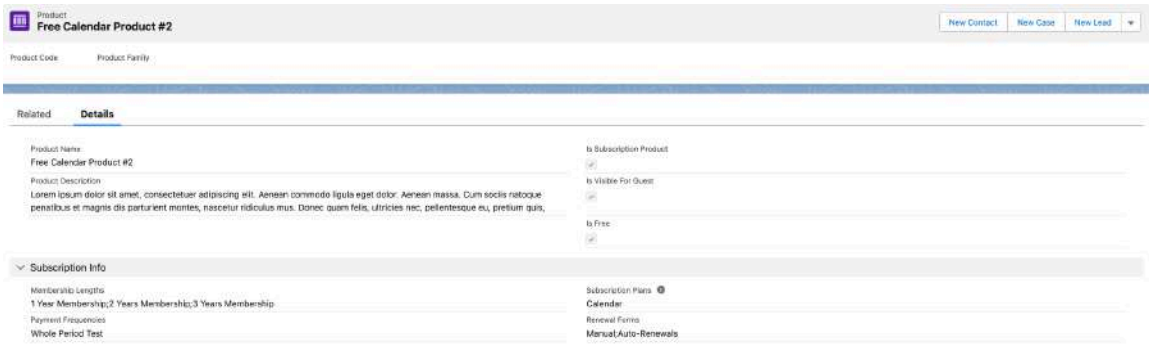
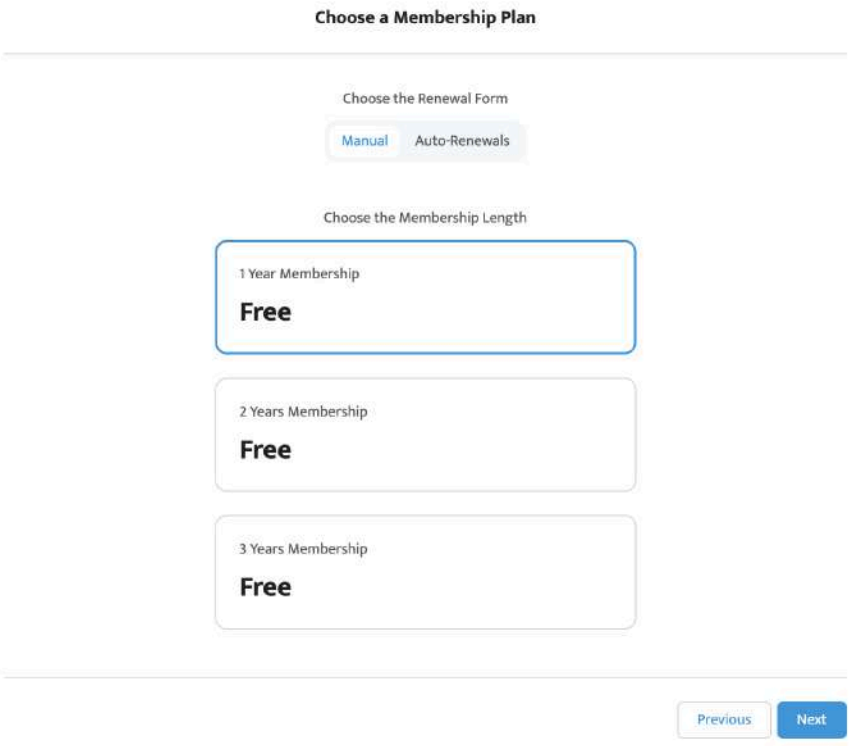


- **Internal Member Registration Wizard and Site Member Registration Flows:**
    - In the [Membership Plan] component, the “Choose the Payment Form”, “Choose the Payment Frequency” and “Choose the Payment Method” options are hidden, while “Choose the Renewal Form” and “Choose the Membership Length” remain visible.

      The price and frequency fields will display “Free”.



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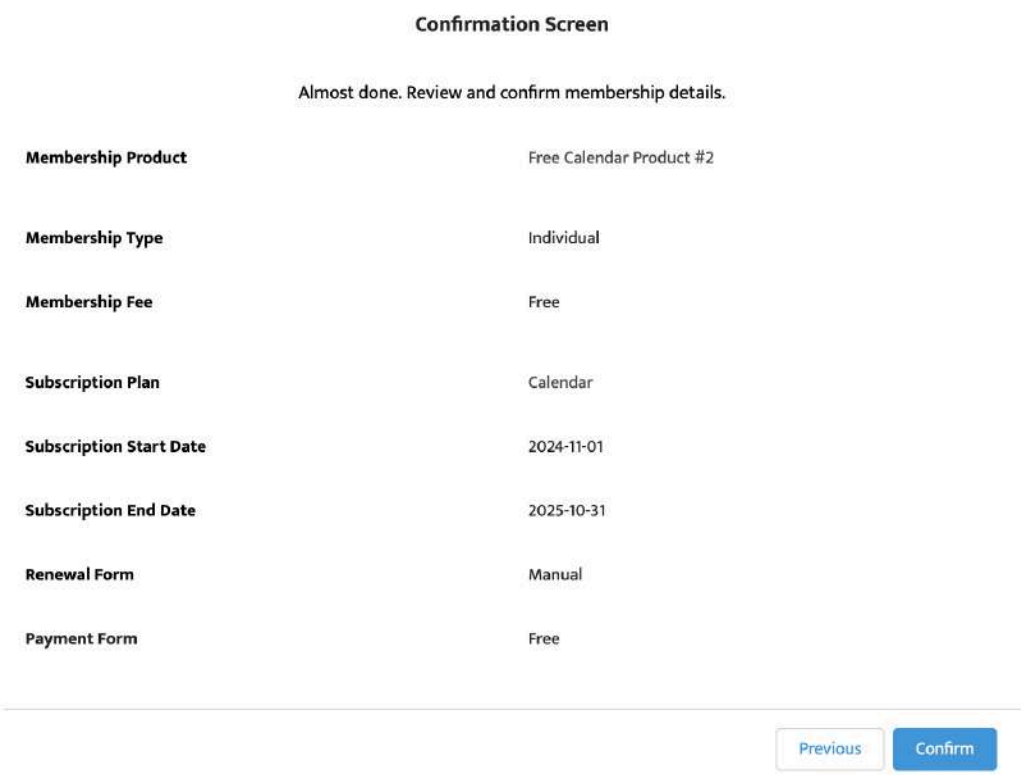
- On the confirmation screen:
  - Membership Fee displays “Free”.
  - Payment Form displays “Free”.
  - The “Remaining Days Until Payment Due” and “Grace Period” fields and any associated messages are hidden.



- The success screen excludes any payment information.

- **Other details:**
  - Layout Control: Layout for Products, Membership Subscriptions, and Subscription Terms can be adjusted by record types for free memberships.

    The Grace Period and Payment Period fields must be hidden on layouts for free memberships.

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- Member Status: Free subscriptions are always “Active”, but can expire or be canceled.
- Membership Duration Logic:
  For subscriptions created in the past: From Start Date till End Date
  For current active subscriptions that are not ended yet: From Start Date till Today
- Price Books are not required for free memberships.
- Renewal Process follows the same steps as the registration process for free subscriptions.
- Subscription Term object’s Payment Form field: A new “Free” value is available in the “Payment Form” picklist for free memberships.
- The following fields are hidden on the Membership Details/Membership Manager components for free subscriptions: Next Billing Date, Grace Period, Instalment Payment Period, Membership Fee.
- Free membership product scenario includes the functionality for creating a user when purchasing a membership (same behaviour as for paid membership subscription).
- Community users can edit free membership subscriptions via the Membership Details or Membership Manager components.

  Only the Renewal Form is editable; changes to the Payment Form are restricted.
- When integration with AC Unified Checkout is enabled in MemberSmart Settings, the Order Item for free subscriptions will be closed automatically after the order is created.

Trial Period

The Trial Period feature allows you to offer a free trial phase for selected membership products. When enabled for a product, new users can explore membership benefits without immediate financial commitment. Trial subscriptions are fully configurable, time-bound, and designed to seamlessly transition into paid memberships.

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Key Capabilities

Flexible Setup: Admins can enable or disable trial availability for individual products and configure trial duration (e.g., 7, 14, or 30 days).

One-Time Use Per Product: Each user can receive a trial only once per product, preventing repeated free access.

No Trial on Renewal: Trial periods are assigned only to first-time subscribers and are never applied during membership renewals.

Auto-Conversion to Paid: Once a trial ends, it automatically converts into a paid subscription based on pre-configured pricing and payment settings.

No Charges During Trial: Users are not charged during the trial period unless the trial is converted to a paid term.

Early Cancellation Option: Users may cancel their trial at any time before the trial ends, ensuring they are not transitioned into a paid term.

Automated Notifications: The system sends reminders shortly before a trial ends, helping users make informed decisions about continuing.

Visibility for Admins: Admins can track start and end dates of trial periods on the subscription record to monitor usage and timelines.

This feature is supported only when integration with AC Checkout is enabled and is available to both guest and logged-in users through the Member Registration component.

Enabling Trial Subscriptions Functionality

To enable trials for a membership product:

- Navigate to the Product record in the internal org.
- Set the *Is Trial Accessible* checkbox to TRUE.
- Specify the default number of days for the trial in the *Default Trial Period* field. This will be used as the default duration for trial terms linked to this product.

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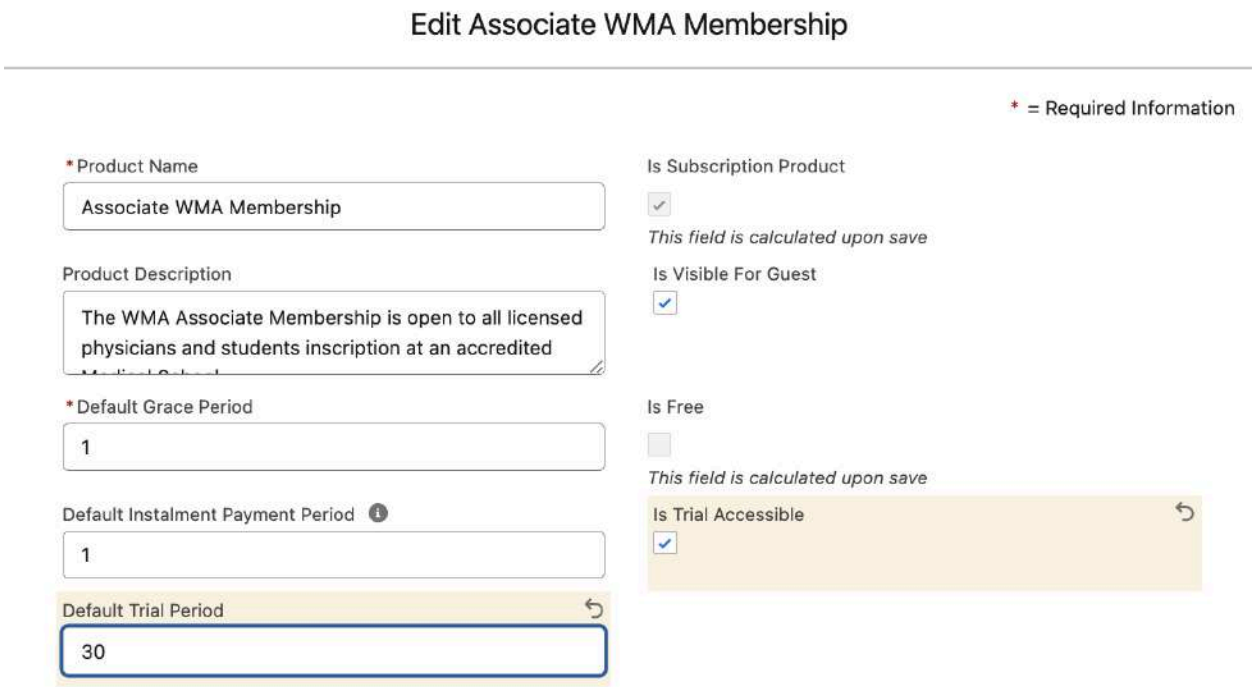

This membership is now enabled for trials, which means a trial period can be activated by a user on the site. If needed, admins can create trial records manually from the internal environment.

Note:

- Trial periods can only be configured per product.
- Trial functionality is only supported when AC Checkout integration is enabled.
- Trials are not available for free subscriptions or renewals.

Internal Admin View and Behavior

The trial period is linked to the Membership Subscription record through a lookup field and is also represented by a separate Trial Membership Subscription Term record. This record stores all key details related to the trial – such as duration, dates, and status – as well as configuration data for the next (paid) subscription term to be created once the trial ends.

The flow is as follows: when a site user starts a trial from the Experience Cloud site, a Membership Subscription record is created in the internal environment as usual, and a corresponding *Trial* Membership Subscription Term is generated and linked to it.

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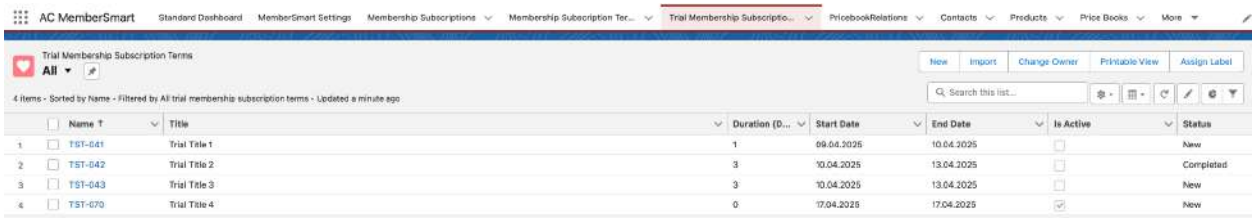
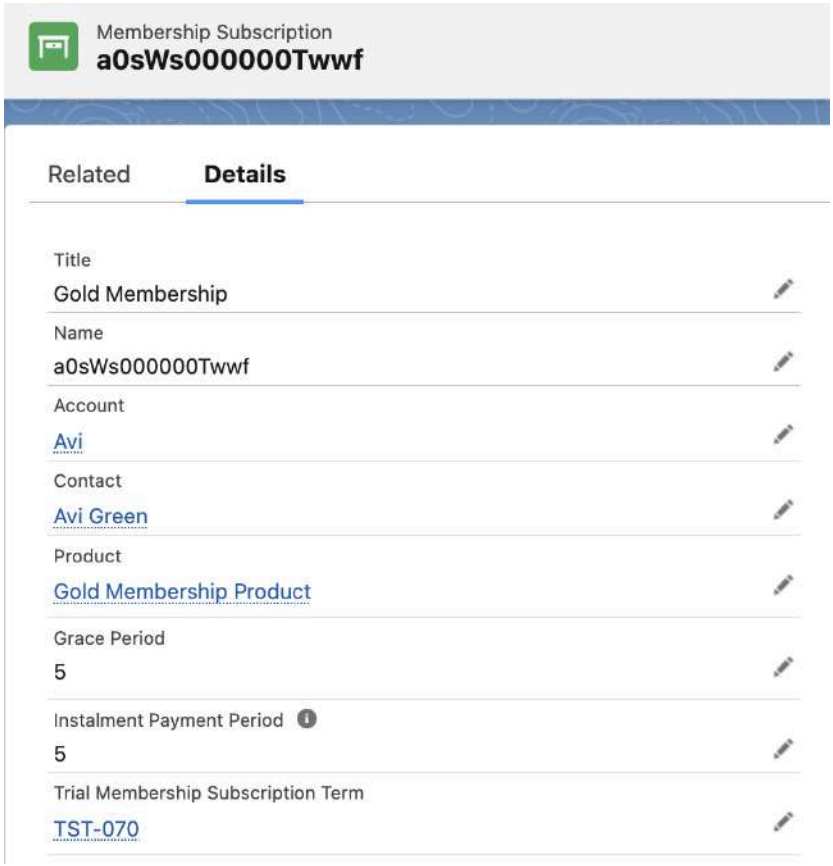
Once the trial is paid, a standard Membership Subscription Term is created using the data from the Next Term Setup field, and the subscription continues according to the regular paid subscription logic.

To view a **full list** of all trial period terms, go to the Trial Membership Subscription Term tab.



To check the details of a **specific user's trial**, open their Contact record, navigate to the Related tab, and review the linked Membership Subscription. From there, you'll find a lookup to the associated Trial Membership Subscription Term.



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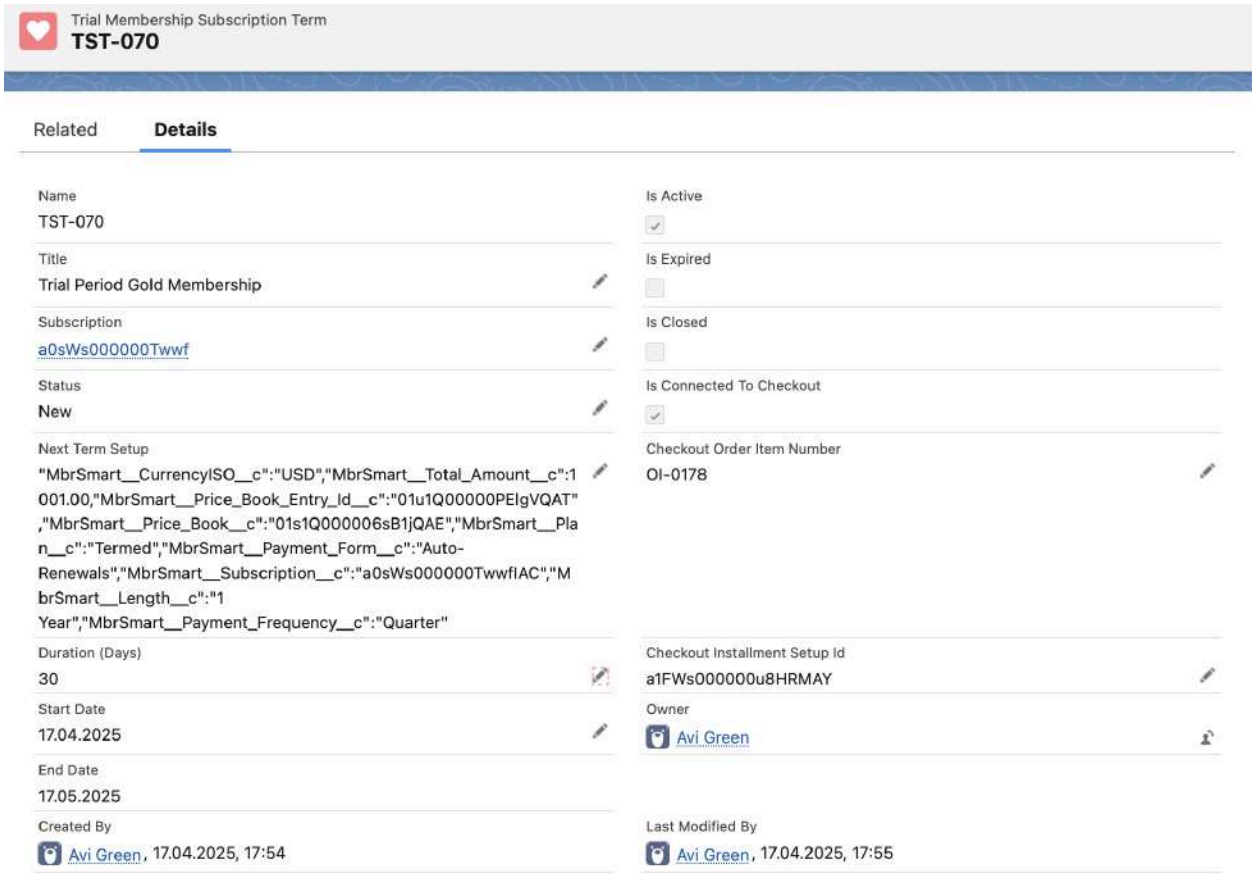
Navigate to the Related tab to view the trial term record, or simply click the field value to open the trial term.



Fields:

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- Name
    - Auto-generated name of the trial term in the format TST-###. Populated automatically when the record is created.
- Title
    - Descriptive name of the trial membership term. Populated automatically based on Subscription name + Start Date + End Date, but can be updated manually. Limited to 255 characters.
- Subscription
    - Lookup field linking the trial term to the related Subscription record.
- Duration (Days)
    - Defines how many days the trial lasts. Can be set manually or, if left blank, is auto-populated from the related Product's "Default Trial Period" field.
- Start Date
    - The start of the trial term. If not set manually, it defaults to the day the record is created (TODAY).
- End Date
    - Calculated automatically based on the Start Date + Duration (Days).
- Status
    - Indicates the current state of the trial term.
      Default is *New*, and status may change automatically during the lifecycle:
        - *New* – Default value upon creation.
        - *In Progress* – Indicates the trial is in payment processing (via renewal scheduler or manual purchase).
        - *Failed* – Payment failed during checkout.
        - *Completed* – Payment succeeded and trial ended. Triggers:
            - Creation of a new paid term (based on Next Term Setup).
            - First Installment record with status "Closed Collected".
            - Sending of "Trial Period Completed" notification.
        - *Cancelled* – Trial canceled, no further actions allowed. Triggered by cancellation scheduler.
- Is Closed
    - Formula checkbox. TRUE if Status = Completed or Cancelled. Indicates that the record is locked and cannot be edited.
- Is Expired
    - Formula checkbox. TRUE if End Date is earlier than today. Automatically calculated.
- Is Connected to Checkout

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    - Indicates if the trial term is synced with the Checkout app. TRUE if Checkout Installment Setup Id and Checkout Order Item Number are both populated.
- Is Active
    - Formula checkbox. Indicates whether the trial is currently running. Returns TRUE when:
        - Status ≠ Completed or Cancelled,
        - Today falls within the Start Date – End Date range,
        - Related subscription is not cancelled.
- Checkout Installment Setup Id
    - Stores the ID of the installment setup created in the Checkout package. Populated automatically during cart add or express checkout.
- Checkout Order Item Number
    - Stores the Order Item Number created in Checkout. Populated similarly during cart add or express checkout process.
- Next Term Setup
    - Long Text field in JSON format, describing how the next (paid) subscription term should be configured after trial ends. This data is used automatically to create the new term when the trial is completed. Includes values such as:
        - Length (e.g., 1 Year)
        - Payment Frequency (e.g., Quarterly)
        - Payment Form
        - Plan
        - Price Book & Price Book Entry ID
        - Total Amount
        - Currency ISO

Automated Background Jobs (Schedulers)

The system uses scheduled jobs to automate key parts of the trial subscription lifecycle. These background jobs reduce the need for manual intervention and ensure that trials are managed consistently.

- *TrialMembershipsUpgraderScheduler*
  Runs daily at 03:00 AM and 11:00 PM.
  Converts completed trial terms into paid subscription terms. Executes the automatic payment process if a valid payment method is available.

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- *TrialMembershipsCancellationScheduler*
  Runs daily at 12:00 AM.
  Cancels trial subscriptions that have expired without successful payment.
  Ensures the subscription is deactivated and the trial is marked as “Cancelled.”
- *TrialMembershipsEndingReminderScheduler*
  Runs daily at 08:00 AM.
  Sends a reminder email 1 day before the trial ends, notifying the user of the upcoming transition to a paid subscription.

Automatic Payment Processing

In addition to manual payments via the Membership Manager component (the flow is described here: Site View), the system supports automatic conversion of trials to paid memberships through scheduled logic.

The *TrialMembershipsUpgraderScheduler* is responsible for this automatic process. If the user has not canceled their trial and a valid payment method was saved during the registration or trial flow, the scheduler performs the following actions:

- **Checks Eligibility**
  Trial Status is not “In Progress”
  Trial is not expired
  Trial is not manually canceled

- **Updates Trial Status**
  Changes the Trial Term status to In Progress to indicate the start of the conversion process.

- **Creates Paid Subscription Term**
  Uses the data stored in the Next Term Setup field (length, frequency, payment form, pricing, currency, etc.) to create a new Membership Subscription Term.

- **Collects First Instalment**
  Creates the first Instalment for the new term and marks it as Closed Collected, meaning payment has been successfully processed.

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- **Updates Parent Subscription**
  The related Membership Subscription gets its Trial Status updated to Completed.

- **Sends Confirmation Email**
  An email ("**Trial Period Completed**") is sent to the user confirming their transition to full membership.

Automatic Cancellation Processing

Trial subscriptions that are not paid by the end of the trial period are automatically cancelled unless payment is successfully processed. This logic is handled by the *TrialMembershipsCancellationScheduler*:

- Runs daily and checks for trials where:
  Status is not In Progress
  End Date < Today
  Trial Status = Active

If these conditions are met, the scheduler:

- Updates the Trial Term Status to Cancelled
- Updates the related Subscription's IsCancelled field to TRUE
- Prevents any future actions on the trial

Manual cancellation by the user is also supported through the *Cancel* button in the *Membership Details (Manager)* components, as described in the Site View section.

Reporting

The following built-in reports help track the performance and outcomes of trial subscriptions. All reports can be filtered by Conversion Date or a specific time range, allowing admins to analyze trial activity over a selected period.

Converted Trial Subscriptions

Displays the number of members who converted from a trial subscription to a basic (paid) subscription.

Included Fields:

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- Contact: Full Name
- Trial Start Date
- Trial End Date
- Conversion Date

A total count of converted members is displayed at the bottom of the report.

Expired or Cancelled Trial Subscriptions

Shows the number of members whose trial ended without conversion. This includes members whose trial term was either Cancelled or Expired.

Included Fields:

- Contact: Full Name
- Trial Start Date
- Trial End Date
- Trial Term Status (e.g., Cancelled, Expired)

Trial Subscriptions by Conversion

Provides an overview of all trial subscriptions purchased within a selected period, grouped by conversion status (Converted vs. Not Converted).

Included Fields:

- Contact: Full Name
- Trial Start Date
- Trial End Date
- Conversion Date
- Trial Term Status

This report is useful for evaluating conversion rates and identifying trends based on trial start periods.

Site View and Behavior

From the site (Experience Cloud), trial periods can be activated by both community users and guest users using the Membership Manager or Member Registration

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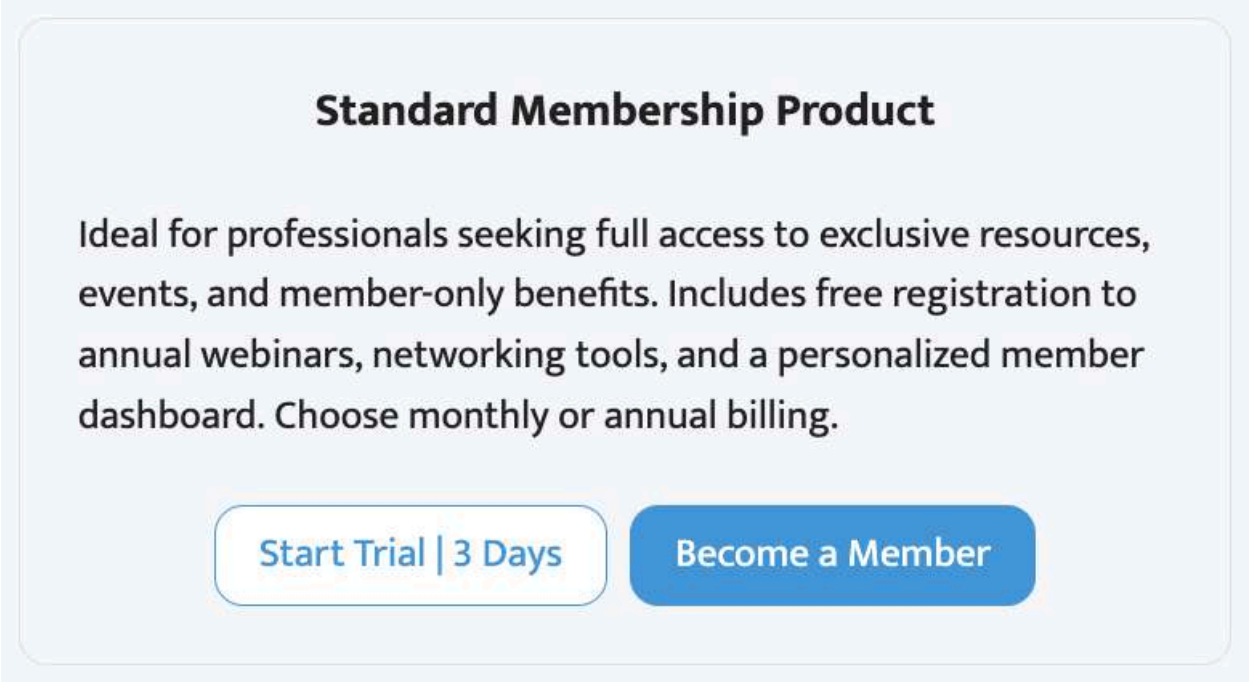
component. This functionality allows users to access a product on a trial basis before committing to a full paid membership.

When a user initiates a trial, the system creates a Membership Subscription and a linked Trial Membership Subscription Term, following the configured rules and restrictions set up in the internal environment.

Trial Activation Process

To activate a trial, users navigate to the **Member Registration** component and click the Start Trial button. The button is displayed only if:

- Trial is enabled for the product.
- The user has not already received a trial for that product.
- The user or their account has no active subscription to the same product.



The registration flow follows the standard process but includes adjustments specific to trial logic.

The **Membership Plan** component includes a message explaining that the selected options will be applied to the paid subscription that begins after the trial period ends.

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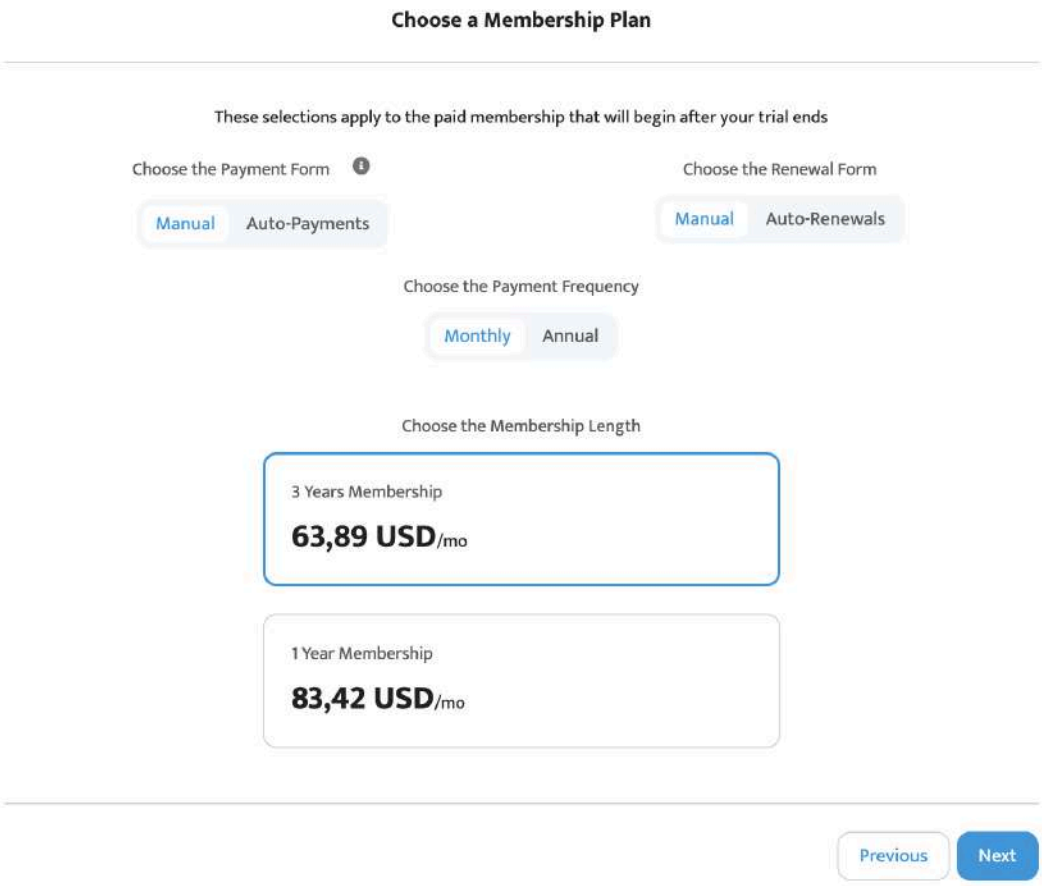

The **Confirmation screen** displays details that reflect both the active trial period and the settings that will be applied to the paid membership after the trial ends.

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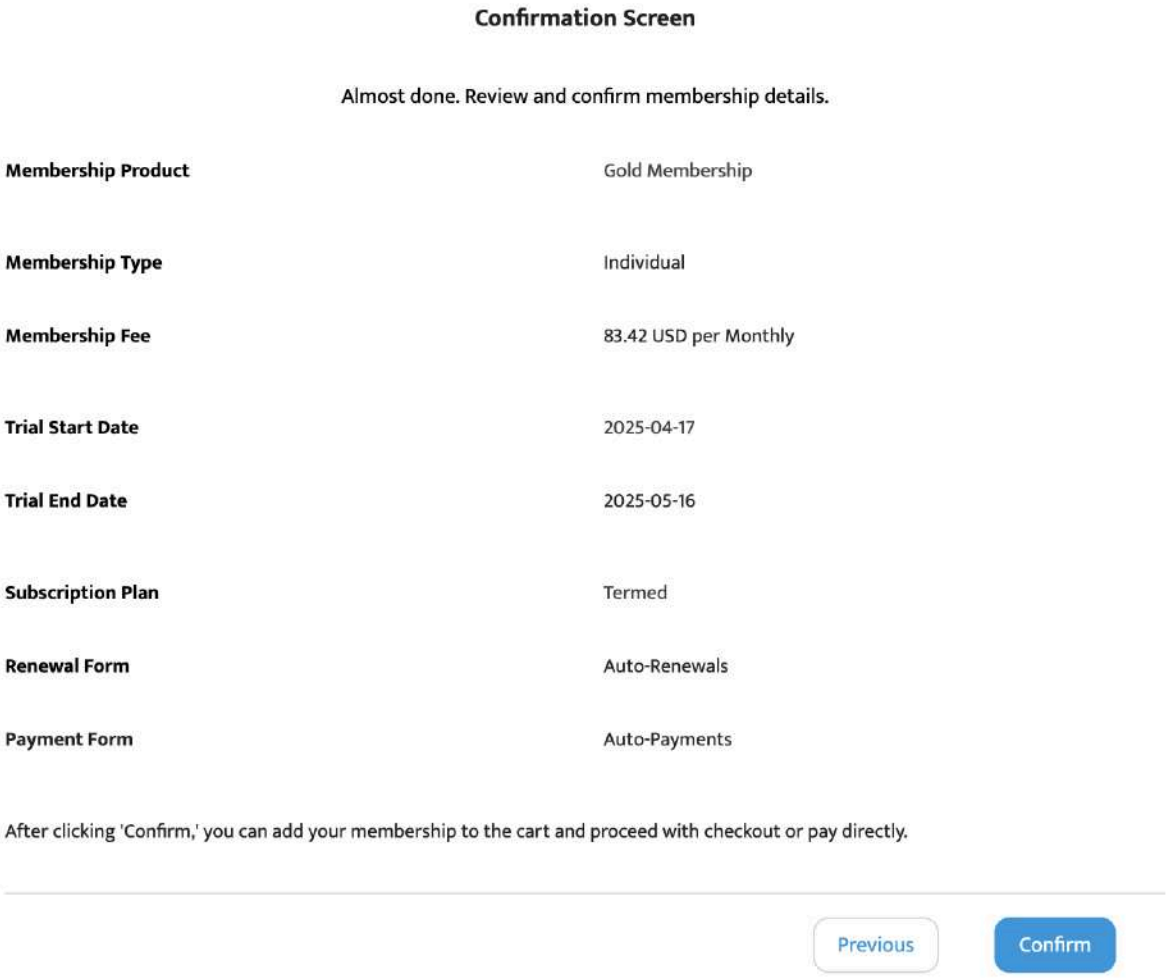

Membership Product
The name of the membership product the user selected.

Membership Type
Indicates whether the subscription is Individual or Organisational.

Membership Fee
The price that will apply to the paid membership after the trial period (displayed with billing frequency).

Trial Start Date
The date the trial period begins.

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Trial End Date
The date the trial period ends. After this, the paid subscription will activate automatically unless canceled.

Subscription Plan
Indicates whether the plan is termed or calendar.

Renewal Form
Shows the selected renewal type (Manual or Auto-Renewals).

Payment Form
Shows the selected payment method (Manual or Auto-Payments).

The next screen displays the **action buttons** – such as ‘Activate’ or ‘Add to Cart’, allowing the user to complete registration.

The ‘Add to Cart’ button adds the subscription to the shopping cart, allowing the user to complete the process later through checkout.

The ‘Activate’ button leads to the next step where the user can save a payment method, which will be used to convert the trial to a paid subscription when it ends – or earlier, if the user decides to pay before the trial period expires.

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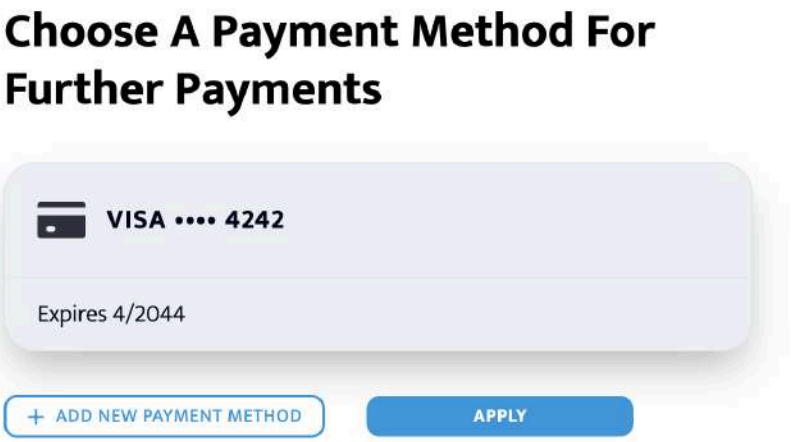
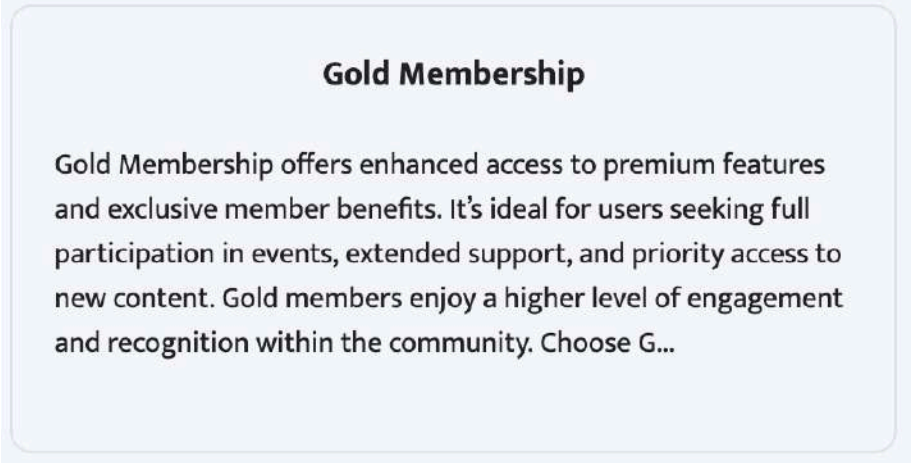


Once the payment method is successfully saved, the user is taken to a confirmation screen indicating that the trial has been activated.

Once a user has an active trial, the ‘Become a Member’ and ‘Start Trial’ buttons are no longer displayed on the Member Registration component.



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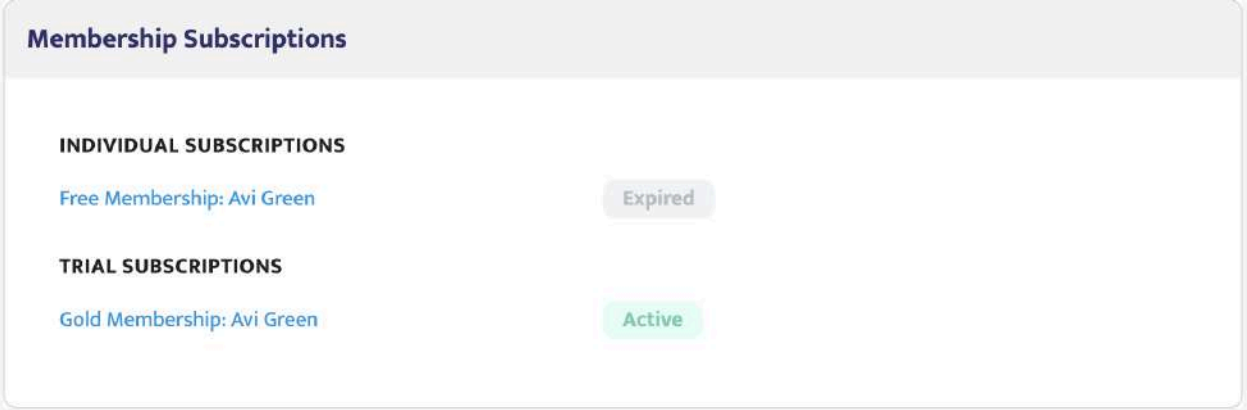
Trial Management

On the **Membership Subscriptions** component, trial memberships are clearly distinguished from other subscription types, allowing users to easily view their current trial status.



A welcome email is automatically sent to the user when the trial term becomes active.

By clicking the link, users are redirected to the **Membership Details** (Membership Manager) component, where they can view and manage their trial subscriptions.

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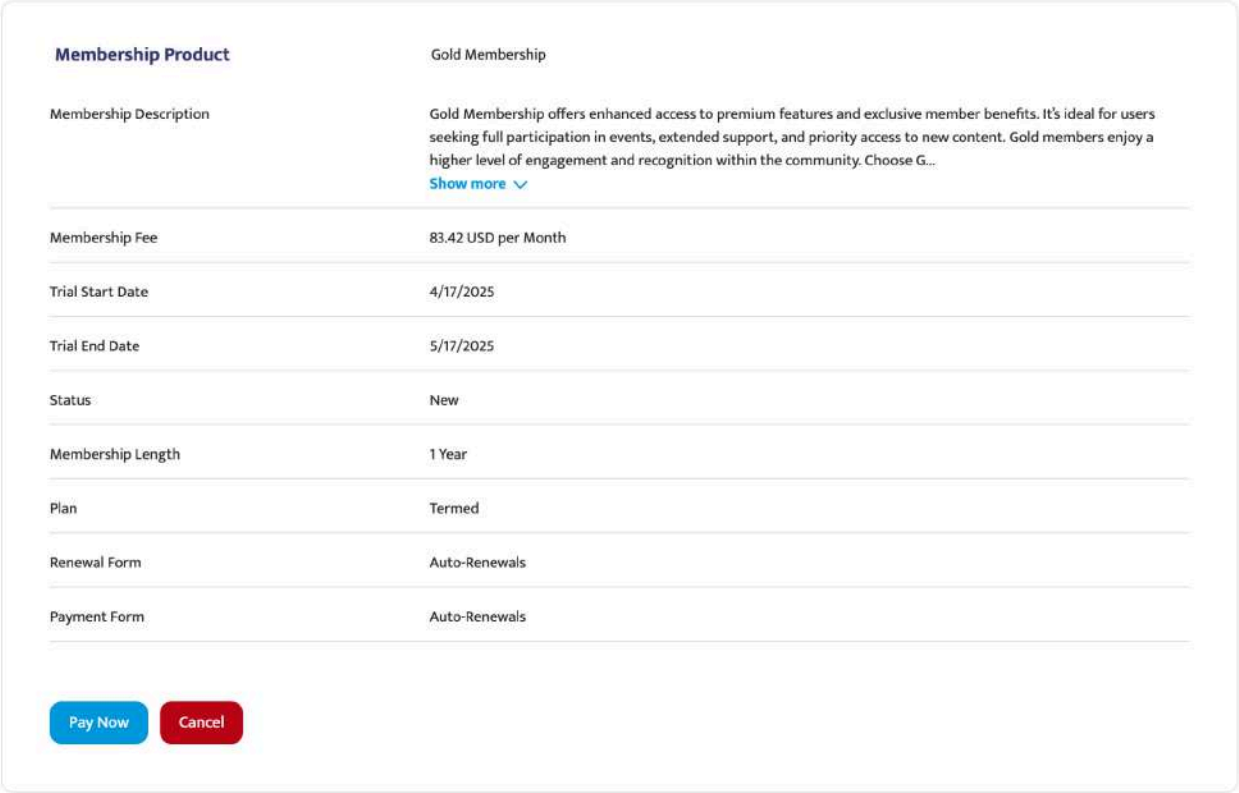

Membership Product
The name of the membership product the user selected.

Membership Description
The description of the membership product the user selected.

Membership Fee
The price that will apply to the paid membership after the trial period (displayed with billing frequency).

Trial Start Date
The date the trial period begins.

Trial End Date
The date the trial period ends. After this, the paid subscription will activate automatically unless canceled.

Status
Indicates the current state of the trial subscription. Possible values include Active,

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Completed, Cancelled, or Failed, depending on whether the user is currently in a trial, has ended it successfully, canceled it, or experienced a payment failure.

Membership Length
Defines the total duration of the paid subscription that will follow the trial. This is based on the user's selection during registration (e.g., 1 Year, 2 Years, 3 Years).

Plan
Indicates whether the plan is termed or calendar.

Renewal Form
Shows the selected renewal type (Manual or Auto-Renewals).

Payment Form
Shows the selected payment method (Manual or Auto-Payments).

Buttons:

Pay Now

The Pay Now button initiates early payment for an active trial subscription. When clicked, it triggers the Checkout integration process and updates the status of the Trial Membership Subscription Term to In Progress. Upon successful payment (via express checkout), the system:

- Marks the trial as Completed,
- Automatically creates a new paid Membership Subscription Term using the configuration stored in the Next Term Setup field,
- Creates and immediately closes the first Instalment of the paid term (with Status = "Closed Collected"),
- Sends a Trial Period Completed notification to the user.

In addition to manual payments via the Pay Now button, the system also supports automatic conversion of trials to paid memberships. This process is described in the Internal View – Automatic Payment Processing section.

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Cancel

The Cancel button displayed in the Membership Details (Manager) component allows users to manually terminate their trial subscription before the end of the trial period.

This action is available only when all of the following conditions are met:

- The Trial Term is currently active (i.e., the current date is within the Trial Start and End dates),
- The Trial Status is not already set to Cancelled or Completed,
- The Is Closed checkbox on the Trial Subscription Term = FALSE.

When the Cancel button is clicked:

- The Trial Subscription Term Status is updated to Cancelled,
- The Membership Subscription's Trial Status is updated to Completed,
- The IsCancelled field on the subscription record is set to TRUE,
- No further actions (such as payment or upgrade) can be taken on the trial,
- The trial will no longer be eligible for automatic conversion into a paid subscription.

This logic aligns with the internal scheduler TrialMembershipsCancellationScheduler, which performs the same cancellation process automatically if the trial expires without successful payment (see the Internal View – Automatic Cancellation Processing section). The Cancel button offers users an option to cancel preemptively.

Once a trial is canceled, it cannot be reactivated, and the user will not be eligible for another trial of the same product.

Note: The system does not provide a built-in Salesforce Lightning Flow for trial cancellations. Admins must create a custom Flow tailored to their organization's cancellation policies and logic, and then assign its API name to the Cancel Subscription Flow API Name property on the component.

This design allows flexibility while ensuring the trial cancellation process is properly handled within the organization's operational requirements.

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Configure Custom Subscription Length and Payment Frequency

To incorporate a new Custom Period option into the Subscription Lengths logic, follow these steps:

- Add the new period to the Subscription Length global picklist (globalValueSets). By default, the picklist includes options like “1 Year,” “2 Years,” and “3 Years.” Include your custom period to display it when selecting Subscription’s Length during Subscription Term creation.
- If there is no existing default record of PeriodToValueMapping in the Custom Metadata Types object that meets your requirements, create a new one. To do this, place the Period Name and Value fields to the object layout and fill in the fields for the new custom period record:
    - Period Name = “YOUR_PERIOD_NAME” (e.g., “2 Months,” “Academic Year,” etc.)
    - Value = INTEGER_VALUE_IN_MONTH (e.g., for “2 Months,” the value should be 2; for “Academic Year,” it might be 9, etc.)
- Add PricebookRelation, Price Book, and Price Book Entry for the new period.

To introduce a new Custom Period option into the Subscription Payment Frequencies logic, follow these steps:

- Add the new period to the Payment Frequency global picklist (globalValueSets). By default, the picklist includes options like “Month,” “Quarter,” “Semi-Annual,” “Annual,” and “Whole Period.” Include your custom period to display it when choosing Subscription’s Payment Frequency during Subscription Term creation.
- If there is no existing default record of PeriodToValueMapping in the Custom Metadata Types object that meets your requirements, create a new one. Fill in the following fields for the new custom period record:
    - Period = “YOUR_PERIOD_NAME” (e.g., “4 Months,” “2 Years,” etc.)
    - Value = INTEGER_VALUE_IN_MONTH (e.g., for “4 Months,” the value should be 4; for “2 Years,” it might be 24, etc.)
- Add PricebookRelation, Price Book, and Price Book Entry for the new period.

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Restrictions:

- If the selected Subscription Length/Payment Frequency is not an integer number (e.g., 9 months/6 months), refrain from choosing these Payment Frequencies for the selected Length; otherwise, an exception will be thrown.
- If the Payment Frequency is greater than the Custom Length (e.g., 12 months > 9 months), avoid choosing these Payment Frequencies for the selected Length; otherwise, an exception will be thrown.

Cancellation Functionality

When a membership subscription is cancelled, several records are automatically updated to ensure data accuracy and consistency.

Membership Subscription Record:

- The Is Cancelled checkbox indicates whether a subscription is cancelled.
- When this checkbox is checked:
    - The Status field on the Membership Subscription record changes to Cancelled.
    - The Cancellation Date field is updated with the date the subscription was cancelled.
- If the Is Cancelled checkbox is cleared:
    - The Cancellation Date field is automatically cleared.
    - Important: The Cancellation Date field cannot be edited manually and is updated only through the subscription trigger.

Contact Record:

- The Member Status field is updated to Non Member if the status of the linked subscription is Cancelled.

Account Record:

- The Member Status field on the Account is updated to Non Member when the linked subscription is Cancelled.

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Instalment Records:

- All future instalments scheduled for payment are cancelled, and their Status field is updated to Cancelled.

Custom Membership Subscription Status

Admins have flexibility and control over the statuses assigned to user subscriptions with a Custom Status field on the Membership Subscription object.

Custom Status Field Details

Field Label: Custom Status

Field Type: Picklist

Available Values: Empty (default value), Active, Pending, Suspended, Canceled, Expired.

How the Custom Status Field Works

Default Behavior:

- If the Custom Status is set to Empty (default), the system will use the existing Default Status logic to determine subscription status.
- The behavior remains unchanged from the original subscription status calculation.

Custom Status Override:

- If the Custom Status is set to any value other than Empty:
    - The Default Status formula will depend on the Custom Status value.
    - Example: If the Custom Status is set to Active, the Default Status will also display Active.

Implementing Custom Logic:

- Users who wish to customize the behavior further can create their own logic for the Custom Status field. This can be achieved using:
    - Process Automations (e.g., Flows or Process Builder)
    - Triggers to define and manage specific status conditions.

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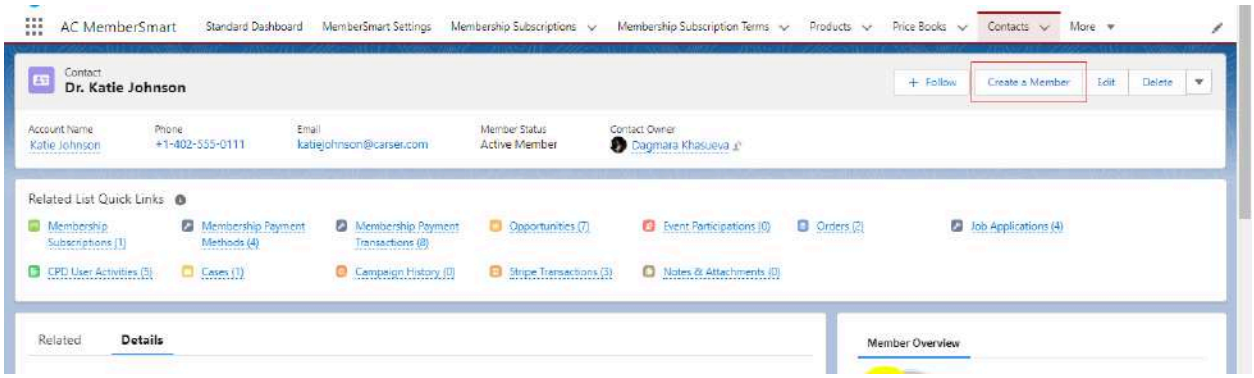
Internal Wizards For Assigning Membership Subscriptions To Users and Subscriptions Renewals

Internal Member Registration

Admin users can create membership subscriptions from the internal environment in one place.

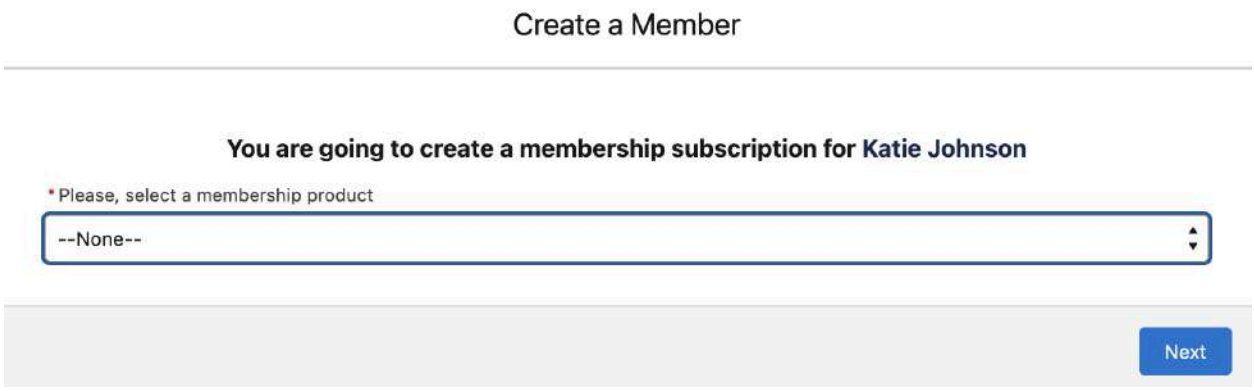
On the Contact record (or Person Account record, with additional manual steps to navigate to the Account object and create a new Action), there is a “Create a Member” button that evokes the “Member Registration” flow for creating a member internally.

Note The “Create a Member” button must be manually created to be used with Person Accounts.



Click the button and open a pop-up window.

Screen 1: Displays the new product selection screen.



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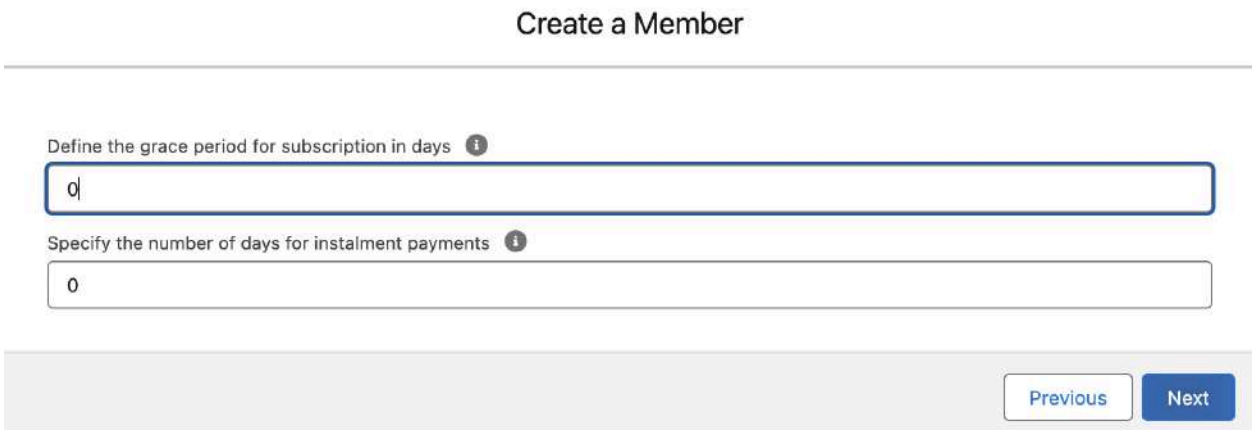
Fields:

- Please, select a membership product
Displays all the products with the Membership Subscription record type.

Screen 2: Specify the grace period and payment period.



Displayed only if a paid membership product is selected on the first screen; not displayed for free products.

- Define the grace period for subscription in days
Type in the grace period for the subscription. The data will be stored on the membership subscription record of the contact.

- Specify the number of days for instalment payments
Enter the payment period for the subscription in days, indicating the number of days members have to provide payment for each instalment.

For both fields, if the value is set to 0, the period data will pull directly from the Product object.

If the values are changed, the updated grace period and payment period will apply specifically to the Membership Subscription.

Screen 3: Company or Person screen.

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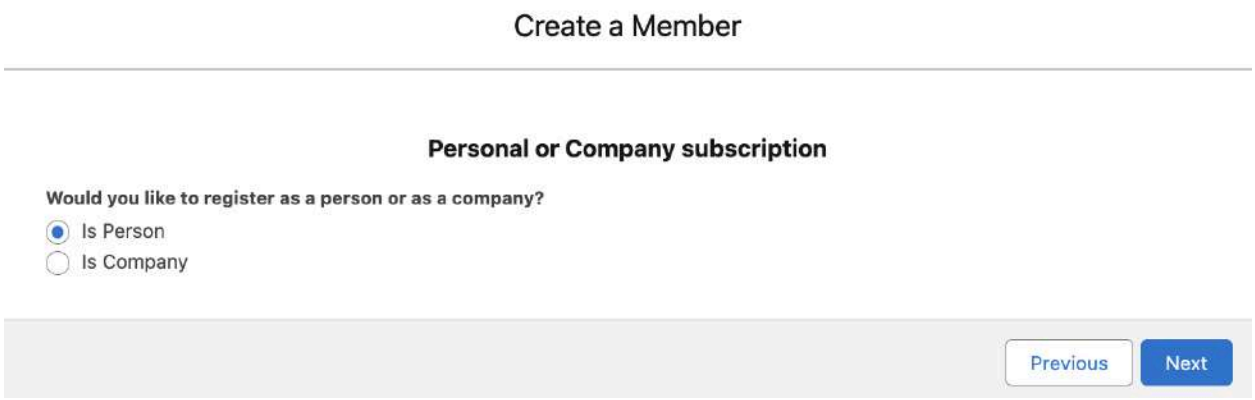
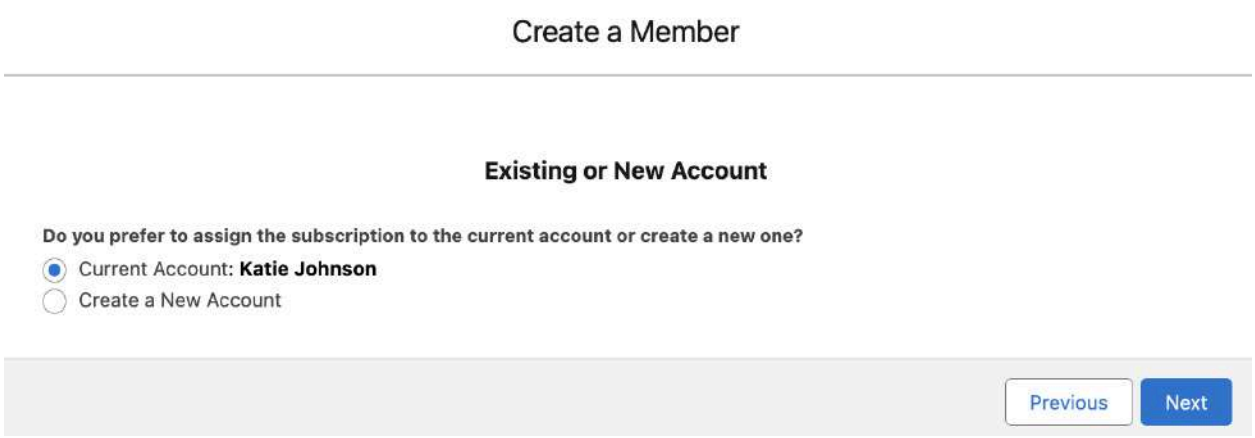


Fields:

- Would you like to register as a person or as a company?
Please select the appropriate option - individual or organisational subscription.

Screen 4: Existing or New Account.



Fields:

- Do you prefer to assign the subscription to the current account or create a new one?
Decide if there is a need to create a new account or the organisational subscription must be created for the existing account (this step is skipped for individual memberships).

Screen is displayed if you selected the “Is Company” option.

Screen 5: Create a New Account.

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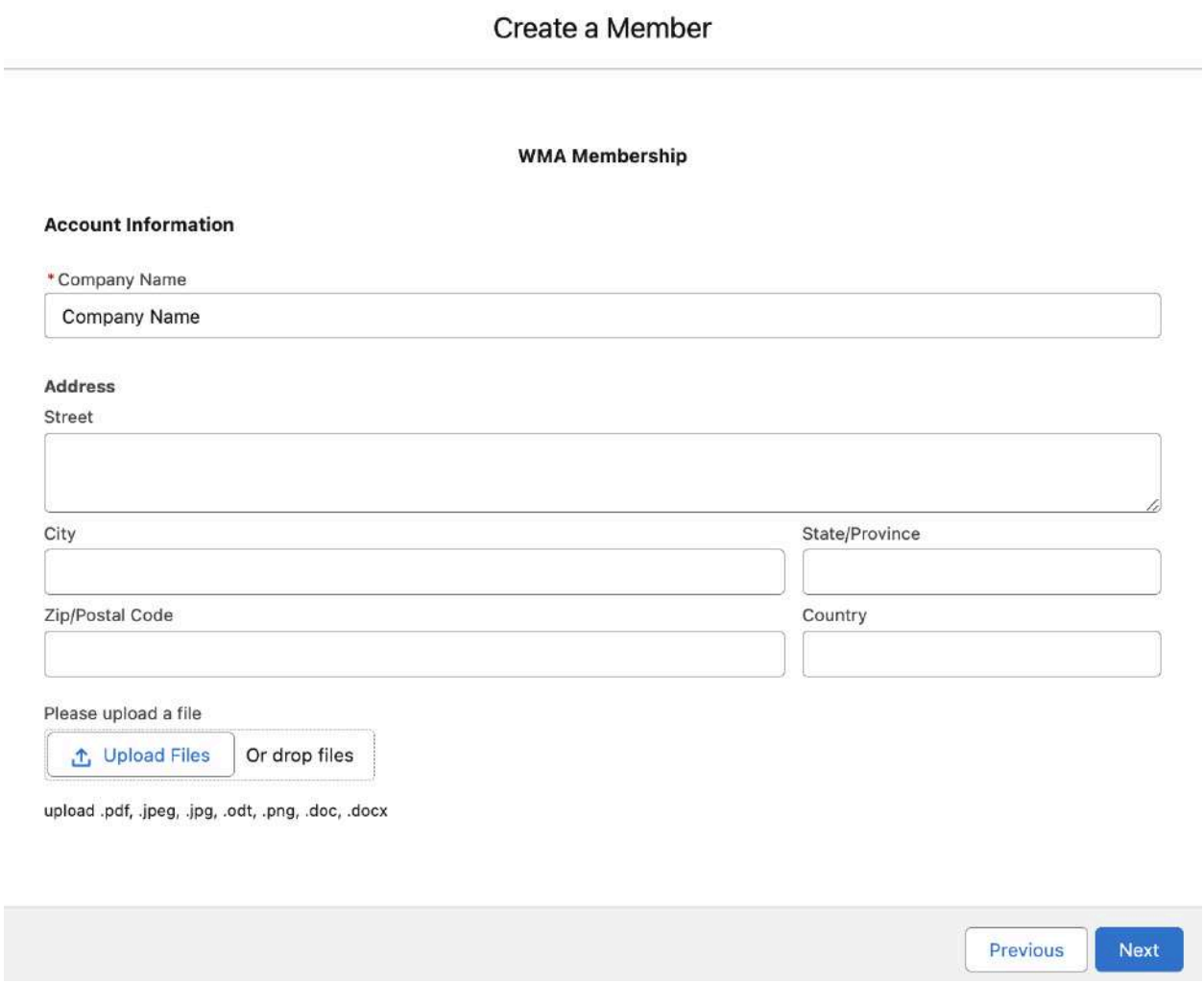

Fields:

- *Company Name*
Create the Account name

- *Address*
Fill in the address

- *Please upload a file*
Drop or upload files

Screen is displayed if you selected the “Create a New Account” option.

Screen 6: Membership Plan.

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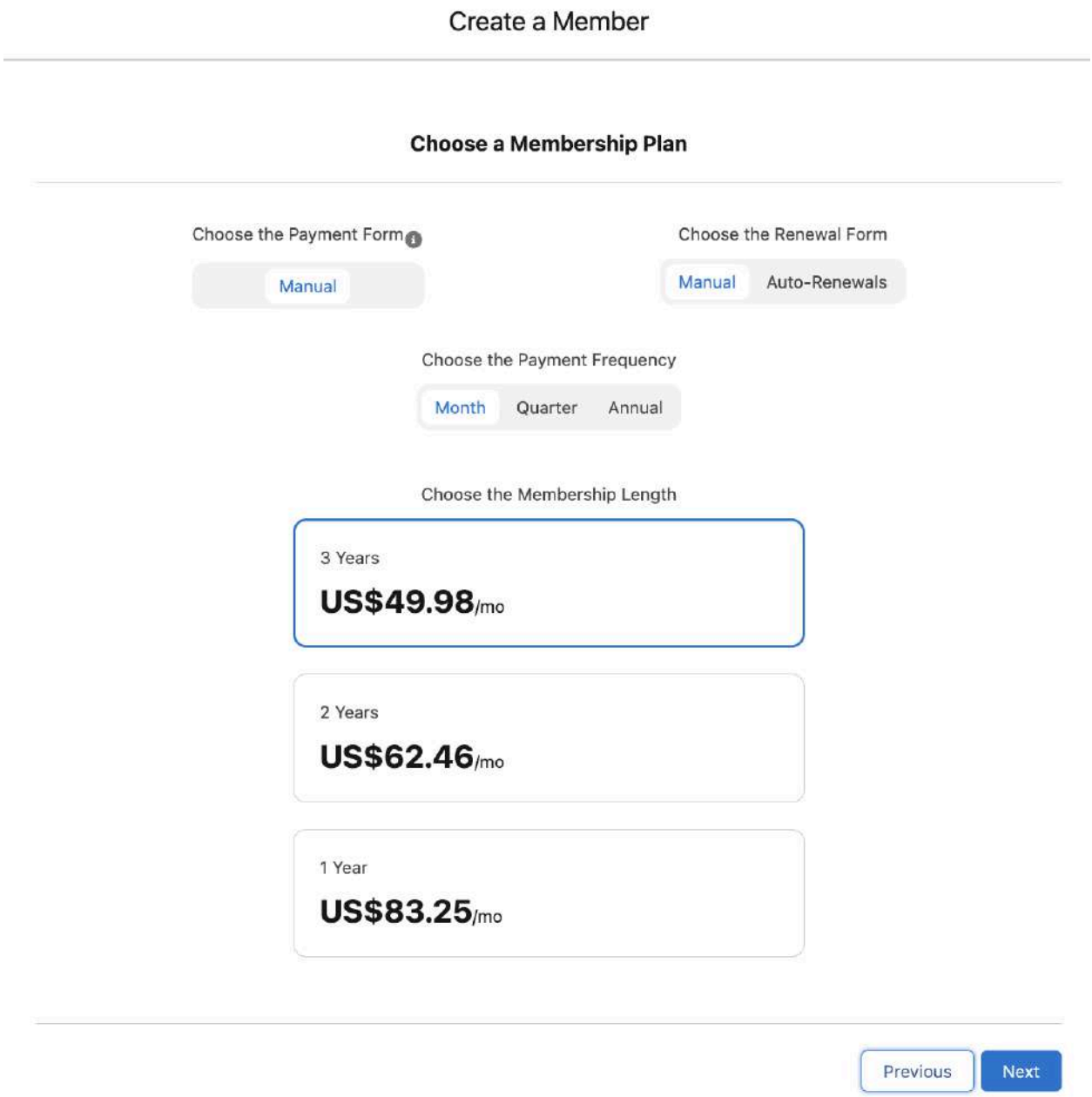

Fields:

- *Choose the Payment Form*

For internal registration, only a manual payment form by invoice is available. Settings can be changed manually from the internal environment. The section is displayed for paid subscriptions only.

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- Choose the Payment Method
Allows users to select a preferred payment type for their membership subscription. For internal registration, only the payment by invoice is available. The section is displayed for paid subscriptions only.

- Choose the Renewal Form
Select the appropriate option. The screen won't appear to a user on site when self-registering if only one value is selected on the Product object – Renewal Forms field.

- Choose the Payment Frequency
Select how frequently to pay for the membership.
The displayed values are controlled on the Product level. For free subscriptions, the section displays "Free" value instead of the price.

- Choose the Membership Length
The prices are sorted from low to high.
The displayed values are controlled on the Product level.

By default, the Membership Plan component displays values from the global picklists - Subscription Length, Subscription Renewal Form, Payment Frequency. The labels can be changed if needed.

Screen 7: Confirmation Screen.

See the summary of the made selections before finishing the subscription assignment. Records (account, contact, subscription, etc) will be created after the user clicks the Confirm button.

If native payments are used:

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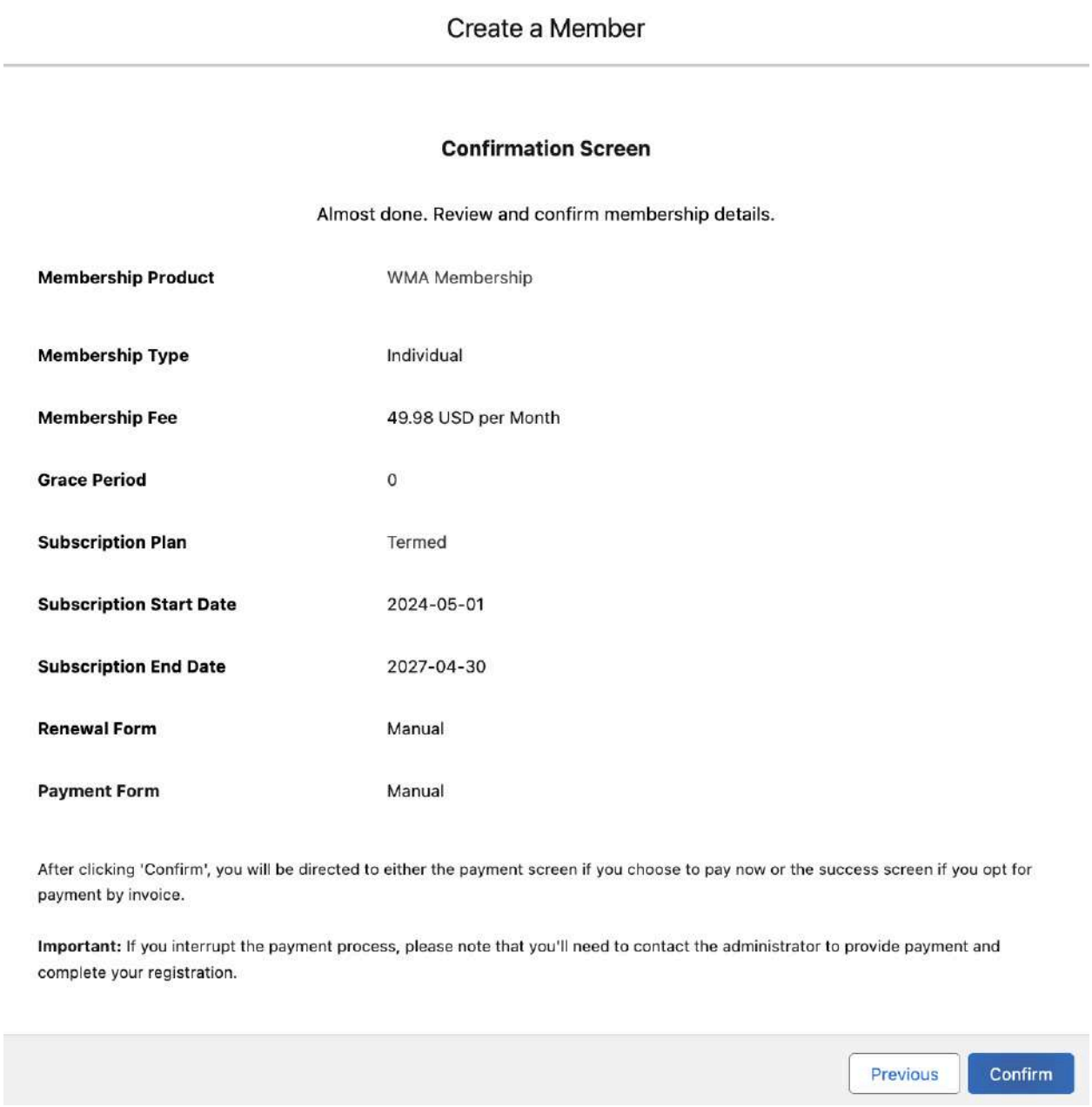

If AC Unified Checkout is enabled in settings:

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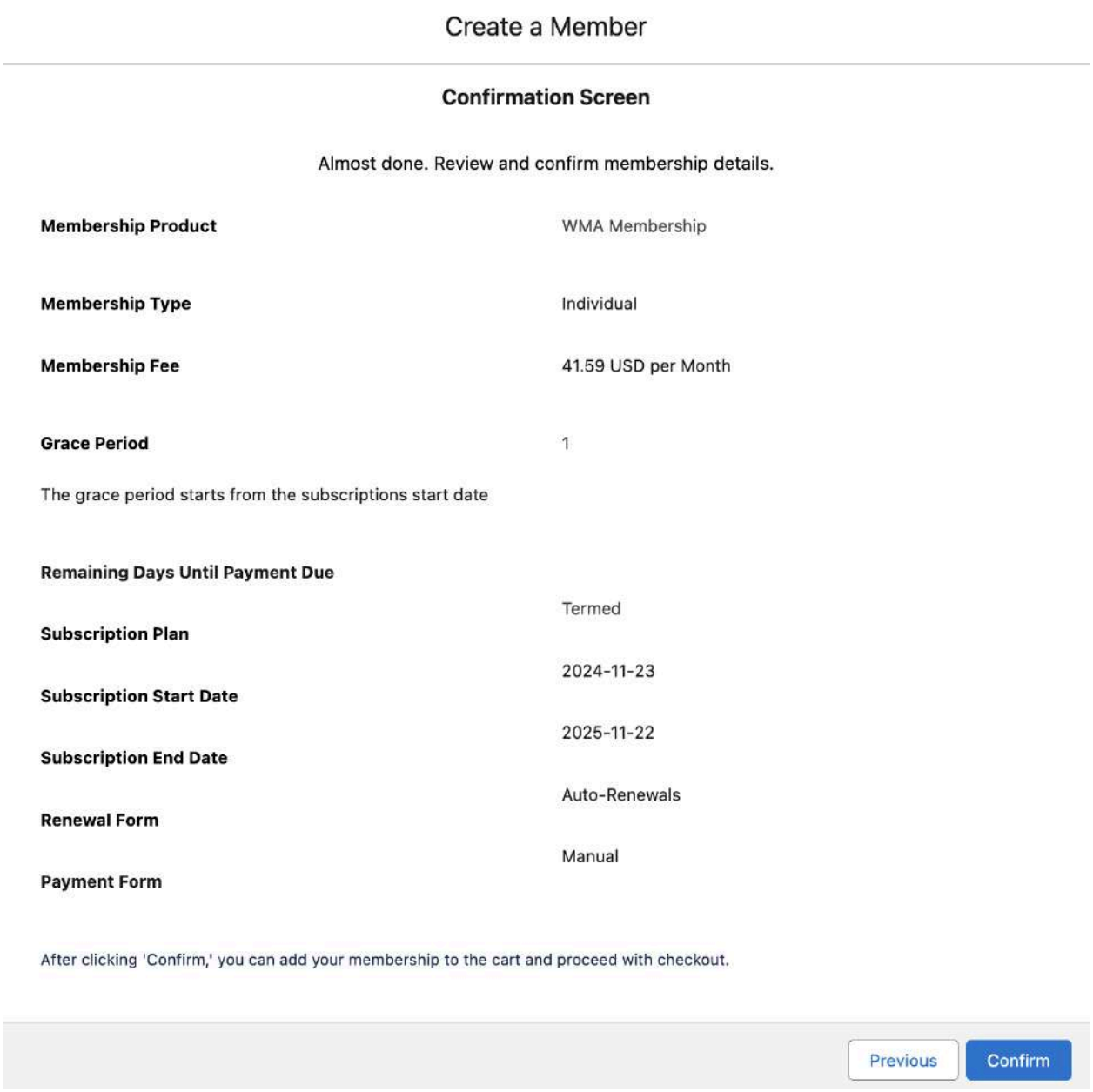

Screen 8: Add to Cart.

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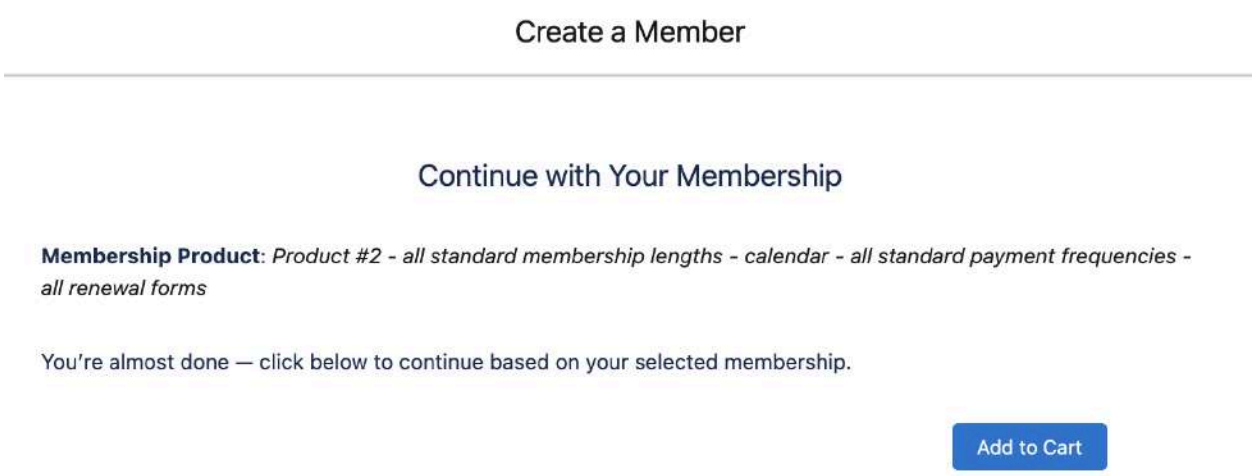
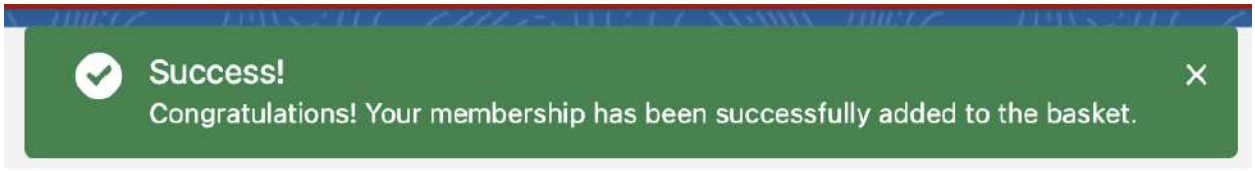


The member registration flow is integrated with the AC Unified Checkout app's functionality. Specifically, there is a component that allows adding the subscription to a cart.

The “Add to Cart” component is displayed after the Confirmation screen. The screen is displayed when the AC Unified Checkout app is installed on the org and the integration is enabled in the MemberSmart Settings.

After clicking the “Add to Cart” button, the following toast message is displayed: ”Congratulations! Your membership has been successfully added to the basket.”



Important AC Unified Checkout integration is enabled in the settings, it is important to deactivate the native Membership Request, Invoice, and Receipt email templates to prevent duplicate notifications being sent alongside the AC Checkout app's email notifications.

If AC Checkout is installed on the org, and the “Create users when self-registering with the registration flow on site” setting is enabled, users will be created only after the order is paid and closed.

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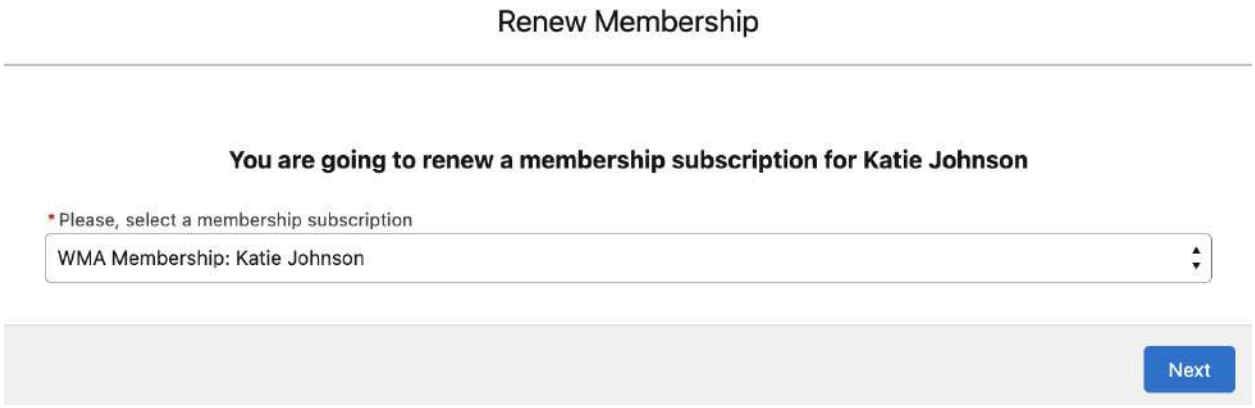
Internal Membership Renewal

Admin users can renew membership subscriptions from the internal environment in one place.

On the Contact (or Person Account) record, there is a “Renew Membership” button that evokes the “Subscription Renewal” flow.

Note The “Renew Membership” button must be manually created to be used with Person Accounts.

Screen 1: Renew Membership.



Fields:

- **Please, select a membership subscription*
Displays all the active membership subscriptions of the contact.

Screen 2: Membership Plan.

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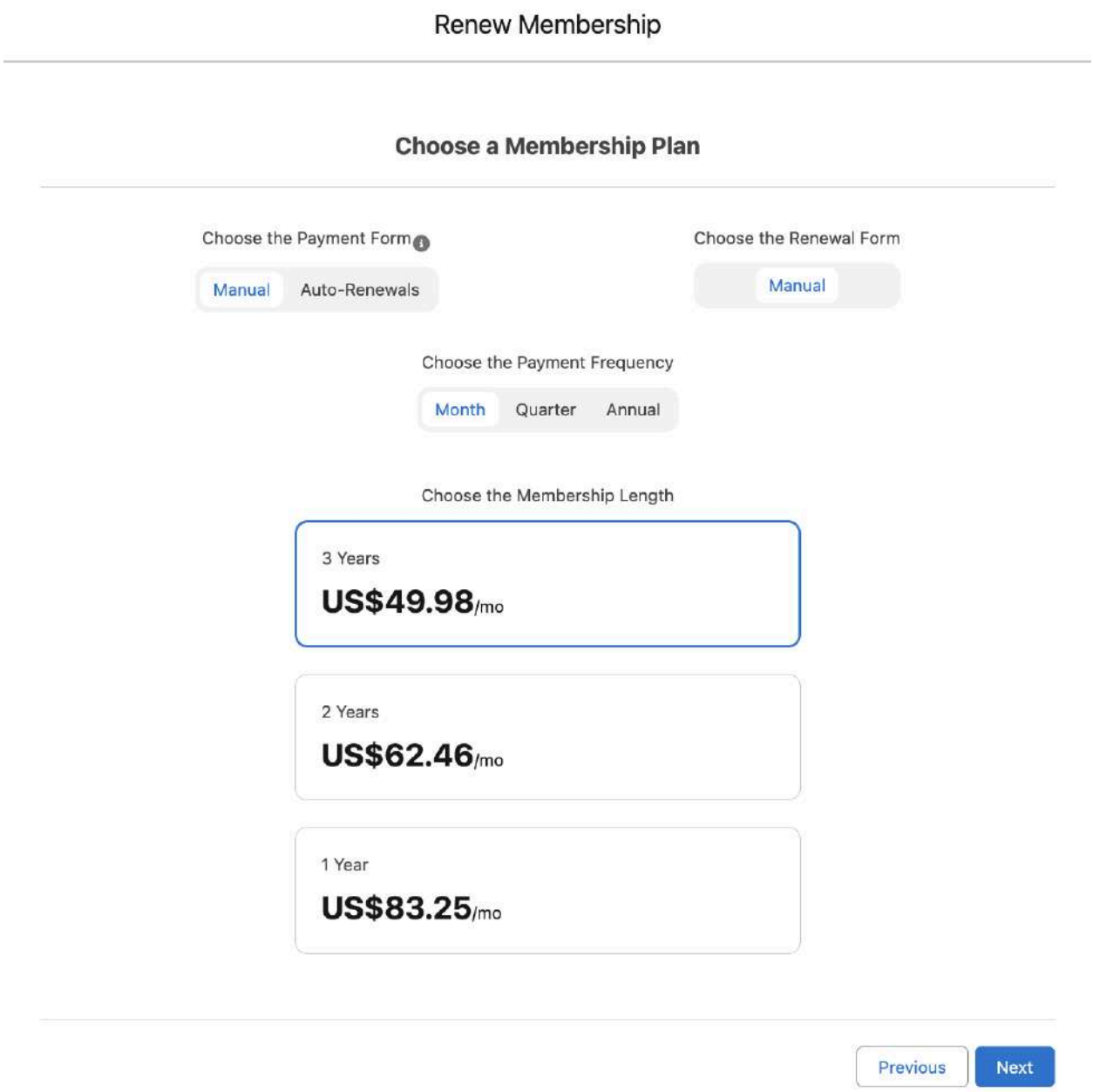

Fields:

- *Choose the Payment Form*
For internal registration, only a manual payment form by invoice is available.
Help text is displayed: "If you have selected auto-payments, a saved default payment method must be associated with the contact."

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- Choose the Renewal Form
Select the appropriate option. The screen won't appear to a user on site when self-registering if only one value is selected on the Product object – Renewal Forms field. The displayed values are controlled on the Product level.

- Choose the Payment Frequency
Select how frequently to pay for the membership.
The displayed values are controlled on the Product level.

- Choose the Membership Length
The prices are sorted from low to high.
The displayed values are controlled on the Product level.
For free subscriptions, the section displays "Free" value instead of the price.

By default, the Membership Plan component displays values from the global picklists - Subscription Length, Subscription Renewal Form, Payment Frequency. The labels can be changed if needed.

Screen 3: Success.

Congratulations, the membership subscription is successfully renewed!

Continuous Professional Development Setup

Track and manage ongoing educational activities.

Objects:

CPD Objective – the desired certification or accreditation that a user is attempting to attain. CPD Objectives are created by the administrator.

CPD Activity – educational activity taken to achieve a goal. (For example, "attended an event", "read an article").

CPD User Activity – activity logged by a user.

CPD Setup:

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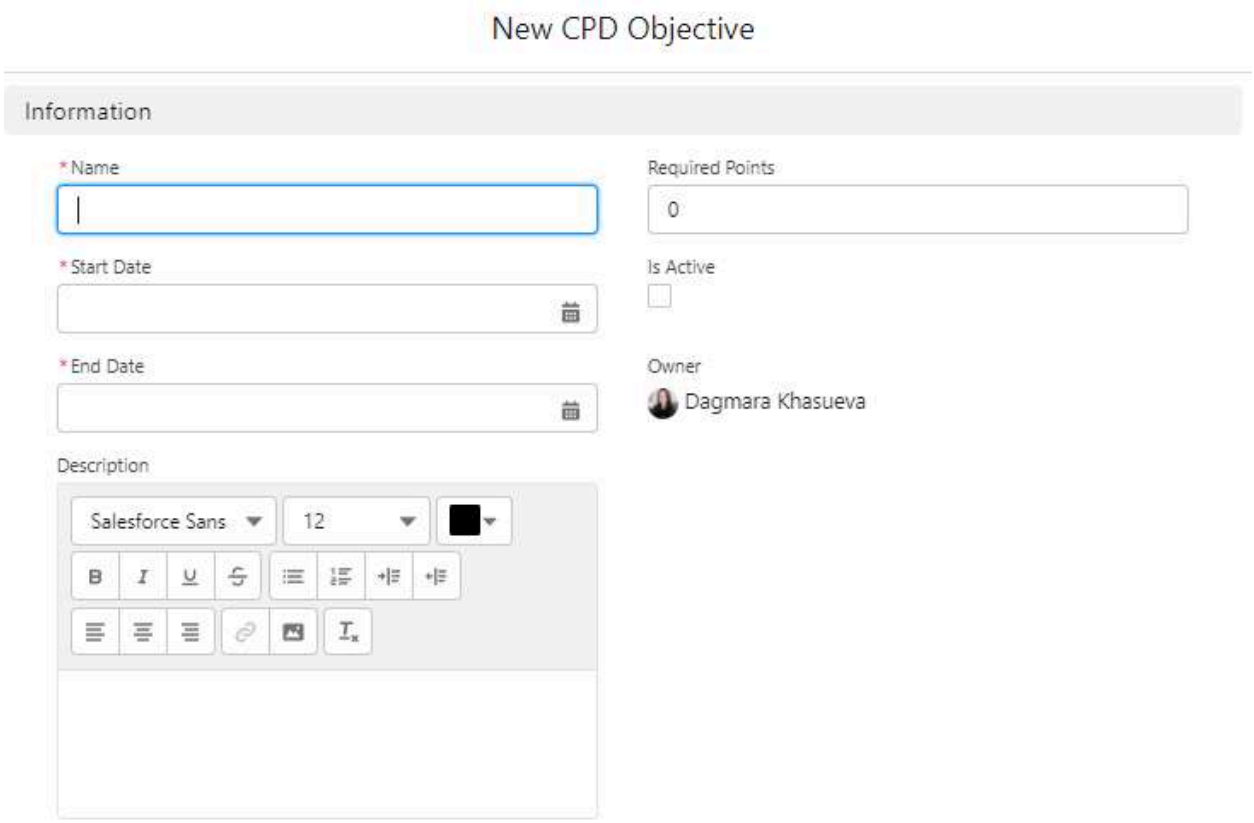
1. **Create CPD Objective**

Note Before creating a new CPD Objective, please assign the membership subscription page layout to the needed profiles through Setup - Object Manager - CPD Objective - Page Layout - Page Layout Assignment.

Go to the CPD Objectives tab and click New.



Fields to fill in:

- Name – required field
    - Type in CPD Objective name
- Start/End Dates
    - Lifecycle of the program
      You can activate your objective from the start date only
- Description

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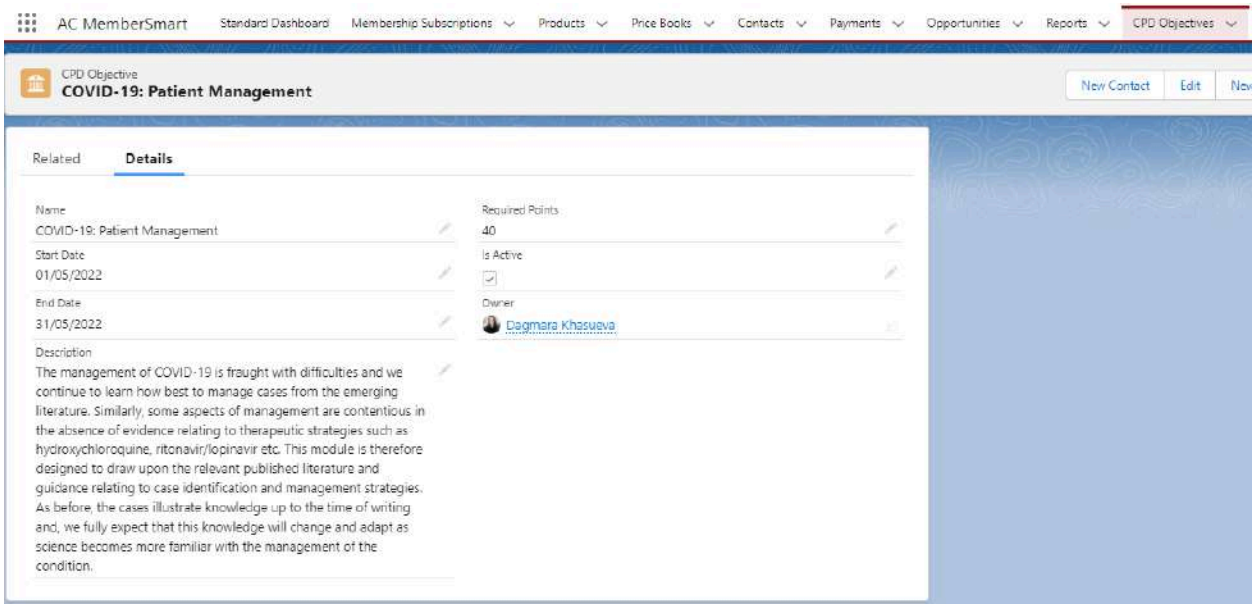
    - Type in a short description
- Required points
    - The “Required points” field will be updated automatically – points will be calculated from the “Required Points” fields on the associated CPD Activities’ records
- Is Active
    - The checkbox activates the CPD objective. The checkbox can be enabled only after you create and assign CPD activities to the objective. You cannot mark an objective as 'Active' if it has not yet started.
- Is Expired
    - When checked, it is not possible to register the CPD Activity for the selected objective (the field is checked automatically on the End Date). The user will be able to log activity only within the CPD Objective start and end dates. In the community, the 'Create User Activity' button is disabled if the 'isExpired' field on the CPD Objective is set to true.
- Save



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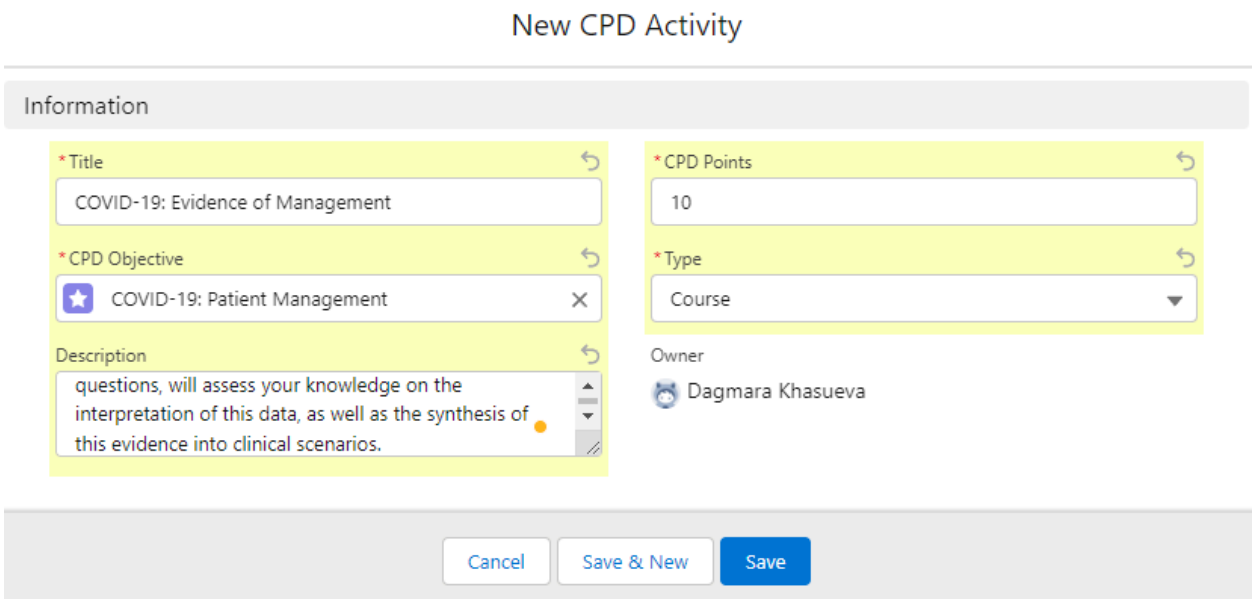
Note When deleting a CPD Objective record, the associated CPD Activities will also be deleted.

2. **Add CPD Activities**

Note Before creating a new CPD Activity, please assign the membership subscription page layout to the needed profiles through Setup - Object Manager - CPD Activity- Page Layout - Page Layout Assignment.

Go to the CPD Activities tab and click New.



Fields to fill in:

- Title – required field
    - Type in CPD Activity name
- CPD Objective – required field
    - Choose CPD Objective from the list to assign the activity
- CPD Points – required field

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    - Define the number of points a user will earn when completing the activity task

- Type – required field
    - Select CPD Activity Type from the list
- Description
    - Type in a description of the activity and click Save.

Please do not forget to go back and activate the CPD Objective.

See how to set up CPD on the Experience Cloud site here.

AC Unified Checkout Integration

AC MemberSmart is integrated with the AC Unified Checkout app, allowing a membership subscription to be added to the cart during the registration process. This enables users to complete the checkout along with other items.

This section explains how to configure the integration, highlights logic changes, and outlines new behaviors.

Configurations

To use the checkout capability, enable the integration of the AC MemberSmart and AC Checkout packages as described in MemberSmart Settings - Checkout Settings section.

Behaviour

Automatic Order Item Updates

- Upon successful payment of all installments, the Order Item Status automatically updates to “Completed.”
- If installments fail, the status remains “Pending,” and retry notifications are sent to users.
- After creating order items, subscription terms are linked using the Order Item Key fields in Salesforce.

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Unified Cart Functionality

- Add to Cart. A new “Add to Cart” button is added to the registration page, allowing users to add subscriptions to their cart directly.
- Cart Removal. When a subscription is removed from the cart:
    - All newly added subscription terms and related records are deleted.
    - If a subscription has only one term, the entire subscription is removed, including subterms.

Notifications

- Native MemberSmart notification templates must be disabled to avoid duplicate emails.

User Registration Automation

- A user is registered when the memebrship is purchased by guest user (the order is paid) if the sef-registration setting enabled in MemberSmart Settings.

Free Products

- Free products can now be added to the cart as part of membership purchases if predefined conditions are met.

Renewals

- The renewal process includes creating a new order.

Instalment Status Transitions

- New → Assigned when the instalment is created during the checkout process or subscription creation.
- In Progress → Updated immediately after clicking the Add to Cart button.
- Invoiced → Updated only when order items are created with the Invoice payment type during checkout.
- Closed Collected → Updated upon full payment of the instalment.
- Failed → Triggered if a payment attempt fails, with retry prompts sent to the user.

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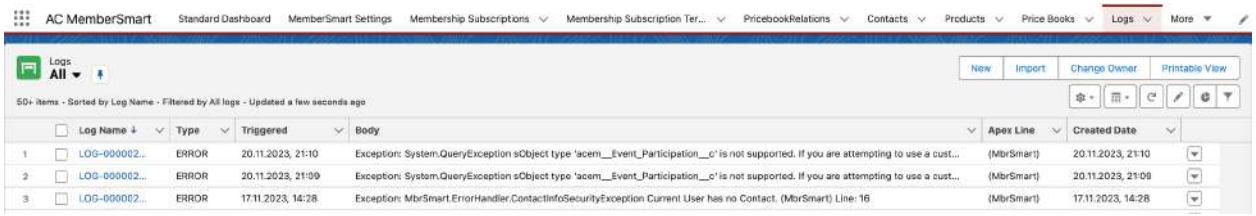
For AC Unified Checkout: Installment status updates are triggered based on order creation or Add to Cart actions.

For Native Payments: The logic remains unchanged; statuses are updated based on subscription creation.

Logs

The custom Logs object serves as a repository for logs generated by Apex code. These logs provide valuable insights into the execution of Apex code, enabling administrators to track and troubleshoot the performance of the product's logic.

The records are saved under the Logs tab.



The records store the log name, type, body, date triggered, and Apex line.

Logs are created in the following cases:

- When a specific trigger is disabled.
- When custom metadata records are successfully saved.
- When payments are made for instalments through either the Native or Checkout provider (Finalize Payment or Recurring Payments).

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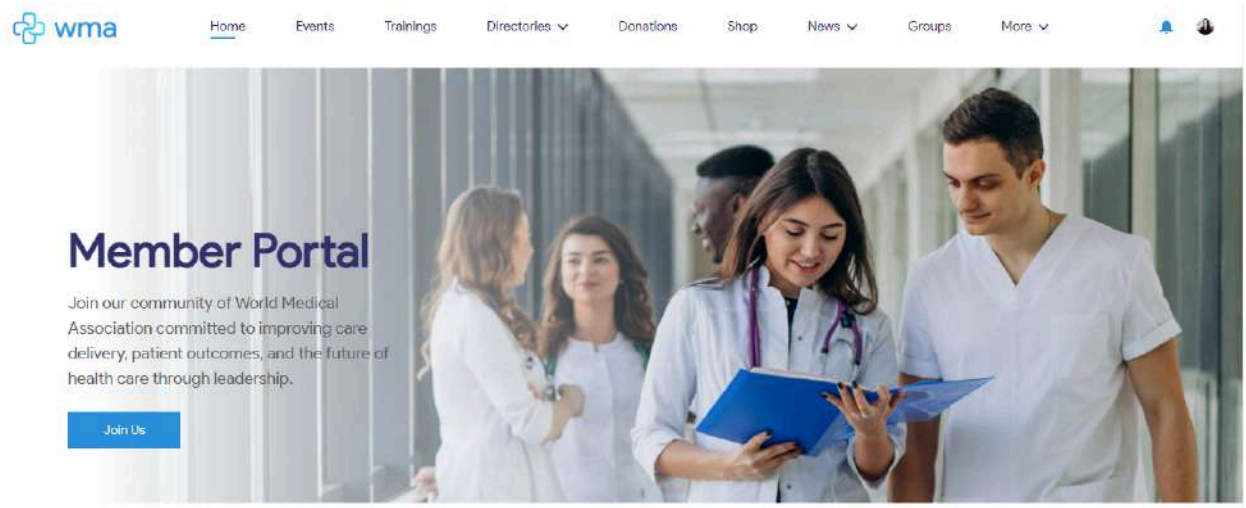
Member Portal Administration & Setup

The key tool for member engagement is the member portal.



We provide a subscription management system with a self-service portal.

Set Up Self-Service Member Registration

With this feature, users can register as members on site, renew and cancel their subscriptions.

Set up your home page by adding the Member Registration component that evokes a Member Registration flow, or renew/cancel the subscription flow if the user is already a member.

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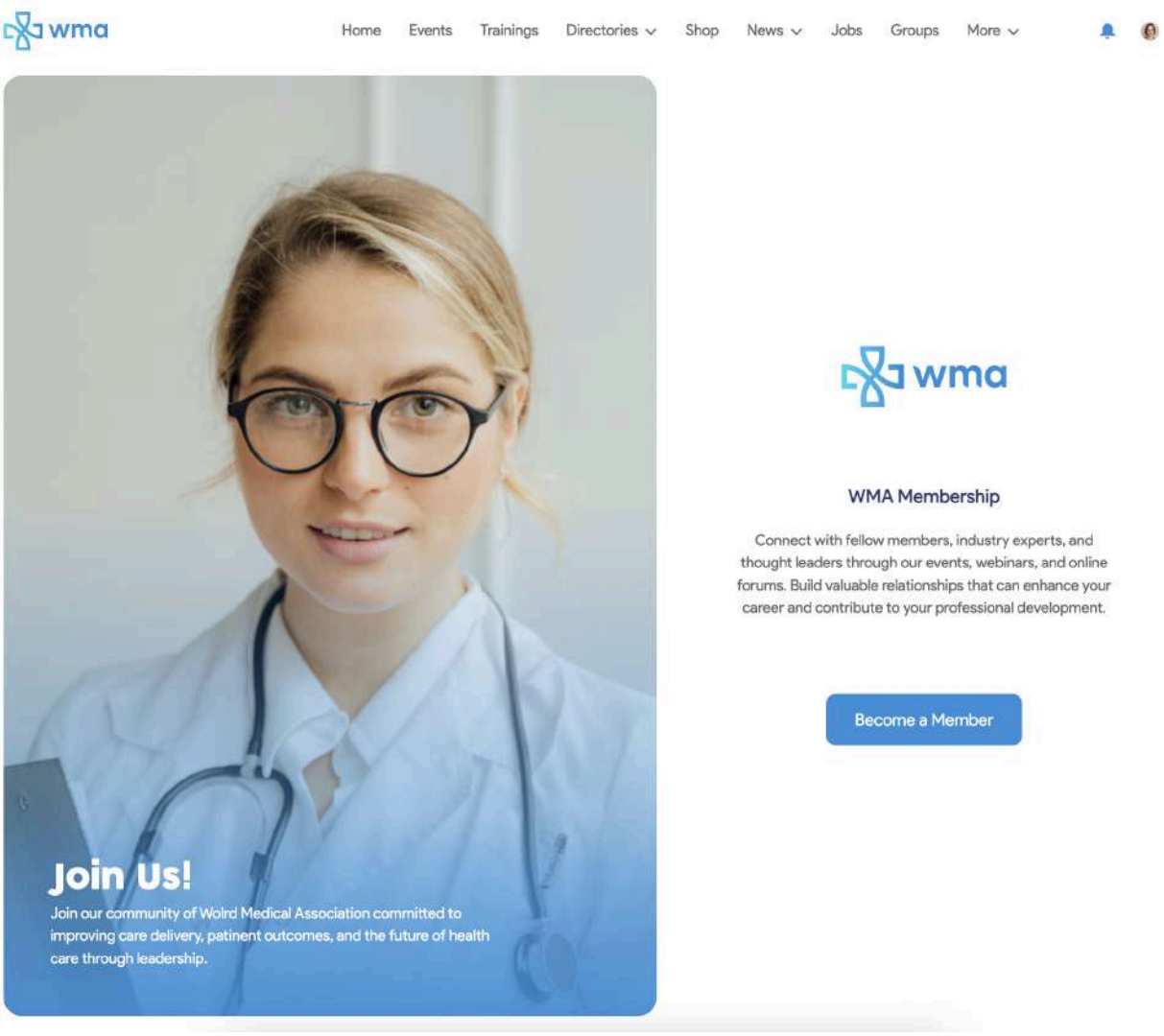

Member Registration Component

Using the component, users can register as members on site, renew and cancel their subscriptions. The component can be used on any site page.

- Add the component to the page:

In Experience builder, click on the components tab to find the Member Registration component in the drop-down list, and drag it to the home page canvas or create a separate joining page.

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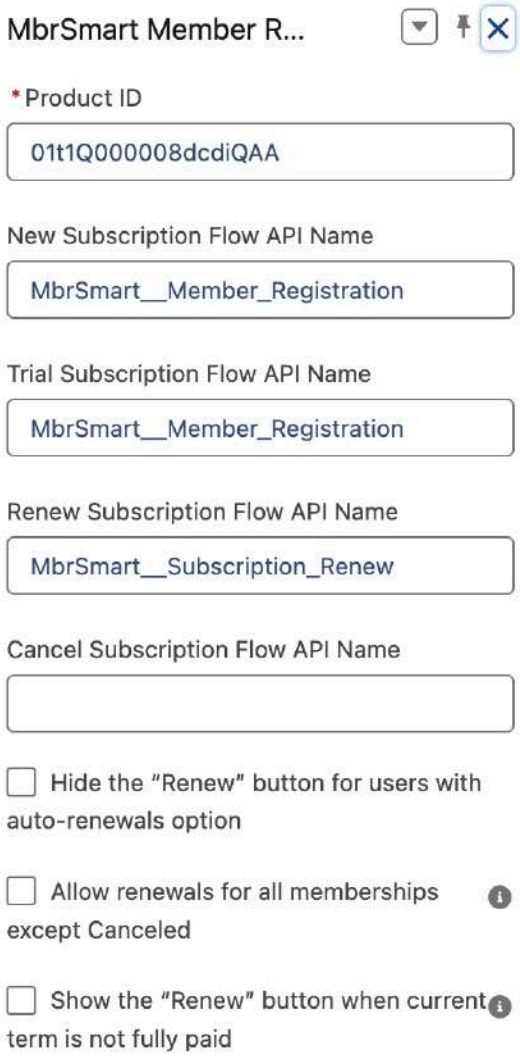
- The component has the following properties:



Product ID – required field
- Fill in with the product ID

New Subscription Flow API Name
- Filled in with the flow API name
- The flow is evoked by “Become a Member” button (the button is hidden if the field is blank)

Trial Subscription Flow API Name
- Filled in with the flow API name
- The flow is evoked by “Start Trial” button (the button is hidden if the field is blank)

Renew Subscription Flow API Name
- Filled in with the flow API name
- The flow is evoked by “Renew” button (the button is hidden if the field is blank)

Cancel Subscription Flow API Name
- Fill in with the flow API name
- The flow is evoked by “Cancel” button (the button is hidden if the field is blank

Hide the “Renew” button for users with auto-renewals option
- Hide the button when the Auto-renewals option is selected for a specific product by the admin in the backend

Allow renewals for expired memberships – If enabled, expired subscriptions can be renewed

Show the “Renew” button when current term is not fully paid – Enable to show the ‘Renew’ button even if there are unpaid instalments on the current term

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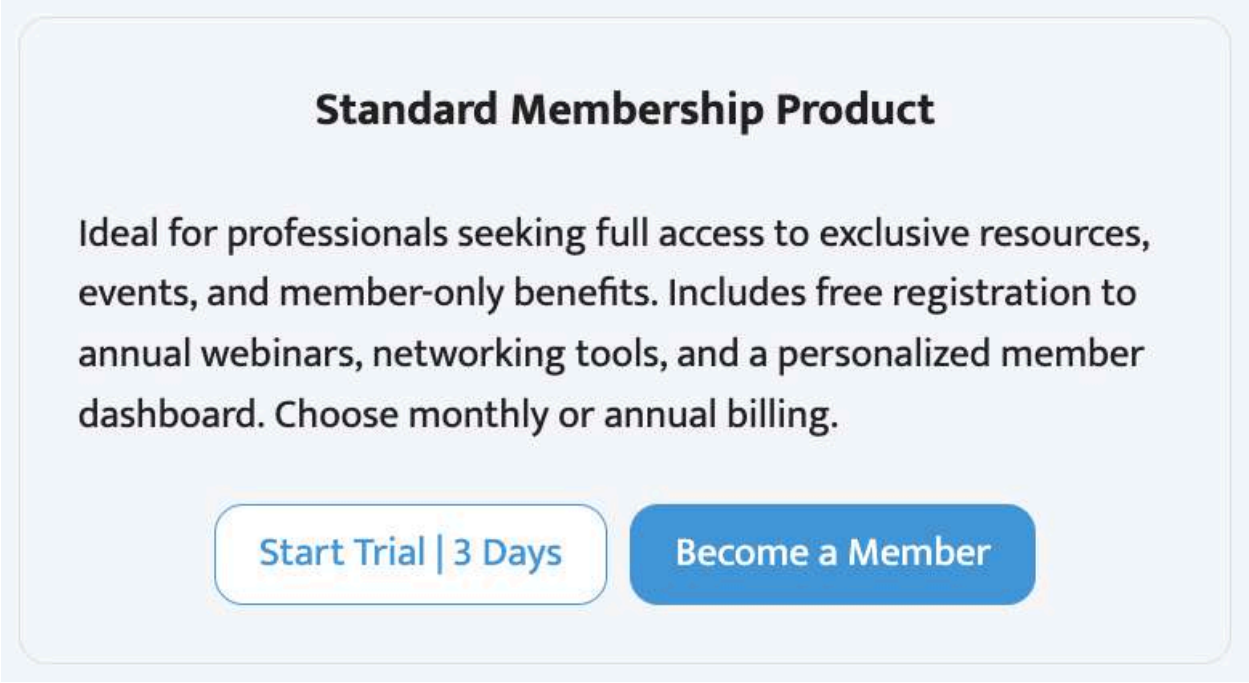
- If the user is already a member, the component will display the *Renew*, and *Cancel* buttons instead of *Become a Member* button.



Note To display any of the mentioned buttons the flow API name should be added to the component's property.

Note We only provide the default member registration flow and the renewal flow. The cancel flow should be created by your administrator according to your needs.

Membership Action Buttons

The Membership Manager component supports four key user actions: Become a Member, Start Trial, Renew, and Cancel. These buttons display or hide dynamically based on user status and system settings. Each button launches its respective flow when clicked.

1. **Become a Member**

Displayed When:

- New Subscription Flow API Name property is filled.
- The user is a guest or does not have a subscription for this product.
- The user has a subscription with status: Expired or Cancelled.

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- The user has not started or already completed a trial.

Hidden When:

- The user has an active subscription.
- The user has an active trial.

On Click:

- Hides the Start Trial button (if displayed).
- Launches the standard registration flow.

2. **Start Trial**

Displayed When:

- Trial Subscription Flow API Name property is filled.
- The product allows trials (Is Trial Accessible = TRUE).
- The user has never received a trial for this product.
- The user does not have an active membership for this product.

Hidden When:

- The user already used a trial for this product.
- The user has an active membership.
- The product does not support trials.

On Click:

- Hides the Become a Member and Renew buttons (if displayed).
- Starts the trial registration flow.

3. **Renew**

Displayed When:

- Renew Subscription Flow API Name property is filled.
- The subscription is not a trial.
- The user has Create access to Subscription and Term objects.
- The user owns the subscription.
- Subscription status is Active, Suspended, Pending, or Expired.
- The subscription exists and has more than one term.
- The setting Allow renewals except for Cancelled is enabled.

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- If the setting hideRenewForAutoRenewals is empty or auto-renewal is enabled.
- All instalments on the current subscription term have Status = ‘Closed Collected’, unless the property “Show the ‘Renew’ button when current term is not fully paid” is enabled.

Hidden When:

- Subscription is Cancelled.
- The user has an active trial.
- Auto-renewal is enabled and the hideRenewForAutoRenewals setting is active.
- The current term has any instalments where Status ≠ ‘Closed Collected’, and the setting “Show the ‘Renew’ button when current term is not fully paid” is disabled (default).

On Click:

- Proceeds with the renewal flow.

4. **Cancel**

Displayed When:

- Cancel Subscription Flow API Name property is filled.
- The user has Update access to Subscription and Term objects.
- Subscription status is Active, Pending, or Suspended.
- The user owns the subscription.

Hidden When:

- No active subscription exists.
- The subscription is Cancelled or Expired.
- The user never had a subscription.

On Click:

- Executes the subscription cancellation flow.

Member Registration Flow

We provide the default flow that evokes member registration processes by clicking the “Become a Member” button on the Member Registration component.

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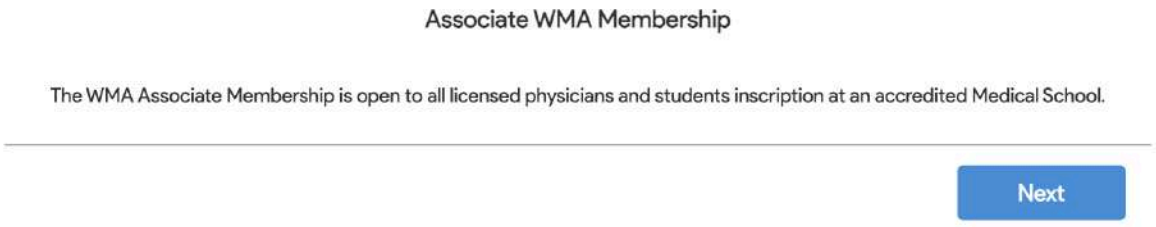
You can customize the flow according to your needs.

Note We suggest cloning the default flow before making any changes to it.

The member registration steps are as follows:

Screen 1: Product Info

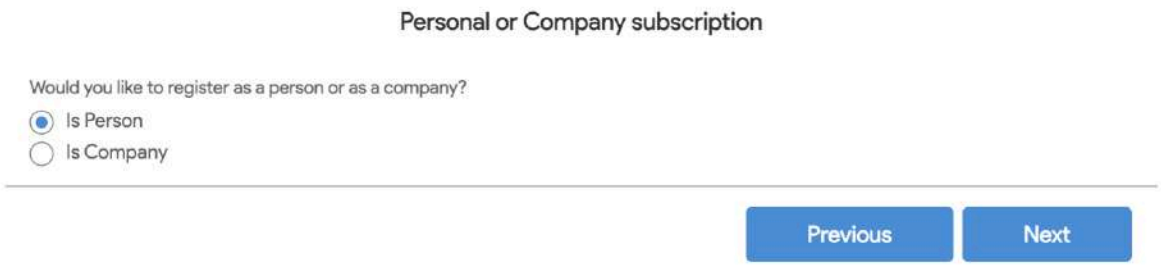


The screen displays product information:

- Product Title
- Product Description

Screen 2: Person or Company

At this step, users choose whether the subscription will be organization-based or individual.



- Is Person – individual membership
- Is Company – organization-based membership

Screen 3: Account or Contact Info

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Scenario A: If the “Is Person” (individual subscription) option is selected on the Screen 2, the flow will run as follows:

Flow logic for Guest users:

If a user is a *guest user*, the flow displays contact creation fields to create a new contact for the registering member:

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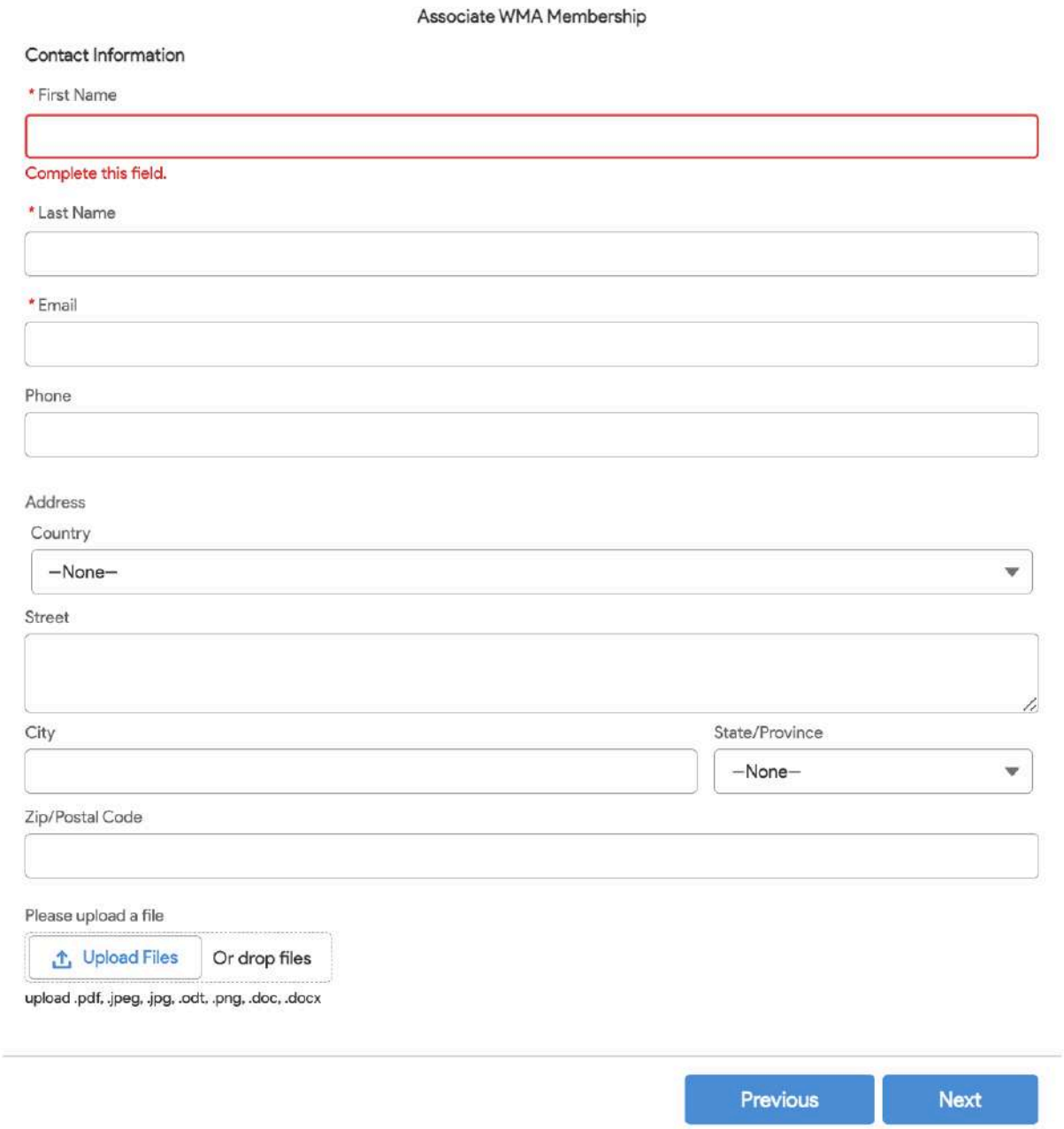

Fields to fill in:

- First Name – contact first name
- Last Name – contact last name

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- Email – contact email address
    - The number of characters entered in the field must not exceed 75 characters. This includes the entered email address (75) and characters (5) specified in the 'Specify preferred symbols to be added before the '@' symbol in usernames' setting. The combined total must be 80 characters maximum.
- Phone – contact phone
- Address – contact address
- Upload file (pdf, jpeg, jpg, odt, png, doc, docx)

Flow logic for Community users:

If a user is a logged-in user – the screen is not displayed as the contact record exists for the user.

Scenario B: If the “Is Company” (organization-based subscription) option is selected, the flow will run as follows:

Flow logic for Guest users:

If the person who purchases the organizational membership (primary contact) is a guest user, the flow displays account and contact creation fields to create a new account and contact for the registering member:

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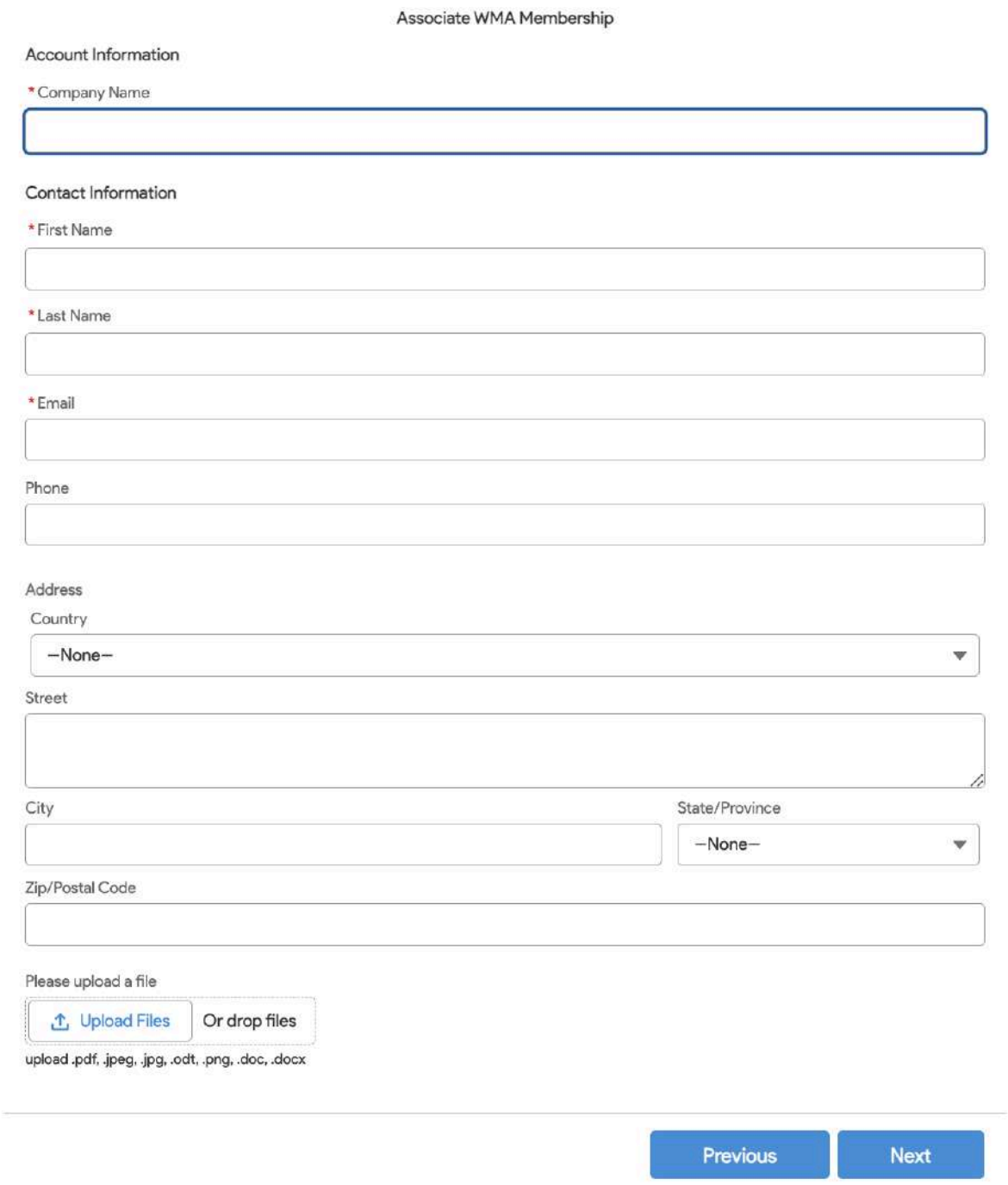

Fields to fill in:

- Company Name – account name

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    - New account is created for the organization. The primary contact will be assigned to the account.

- First Name – primary contact first name
- Last Name – primary contact last name
- Phone – primary contact phone number
- Email – primary contact email address
- Address – primary contact address
- Upload file (pdf, jpeg, jpg, odt, png, doc, docx)

Primary contact logic:

The primary contact for a subscription can be changed if necessary. To update the primary contact, follow these steps:

- Update the contact on the Subscription record and on any future instalments that are yet to be paid.
- Remove the payment method associated with the old primary contact.
- The new primary contact must either:
    - Add their own payment method, or
    - Reassign the payment method from the old contact to themselves.

Flow logic for Community users:

If a user is a logged-in user – the account/contact creation screen is not displayed. The flow will run as follows:

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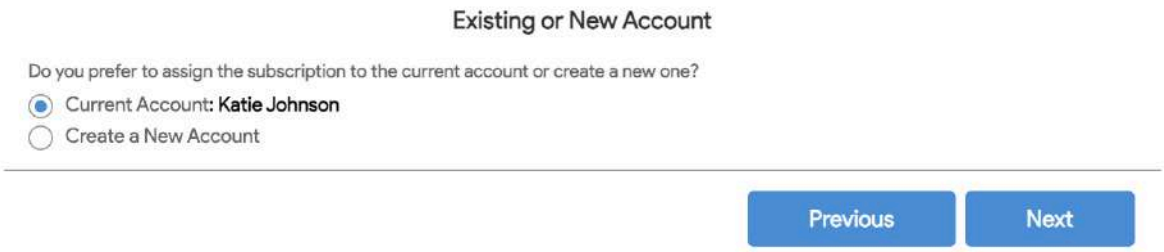
- “Existing or New Account” screen. Decide whether to purchase the membership for the existing account or create a new one.



  - “Current Account” option – if selected, the subscription will be assigned to the existing account of the user and Screen 4 will be opened.

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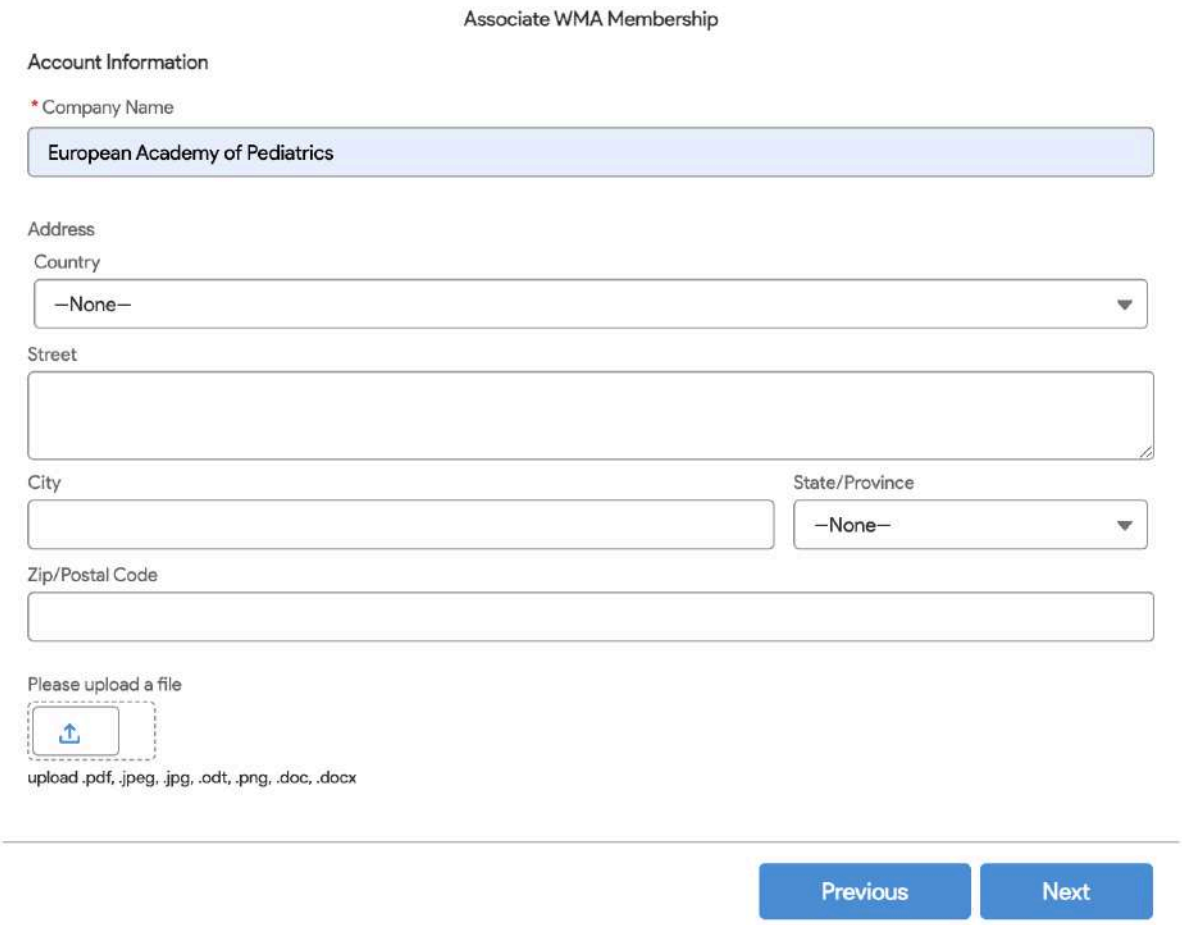
- “Create a New Account” option selected – a new screen for reating a new account will be opened.



Fields to fill in:

- Company Name – account name
  A new account is created for the organization. The primary contact will be assigned to the account.
- Address – company address
- Upload file (pdf, jpeg, jpg, odt, png, doc, docx)

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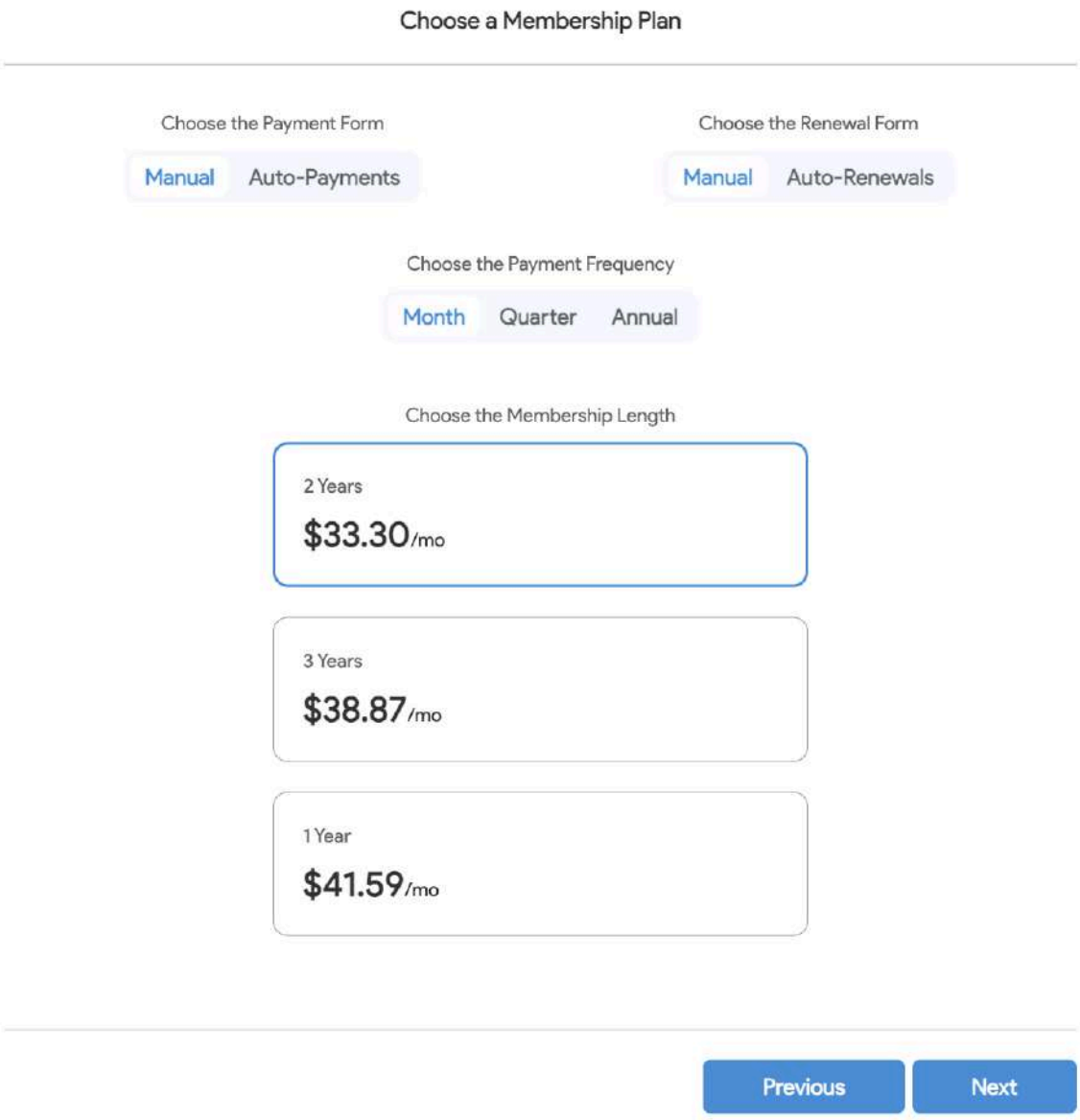
Screen 4: Membership Plan



The component displays the possible options defined for the membership product:

- Choose the Payment Form
    - Select Manual or Auto-Payments.
      Manual: The user will need to make payments manually (e.g., via invoice).

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- Auto-Payments: Payments will be automatically deducted using the RecurringPaymentsScheduler.

  Note For internal registration, only a manual payment form by invoice is available. The section is displayed for paid subscriptions only.
  Help text is displayed: "If you have selected auto-payments, please ensure to add the default payment method on the upcoming payment screen."
  You won't be able to change the payment option once you proceed.

- Choose the Payment Method
  - Allows users to select a preferred payment type for their membership subscription. Users can choose either Invoice or Card or Bank as the payment method.

    The behaviour of the section:

    - Site Environment with Native Payments:
      Both Invoice and Card or Bank options are displayed when:
      Payment Service Setting → paymentProvider = Native and
      Checkout Settings → isCheckoutEnabled = False in custom metadata.
    - Site Environment with AC Unified Checkout Integration:
      The Choose the Payment Method field is hidden when: Payment Service Setting → paymentProvider = Payment Service and
      Checkout Settings → isCheckoutEnabled = True in custom metadata.
    - If Card or Bank is selected, the Payment Form on the subsequent flow screen will be displayed.
    - When Native Payments are enabled, the Payment Form field in the Membership Plan component displays the following options based on the selected Payment Method:
      If Payment Method = Card or Bank: Both Manual and Auto-Payment options are available.
      If Payment Method = Invoice: Only the Manual option is displayed.

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    - **Note** For internal registration, only a manual payment form by invoice is available. Settings can be changed manually from the internal environment.
    - The section is displayed for paid subscriptions only.
- Choose the Renewal Form
    - The displayed values are controlled on the Product level.
    - Select the appropriate option.
    - For any of those options (automatic or manual renew), the logic of the renewal process is as follows: when renewing, a new membership subscription term is created. When the auto-renewals option is selected, when renewing, a new Subscription Term is created only if Subscription Status = “Active”.
- Choose the Payment Frequency
    - The displayed values are controlled on the Product level.
    - Select how frequently to pay for the membership.
    - Payment Frequency Filtering:
        - When loading the Membership Plan component, the system hides any payment frequencies shorter than the Grace Period or Instalment Payment Period.
          Example: If the Grace Period or Instalment Payment Period is 60 days, payment frequencies shorter than 60 days (e.g., 1 month) will not be displayed.
        - When selecting a payment frequency, the system also hides membership lengths that are shorter than the Grace Period or Instalment Payment Period.
- Choose the Membership Length
    - The displayed values are controlled on the Product level.
    - The prices are sorted from low to high.

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- For free subscriptions, the section displays “Free” value instead of the price.

By default, the Membership Plan component displays values from the global picklists - Subscription Length, Subscription Renewal Form, Payment Frequency. The labels can be changed if needed.

Screen 5: Confirmation screen

See the summary of the made selections before finishing the subscription assignment. Records (account, contact, subscription, etc) will be created after the user clicks the Confirm button.

If native payments are used:

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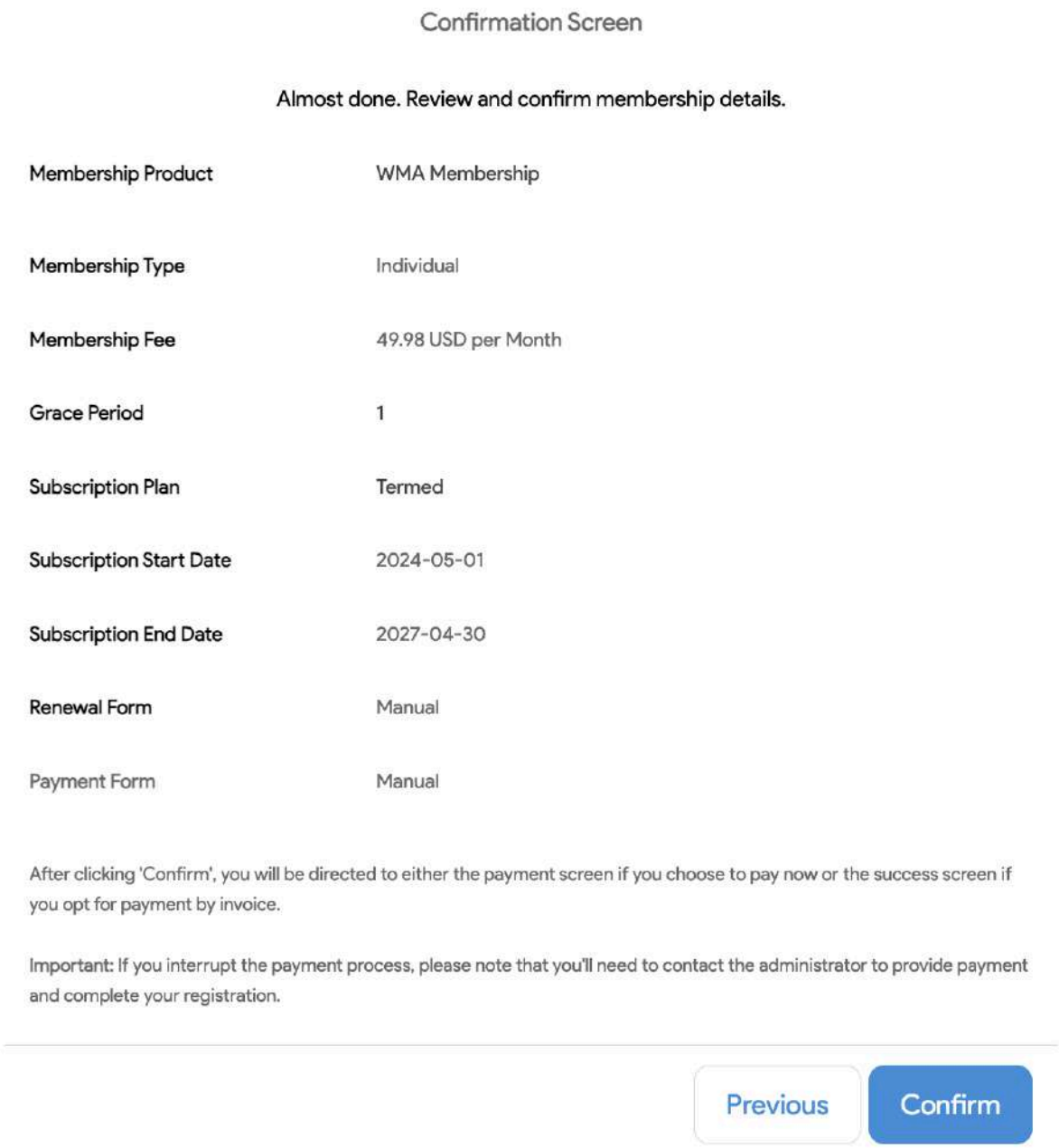

If AC Unified Checkout integration is enabled in settings:

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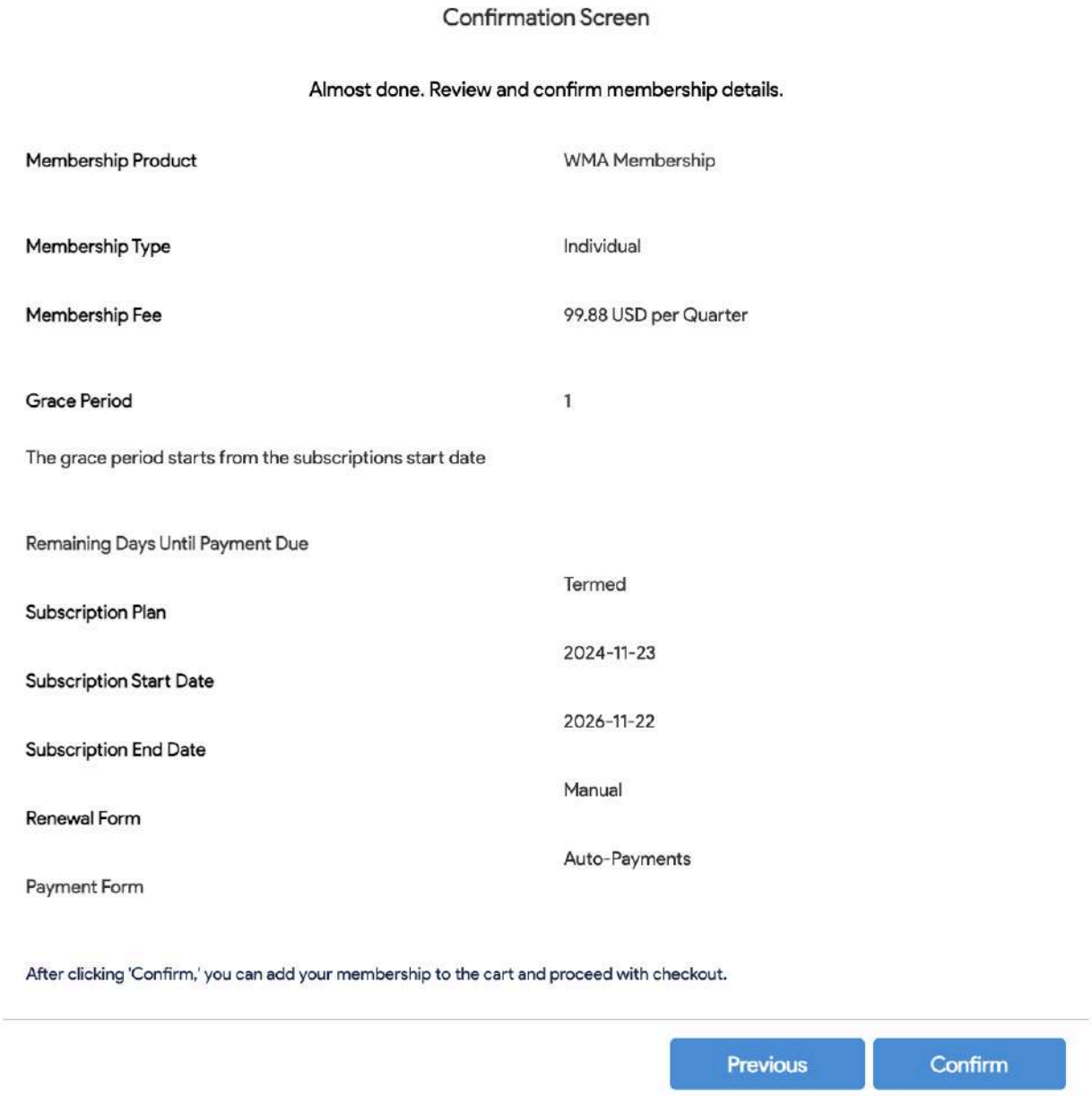

On the Confirmation screen, it is possible to display the checkbox to confirm that the user has read the Terms and Conditions.

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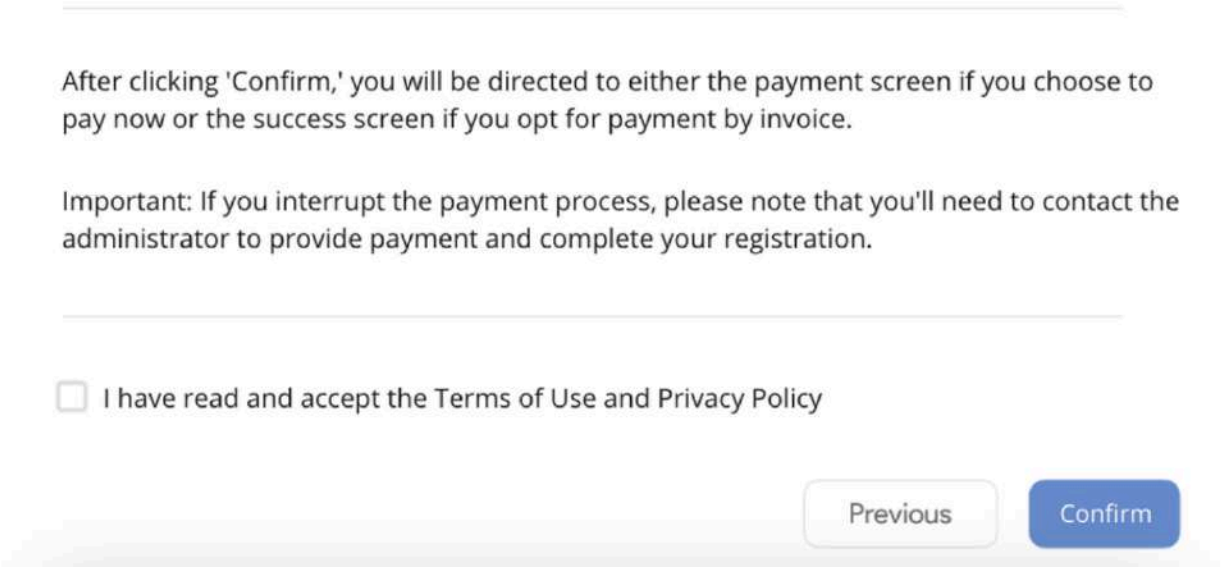
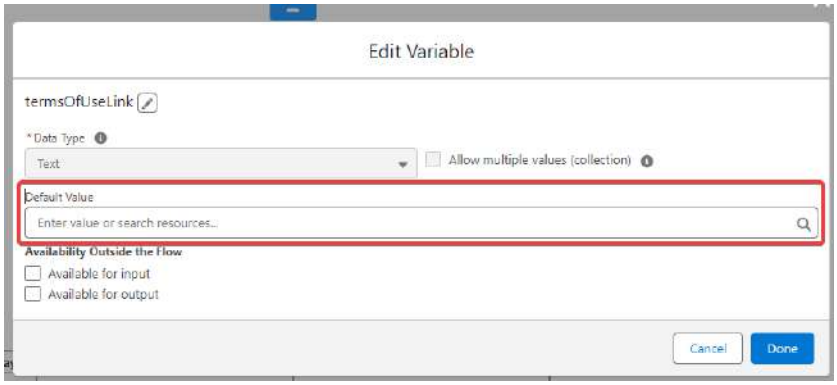


The 'Terms of Use' and 'Privacy Policy' are displayed as clickable links, opening in a new tab when clicked, with the checkbox hidden if the links are blank and displayed only when both have values.

Checkbox setup:

- Setup → Flows → select the Member Registration flow
- In Flow Builder → Manager, find the termsOfUseLink variable and click Edit, then fill in the value of your link and click Done.



- Perform step 2 for the privacyPolicyLink variable
- Save flow

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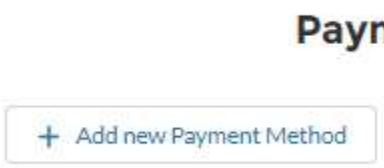
Next Screens: Native Payments Behavior

The screens 6-8 below are displayed if MemberSmart native payments are used. If integration with AC Unified Checkout is enabled, proceed directly to Screen 9.

Screen 6: Add New Payment Methods

Create new payment method or select one of the existing payment methods (for community users).

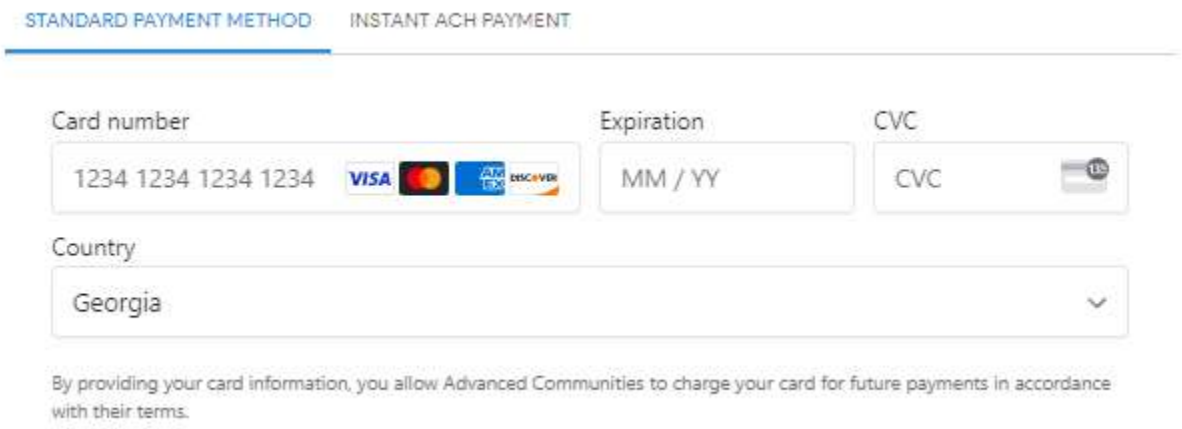


Screen 7: Payment Component

A pop-up window with the component is opened:

Select Card, ACH Direct Debit or Bacs option. Please note that ACH or Bacs option is displayed according to the currency selected on the org.

STANDARD PAYMENT METHOD (Card Payment Method)



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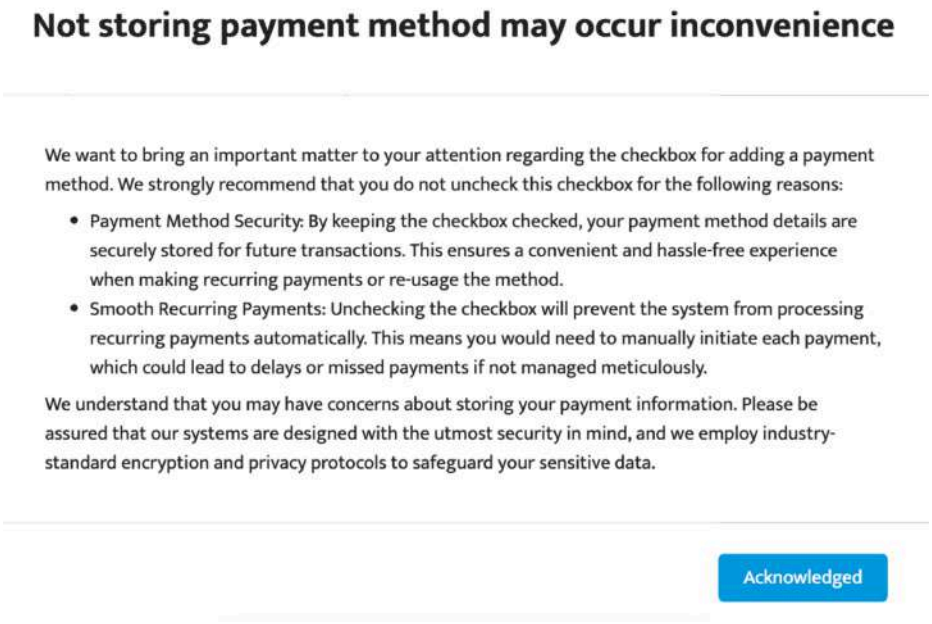
Fill in:

- Card number
- Expiration
- CVC
- Country
- Enable the “Save the payment method“ checkbox (for community users) or “Save the payment method upon user registration” (for guests) to save the payment method
    - If the checkbox is unchecked, the modal window with the following message is displayed:



      The “Acknowledged” button closes the modal window without additional actions.

- Save

INSTANT ACH PAYMENT (ACH Direct Debit Payment Method)

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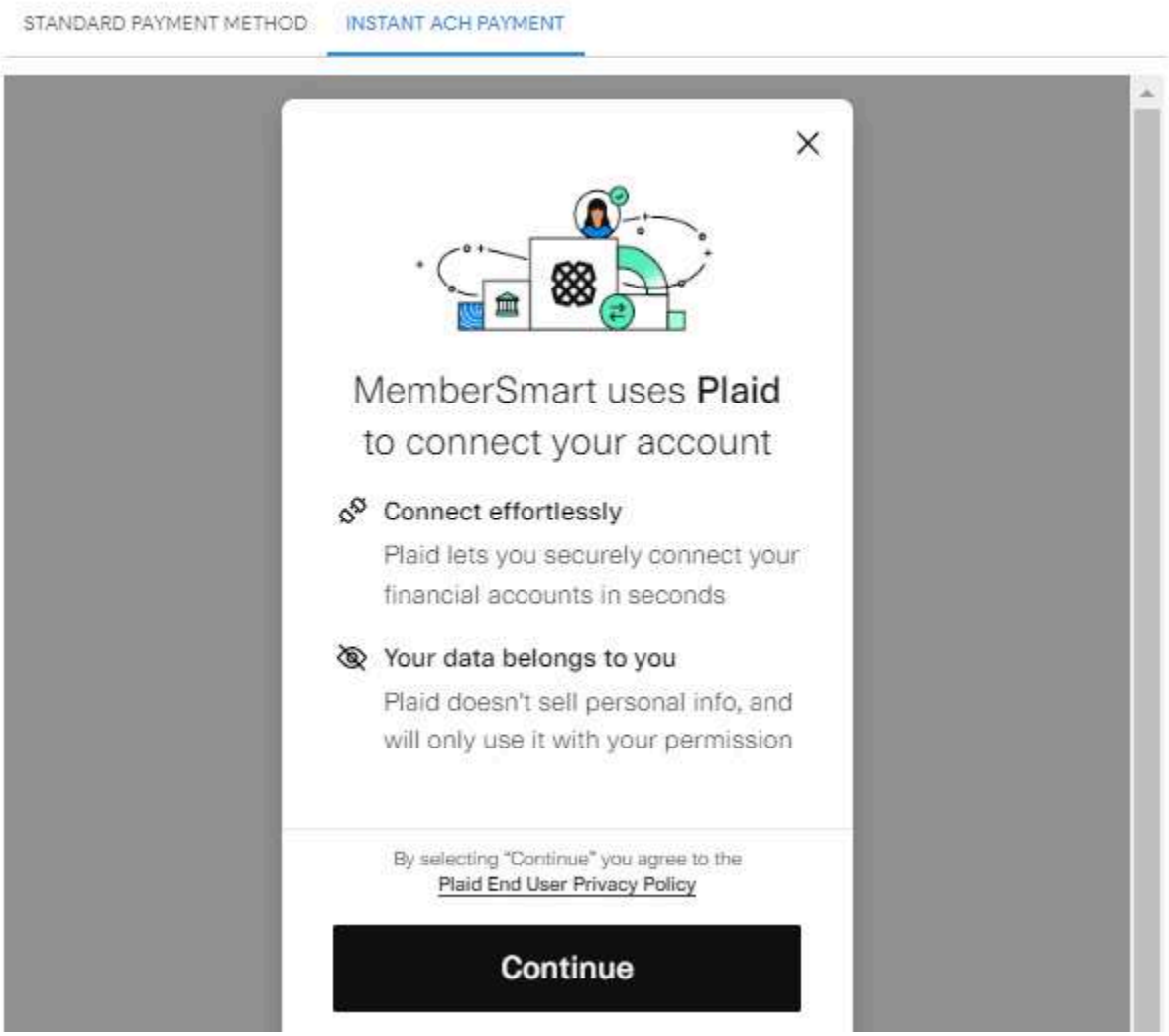
We use Plaid for connecting your bank account.

The tab will be hidden If the Plaid Settings are not filled in MemberSmart Settings.

- Go to the INSTANT ACH PAYMENT tab



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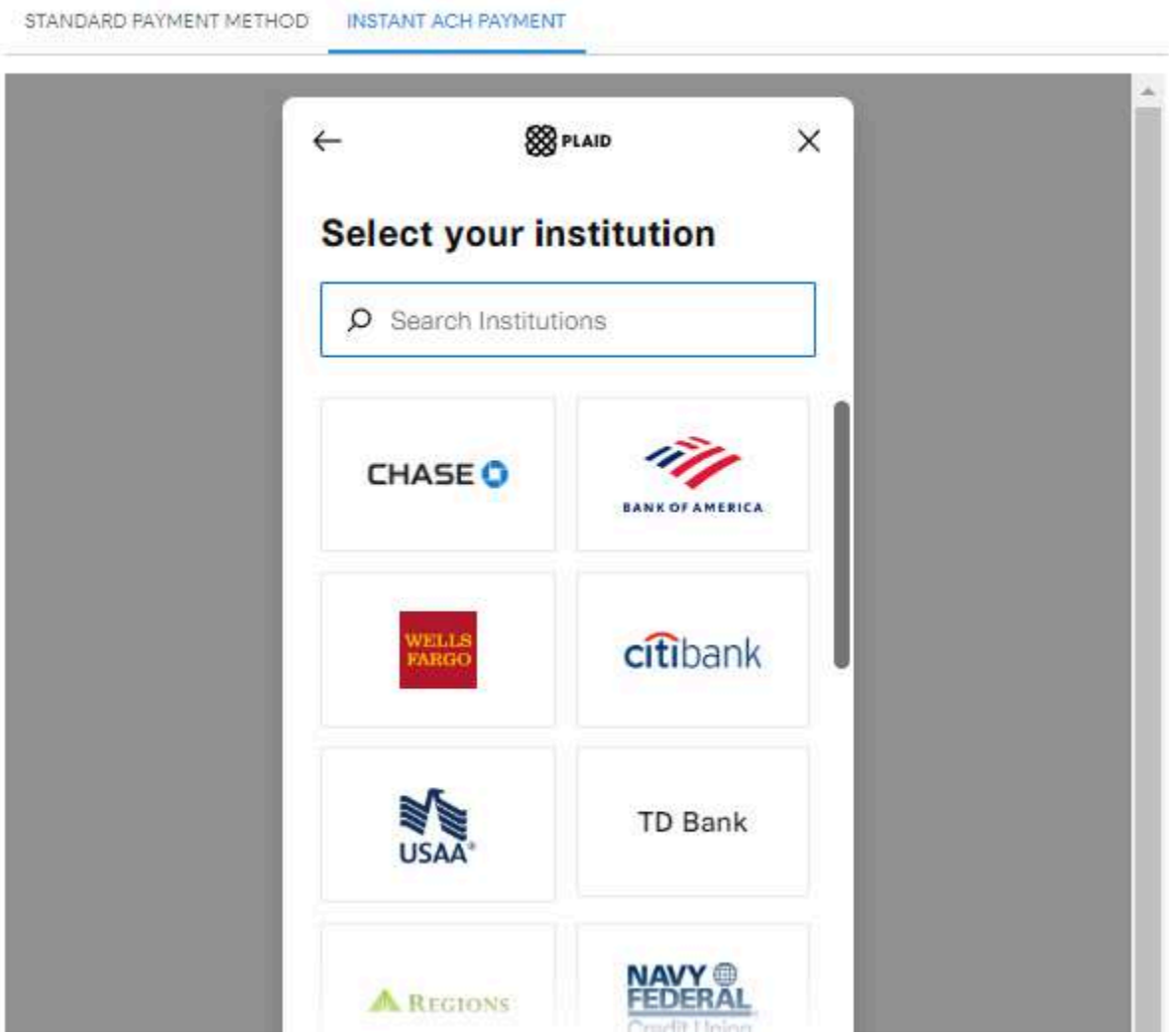
- Select your Bank



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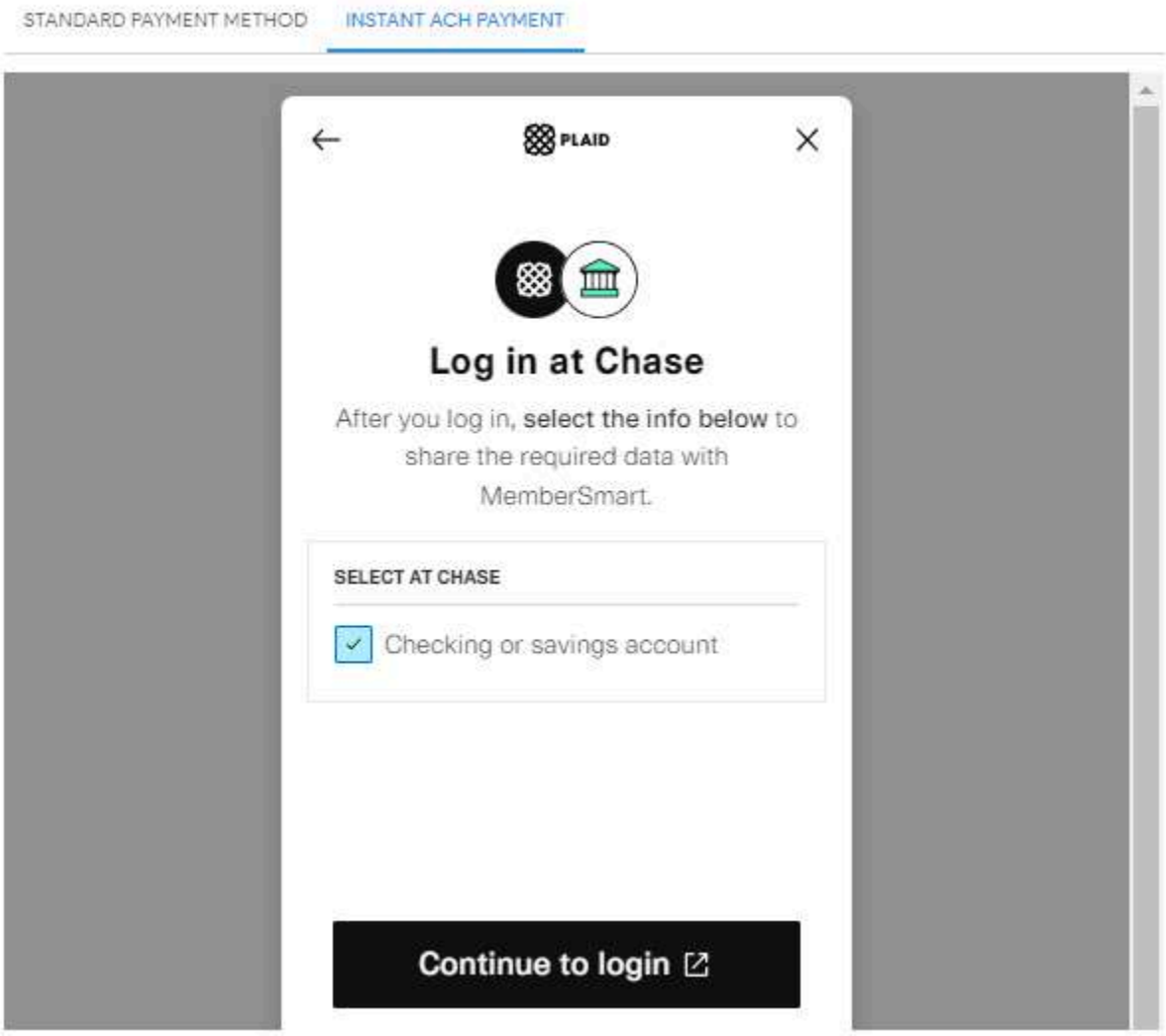
- Authenticate



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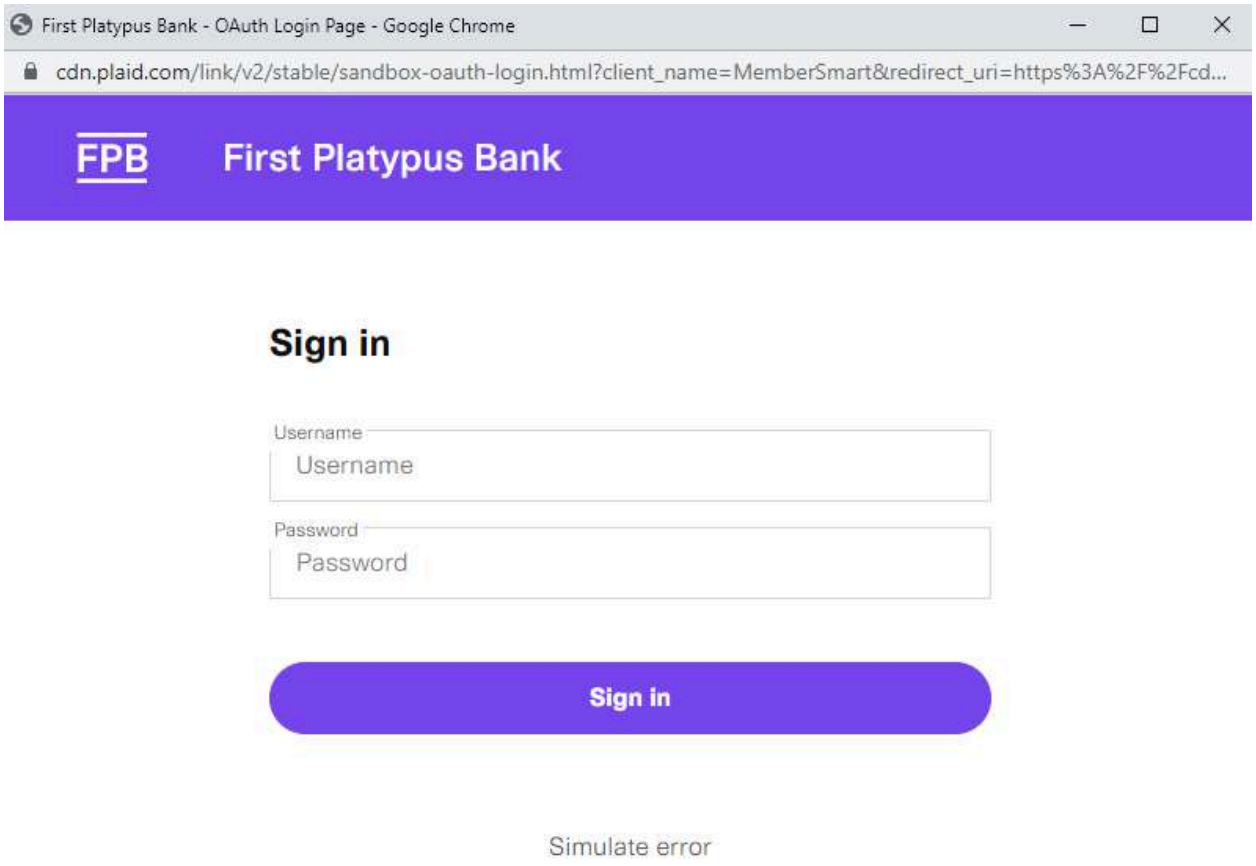
- Go through the Sign In process



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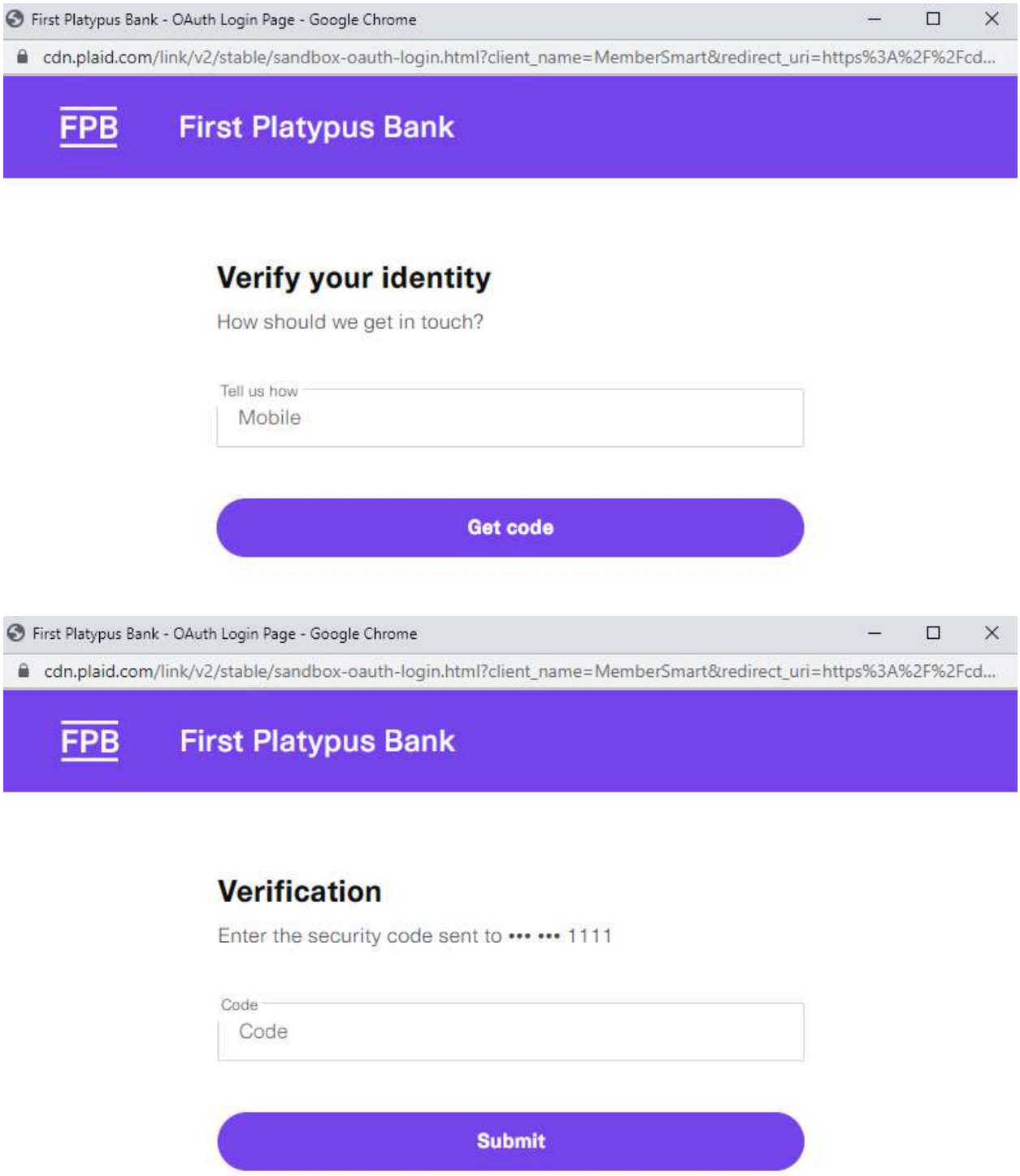

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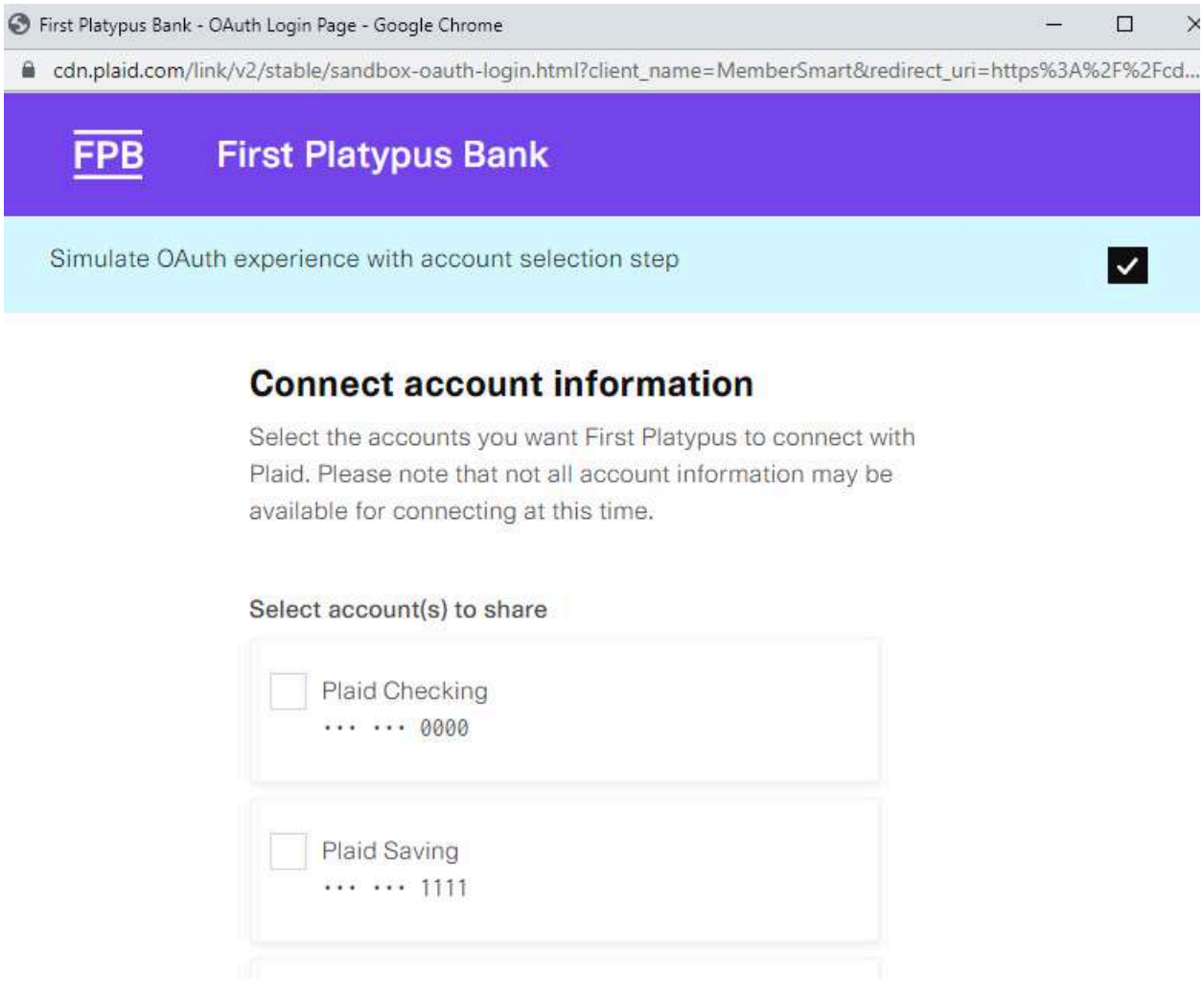
- Connect account information. Select the accounts you want to connect with Plaid



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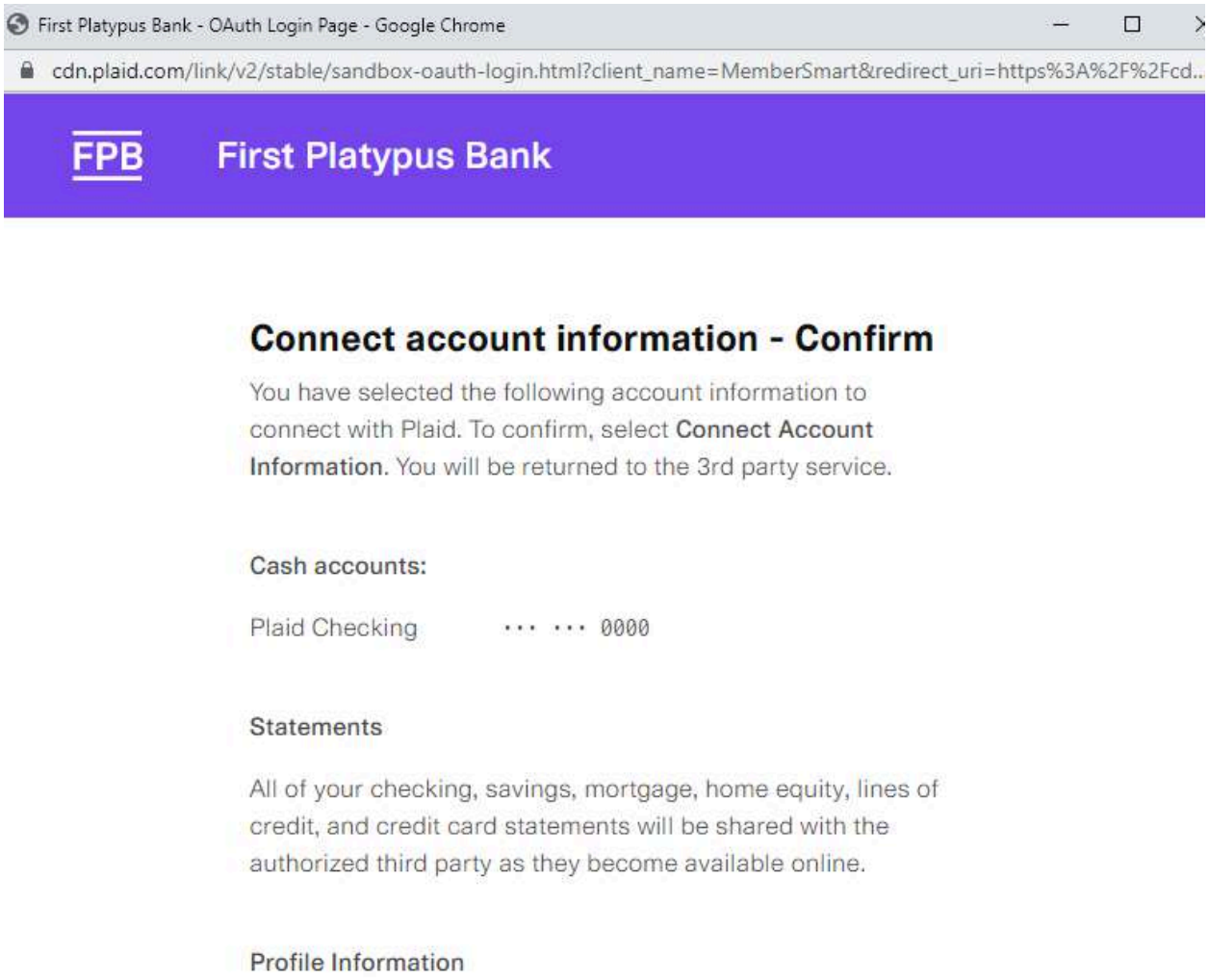
- Confirm



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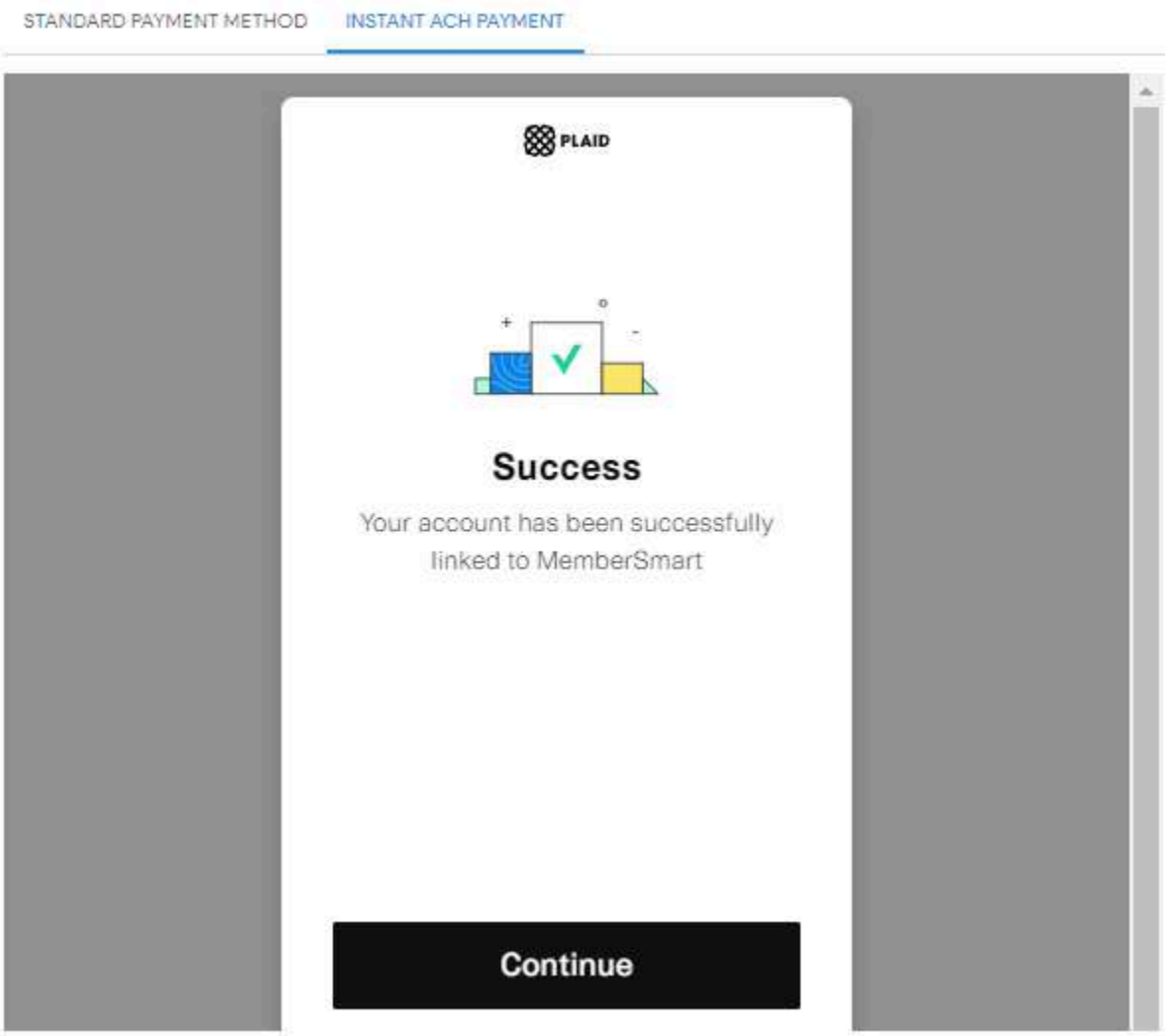
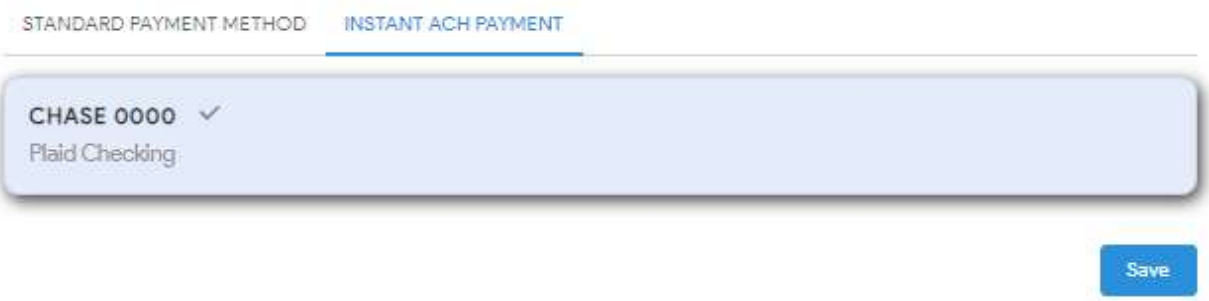
- See success message



- Select your account



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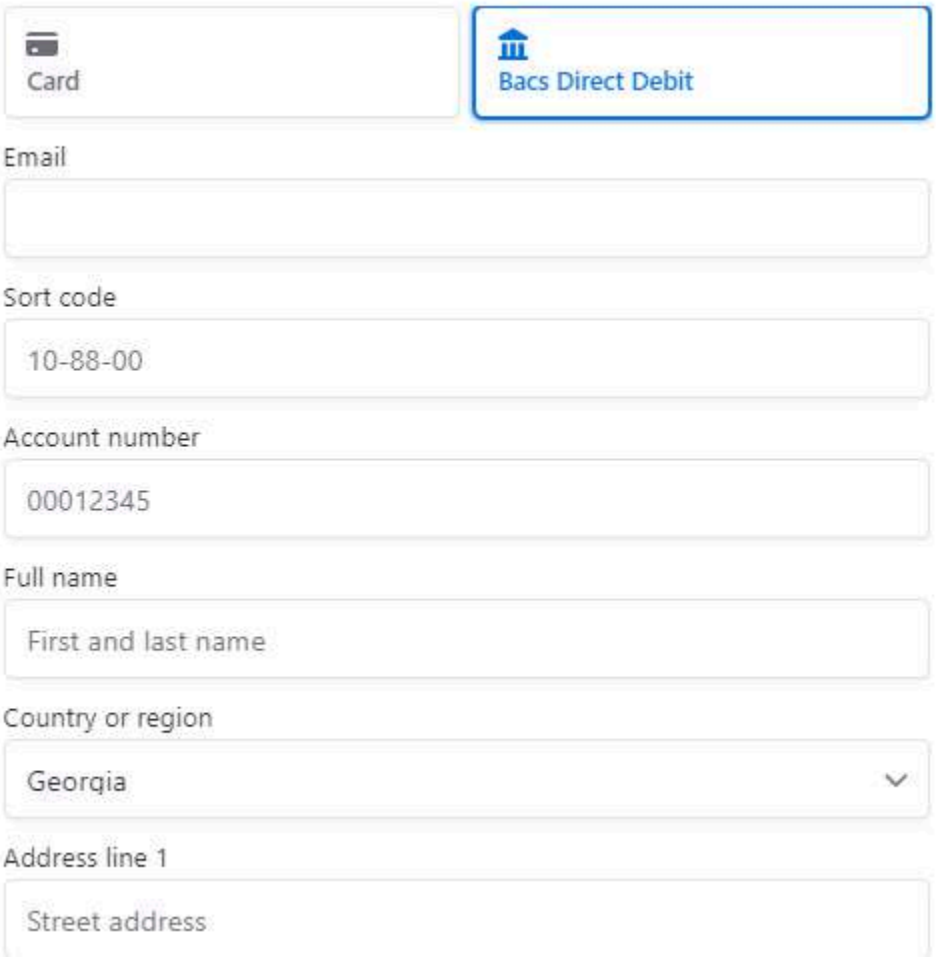
- Save or go back and select another bank

BACS PAYMENT METHOD



Fill in:

- Email
- Sort code
- Account number

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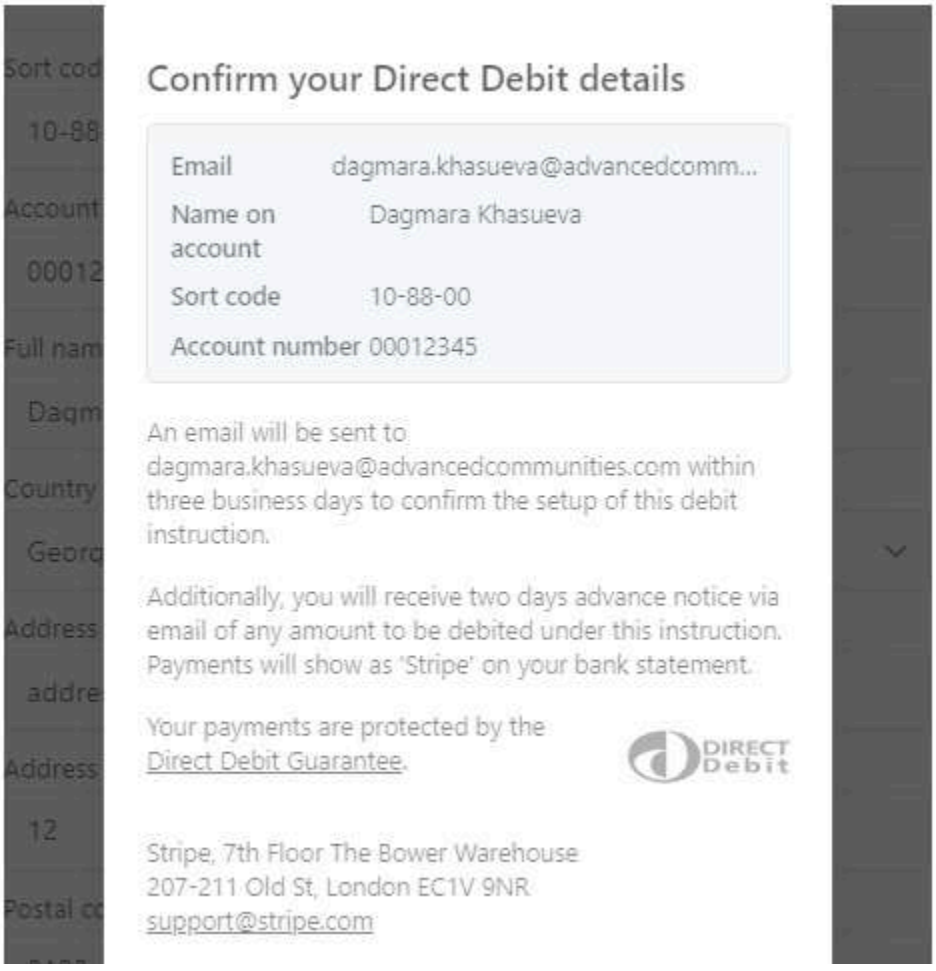
- Full name
- Country or region
- Address line 2
- Address line 2
- Postal code
- City
- Click “Purchase”
- Confirm or modify details



- Finish

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Note When you delete a payment method from Salesforce environment, it is deleted in Stripe as well.

Screen 8: Success

See the confirmation screen.

Next Screens: AC Unified Checkout Integration Enabled

The screens below are displayed after the Confirmation screen if AC Unified Checkout integration is enabled in settings

Screen 9: Choose Your Checkout Option

The member registration flow is integrated with the AC Unified Checkout app's functionality. Specifically, there is a component that allows adding the subscription to a cart or paying immediately.

The component is displayed after the Confirmation screen. The screen is displayed when the AC Unified Checkout app is installed on the org and the integration is enabled in the MemberSmart Settings.

After clicking the “Add to Cart” button, the following toast message is displayed: ”Congratulations! Your membership has been successfully added to the basket.”

After clicking the “Pay Now” button, the AC Checkout Payment Methods component is opened, then the users have the ability to provide the payment. AC Unified Checkout currently does not support sending invoices through express checkout. All express checkout transactions are processed as card payments.

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Important AC Unified Checkout integration is enabled in the settings, it is important to deactivate the native Membership Request, Invoice, and Receipt email templates to prevent duplicate notifications being sent alongside the AC Checkout app's email notifications.

If AC Checkout is installed on the org, and the “Create users when self-registering with the registration flow on site” setting is enabled, users will be created only after the order is paid and closed.

Subscription Renew Flow

We provide the default flow that evokes the membership renewal process by clicking the “Renew” button on the Member Registration component.

To let existing members easily renew their memberships, go to the Member Registration component and add the API name of the flow to the Renew Subscription Flow API Name component property. The API name should contain the “MbrSmart__” namespace.

You can customise the flow according to your needs.

Note We suggest cloning the default flow before making any changes to it.

Membership subscriptions are renewed with the same data taken from the previous membership subscription term, including the “Payment form”.

Renew Button Visibility

The Renew button is displayed to users based on specific conditions to ensure appropriate access and functionality. Below are the criteria for when the button will appear:

- Configuration Requirement:
  The Renew Subscription Flow API Name property must be filled.

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- User Permissions:
  The user must have Create access to the Subscription and Subscription Term objects.
- Subscription Ownership:
  The subscription must belong to the current user.
- Subscription Status:
  The user must have a subscription for the product with the status Active.
  The subscription must have one or more Subscription Terms.
- Auto-Renewal Setting:
  If the Hide the “Renew” button for users with auto-renewals property is disabled.
- Expired Memberships:
  If Allow renewals for expired memberships property is set to True, the Membership Subscription Status must be Expired (the status of the Subscription Term is not considered).

The membership renewal steps are as follows:

Screen 1: Membership Plan

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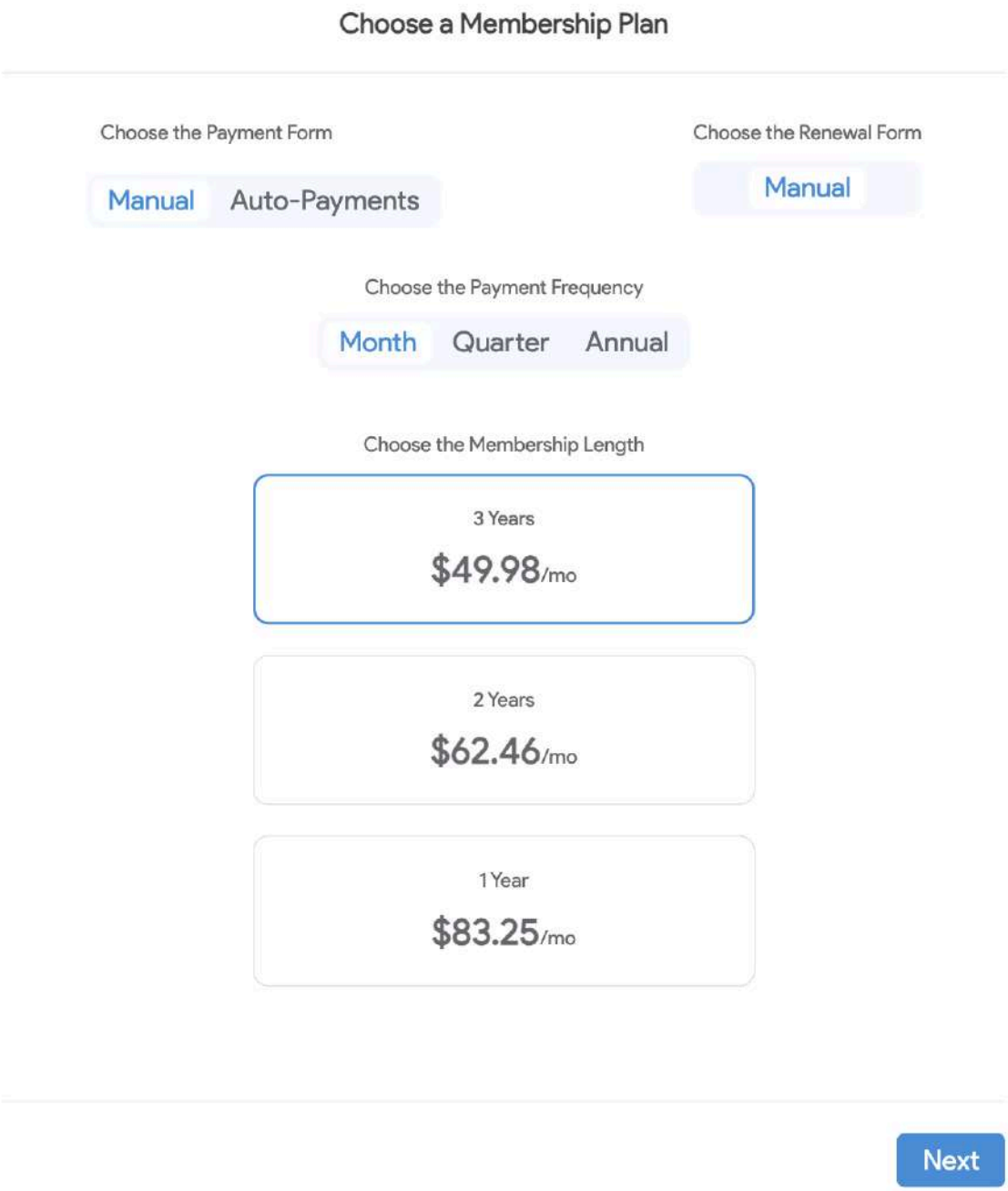

The screen displays possible options defined on the product:

- Choose the Payment Form

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- Select Manual or Auto-Payments.
  Note For internal registration, only a manual payment form by invoice is available. The section is displayed for paid subscriptions only.
  Help text is displayed: "If you have selected auto-payments, please ensure to add the default payment method on the upcoming payment screen."
  You won't be able to change the payment option once you proceed.

- Choose the Renewal Form
  - The displayed values are controlled on the Product level.
  - Select the appropriate option. The screen won't appear to a user on site when self-registering if only one value is selected on the Product object – Renewal Forms field.
  - For any of those options (automatic or manual renew), the logic of the renewal process is as follows: when renewing, a new membership subscription term is created. When the auto-renewals option is selected, when renewing, a new Subscription Term is created only if Subscription Status = "Active".
  - For free subscriptions, the section displays "Free" value instead of the price.

- Choose the Payment Frequency
  - Select how frequently to pay for the membership.
  - The displayed values are controlled on the Product level. For free subscriptions, the section displays "Free" value instead of the price.
  - Payment Frequency Filtering:
    - When loading the Membership Plan component, the system hides any payment frequencies shorter than the Grace Period or Instalment Payment Period.
      Example: If the Grace Period or Instalment Payment Period is 60 days, payment frequencies shorter than 60 days (e.g., 1 month) will not be displayed.

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        - When selecting a payment frequency, the system also hides membership lengths that are shorter than the Grace Period or Instalment Payment Period.

- Choose the Membership Length
    - The displayed values are controlled on the Product level.
    - The prices are sorted from low to high.

By default, the Membership Plan component displays values from the global picklists - Subscription Length, Subscription Renewal Form, Payment Frequency. The labels can be changed if needed.

Screen 2: Success

See the confirmation screen.

The flow creates a new Membership Subscription Term for the existing Membership Subscription.

IMPORTANT DO NOT MANUALLY EDIT MEMBERSHIP SUBSCRIPTION, MEMBERSHIP SUBSCRIPTION TERM, INSTALMENT, TRANSACTION RECORDS AFTER THEY ARE GENERATED.

PLEASE CONDUCT ALL TESTING IN SANDBOX ENVIRONMENTS, NOT IN PRODUCTION.

Flow Functionality with Person Accounts

AC MemberSmart flows are designed to seamlessly support Salesforce Person Accounts.

When Person Accounts are enabled, the Member Registration flow automatically checks the org configuration and creates a Person Account record instead of separate Contact and Account records.

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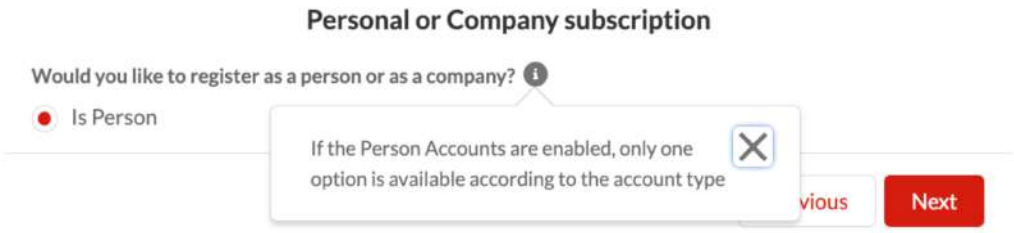
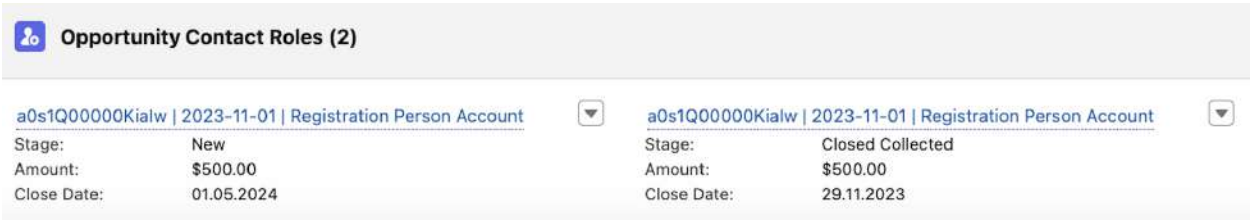
- The registration interface is simplified to show only one relevant option – “Is Company” or “Is Person.”



- A help text is displayed to clarify the limited options: “If Person Accounts are enabled, only one option is available according to the account type.”
  This message is shown only when Person Accounts are active.

Handling Individual Subscriptions with Person Accounts:

- When an Individual Subscription is created for a Person Account, the system automatically updates the Individual Member Status and Activation Date fields to reflect the active membership.
- For Person Accounts, related Opportunities are displayed under the Opportunity Contact Roles related list.



Organizational Membership Rules for Person Accounts:

- By default, Person Accounts are treated as individuals, and organizational memberships are not supported.
- When a Person Account purchases an individual subscription, their Organizational Member Status remains Non-Member.
- To allow organizational subscriptions for Person Accounts (if your use case requires it), administrators can enable the following system setting:
  Label: isSubscriptionTypeValidationDisabled
  Value: true
  This setting overrides the default subscription-type validation logic.

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Not Supported Scenarios:

- A user with a company account purchasing an individual membership.
- A user with a personal account purchasing a company (organizational) membership.
- Switching subscription types (from individual to organizational or vice versa) when Person Accounts are enabled.

If any of these scenarios occur, the system will block the action and send an error message to the administrator.

Note Partner licenses cannot be assigned to Person Accounts.

Set Up Continuous Professional Development Page

To provide your users with a full experience, create two pages – a standard “CPD” page and a “CPD User Activity” object page.

Standard “CPD” page

In the Experience Builder, create a new Standard page and add it to the navigation menu.

To create a Standard page, go to:

Pages menu – New page – Standard page – enter the Name, URL, and API name – Create.

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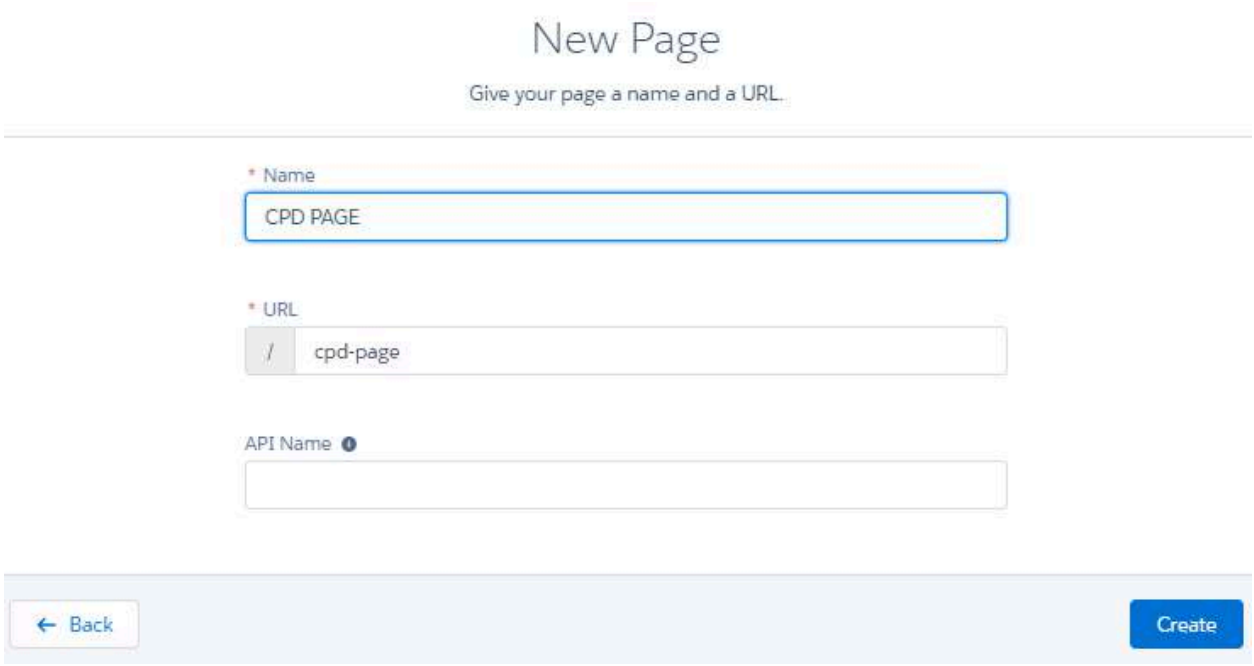

Publish your changes.

To make the page available for site users, add it to the Navigation menu.

Add the following components to the page:

CPD Container Component

The component is used on the CPD page and displays a list of CPD objectives and activities.

Add the component to the page:

- On the “CPD” page, click on the components tab to find the CPD Container component in the drop-down list, and drag it to the page canvas.
- The component has no properties

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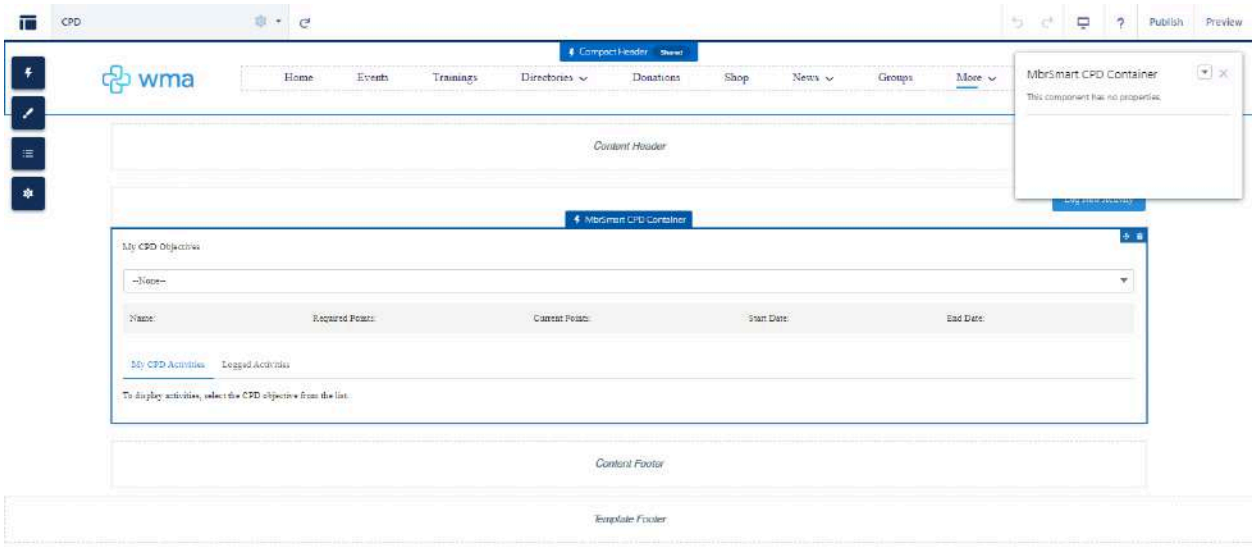


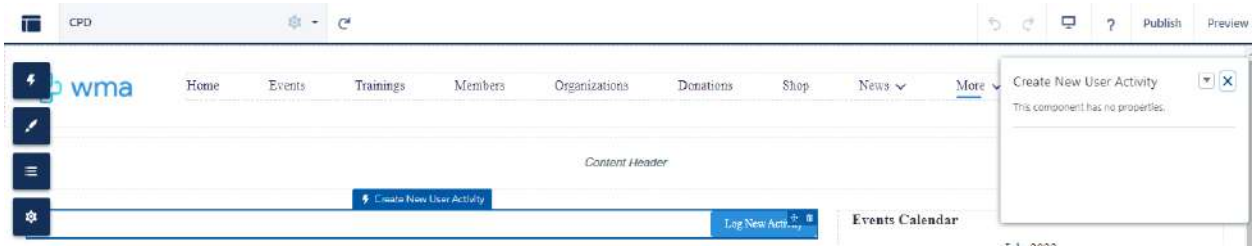
The component has no properties.

Create New User Activity Component

The component is used on the same page as the CPD component and allows site users to log CPD activities.

Add the component to the page:

- On the “CPD” page, click on the components tab to find the Create New User Activity component in the drop-down list, and drag it to the page canvas.
- The component has no properties



Components’ Functionality on Site

CPD Objectives

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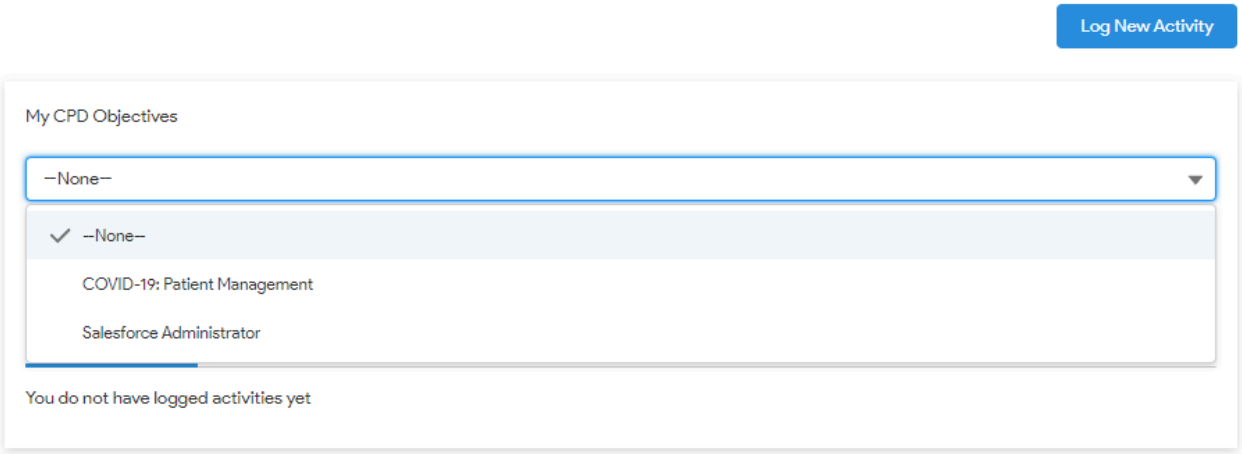
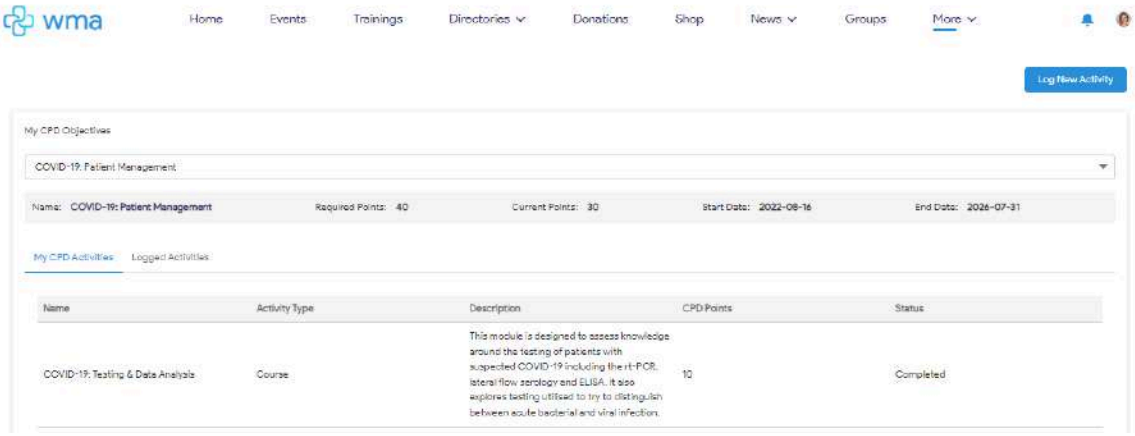
Go to the CPD page. Click on the picklist field to see the existing objectives.



CPD Activities

Click on any objective to see activities assigned to it.



Here your members can see:

- My CPD Objectives
    - Displays a drop-down list of active CPD objectives
- Name
    - Displays the name of the selected on the picklist objective; click to open the detail page

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- Required points
    - Number of points a member needs to earn to complete the objective
- Current points
    - Number of points already earned by a member
- Start Date
    - Start date of the CPD objective
- End Date
    - End date of the CPD objective
- My CPD Activities tab
    - List of all activities assigned to the current objective
    - Displays data from the CPD Activity: Name, Activity Type, Description, CPD Points, Status (marked as “Completed” when logged by user)
    - Displays records by alphabetical order of the Title
- Logged Activities
    - List of all activities logged by a member is displayed under the tab
    - To access the details of the logged activity record, click on the title of the activity
    - To access the details of the logged activities’ records, set up the CPD User Activity object page (described below)
    - Activities are sorted by Activity Taken Date

Logging New CPD Activity by Member

The site member clicks the “Log New Activity” button.

Filling in the form:

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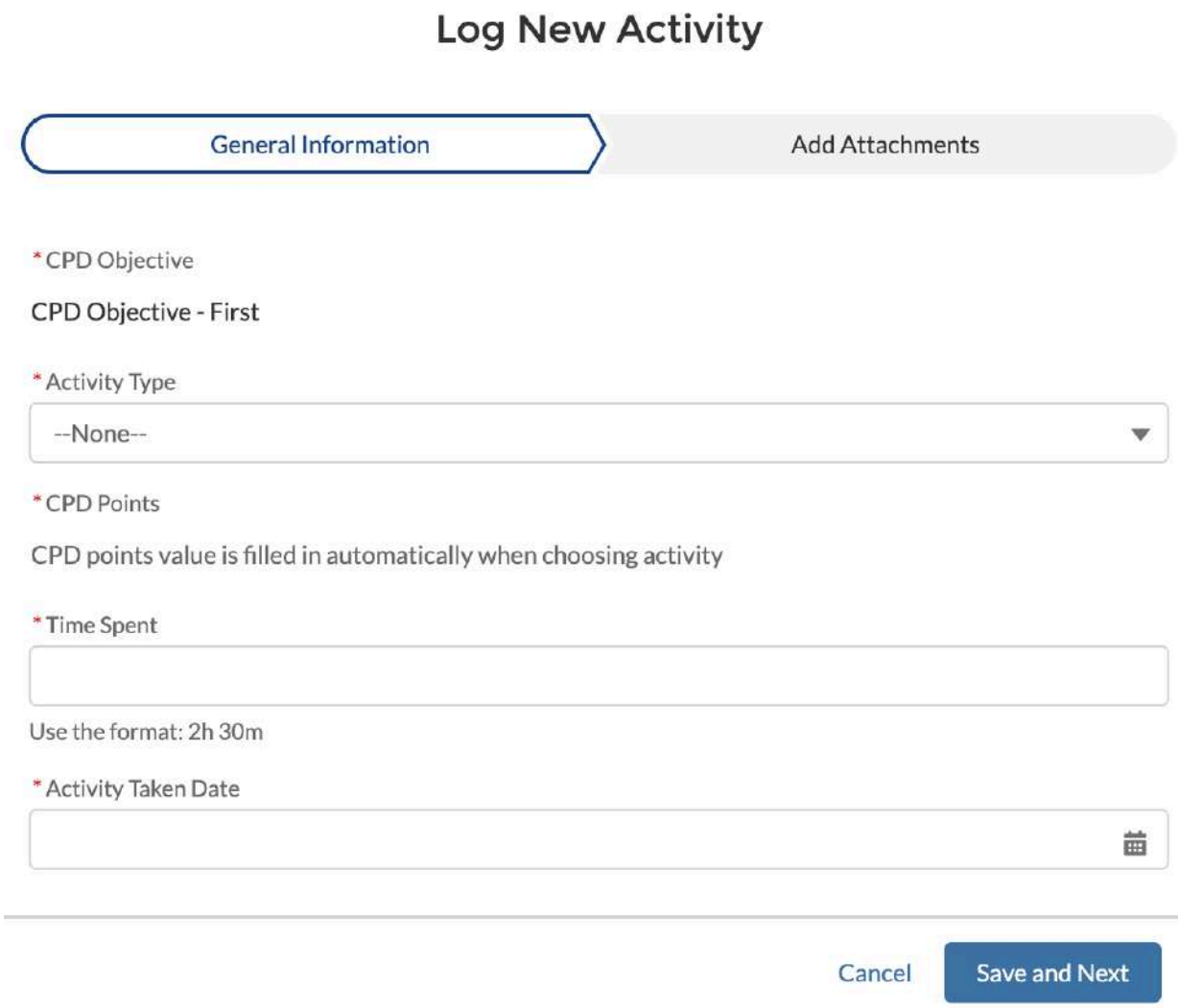

- CPD Objective – required field
    - Fills in automatically if CPD Objective was selected on the component before clicking the “Log New Activity Button”
- Activity Type – required field
    - Select activity type from the picklist
- CPD Points – required field
    - CPD points value is filled in automatically when choosing the activity

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- Time Spent – required field
    - Fill in the period of time spent on the activity in the following format: 2h 30m
        - Users can fill in hours and minutes only
        - Users will be able to fill in less than 24h in sum
        - Users won't be able to fill in 0h or 0m
- Activity Taken Date – required field
    - Choose the date when the activity was finished

Add an attachment if needed (pdf, jpeg, odt, png, doc, docx) and click Save.

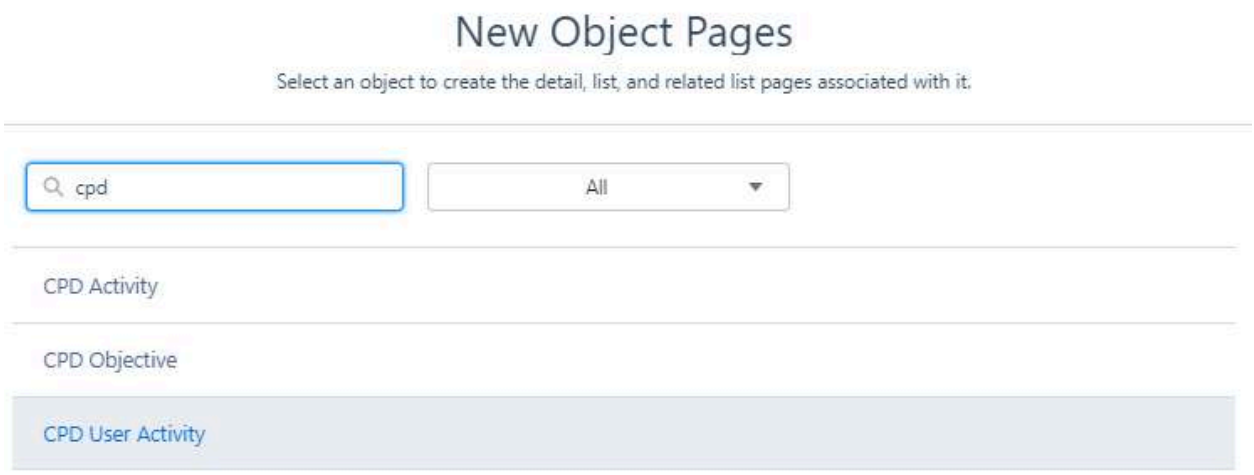
Note The "Log New Activity" button is inactive, if no activities can be logged for that CPD Objective.

"CPD User Activity" object page

In the Experience Builder, create a new object page and add it to the navigation menu.

To create an object page, go to:

Pages menu – New page – Object page – CPD User Activity – Create.



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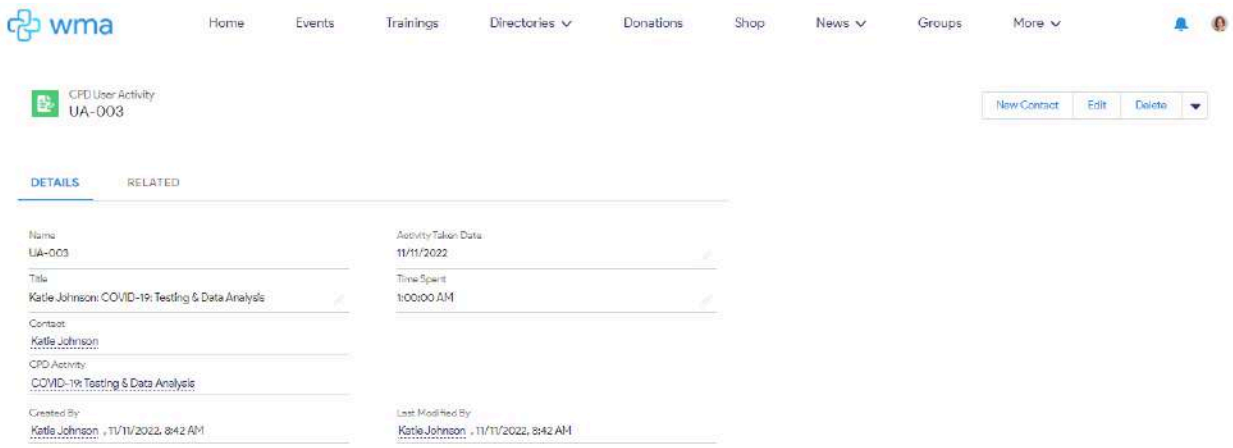
The page contains the standard Salesforce object component that displays the details of the members' logged activities.



The page can be accessed from the Logged Activities tab on the CPD component by clicking on the title.

Set Up User Profile Page

Setup the user profile page as described below.

We provide two options: using the standard User Profile Detail component or using our custom Account and Contact Information components for displaying account and contact fields on the User Profile page instead of user object fields.

User Profile Detail Component

Option One: display user object fields.

We suggest deleting the existing "User Profile" component and using the 3 columns, 1:2:1 ratio page layout to be able to place the "Membership Subscriptions" component nicely on the page. See the example of the configuration below.

Please drag and drop the User Profile Detail component in the middle of the content section to display user details.

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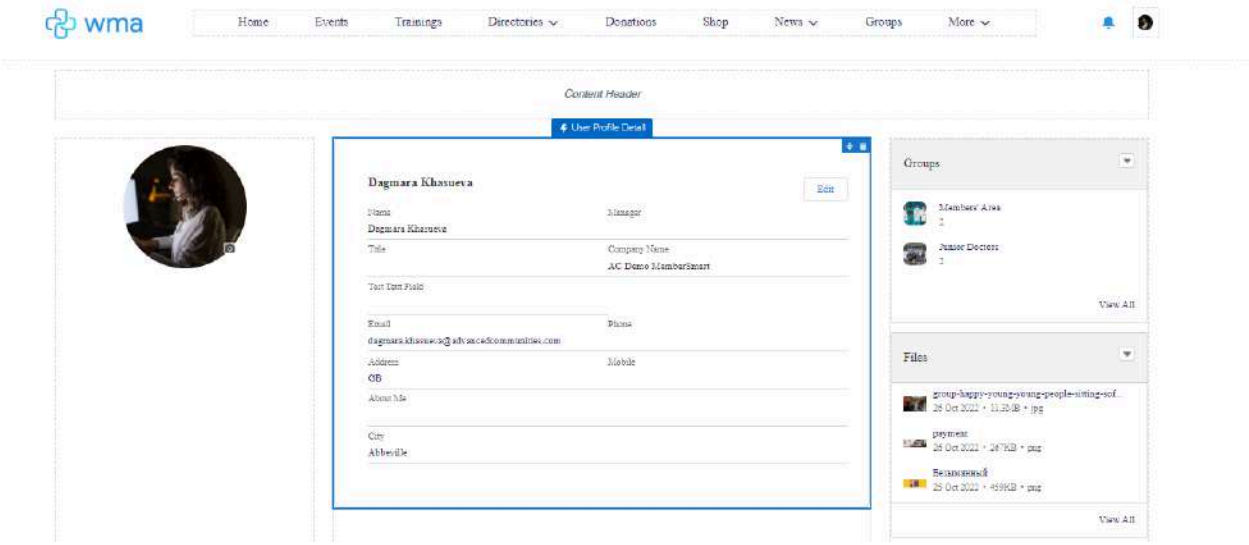

Contact Info Component

Option Two: display contact (and/or account) object fields.

Delete the existing “User Profile” component and select the 1:2:1 ratio page layout to be able to place the “Membership Subscriptions” component nicely on the page. See the example of the configuration below.

Please drag and drop the Contact Info component in the middle of the content section to display contact details.

The component should be used on the Experience Cloud site on the User Profile, Contact and Membership Subscription Detail pages only.

The component ensures data security by hiding the displayed information for other users even if the external OWD settings are other than Private.

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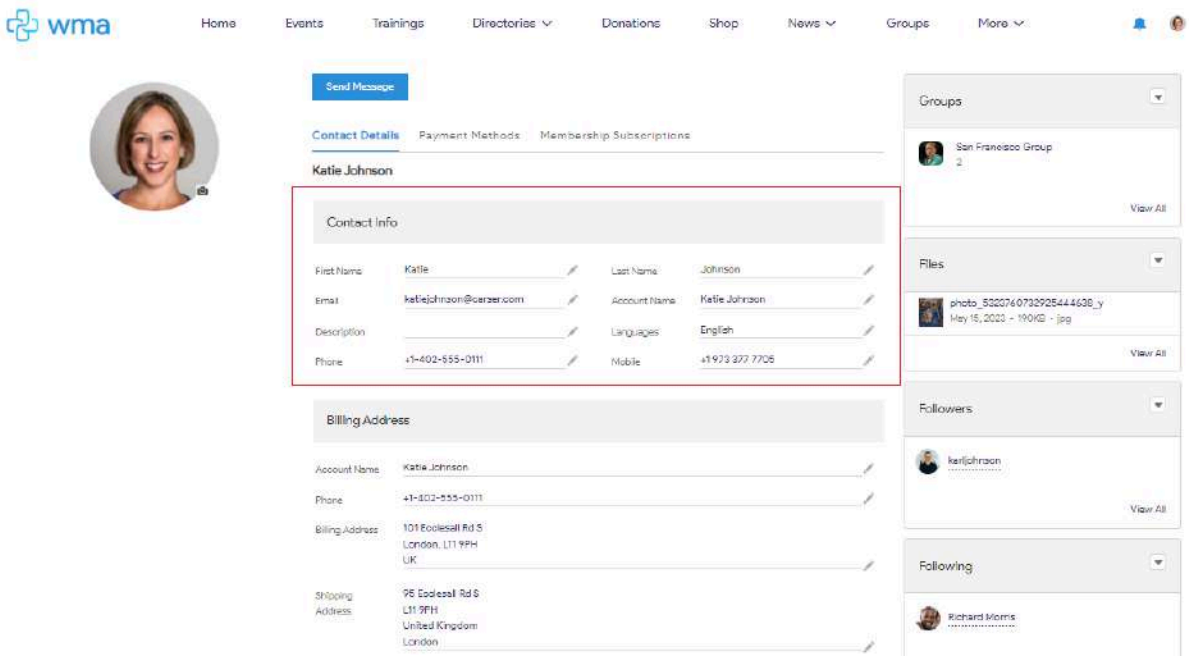

Note We suggest using a standard Salesforce “Tabs” component for organizing your User Profile page. Also, you can create separate tabs where you could put the Payment Methods component, Membership Subscriptions component, etc.

Admins can define what fields should be displayed on the component by creating a field set on the contact object. We provide the default field set. To update the existing fieldset or create a new one, go to Setup – Object manager – Contact – Field Set – New.

Contact fields edited by members on site are automatically updated internally on their contact records.

The component has the following properties:

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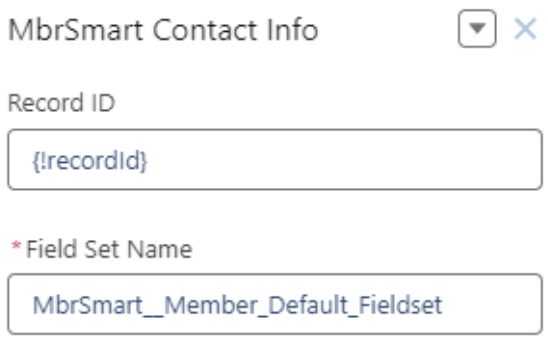
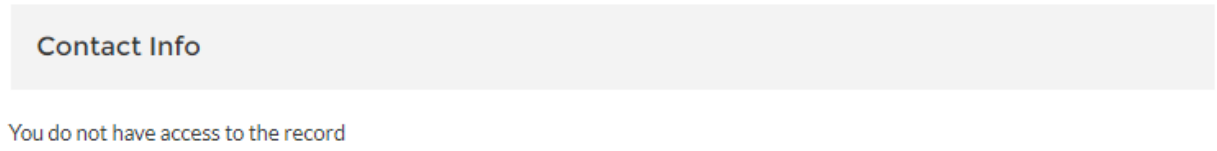


Record ID - Leave the default value

Field Set Name - API name of the fieldset that defines what fields to display on the component

The Contact Info component is also a part of the Membership Manager component. As an admin, you decide whether to display the section on both User Profile and Membership Manager pages or not.

If users lack access to contact object, the message 'You do not have access to the record' will be displayed on the component. The same message is displayed in Builder for admin users.



Account Info Component

The Account Info component can be used for displaying account fields on the User Profile page.

The component should be used on the Experience Cloud site on the User Profile, Account and Membership Subscription Detail pages only.

The component ensures data security by hiding the displayed information for other users even if the external OWD settings are other than Private.

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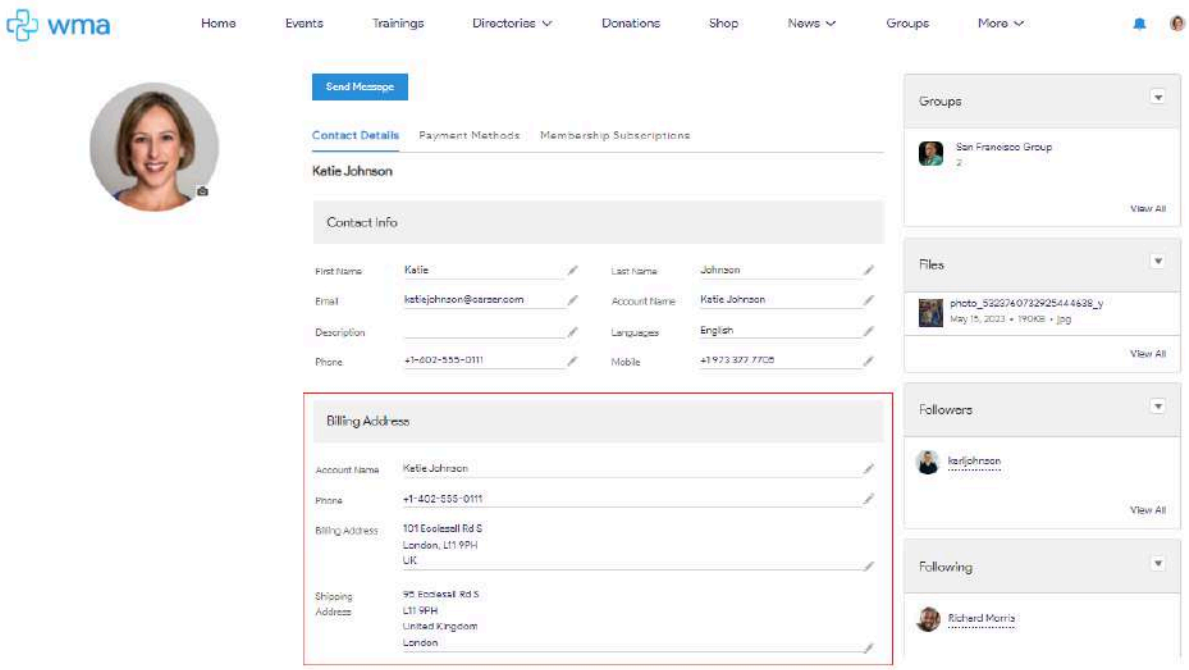
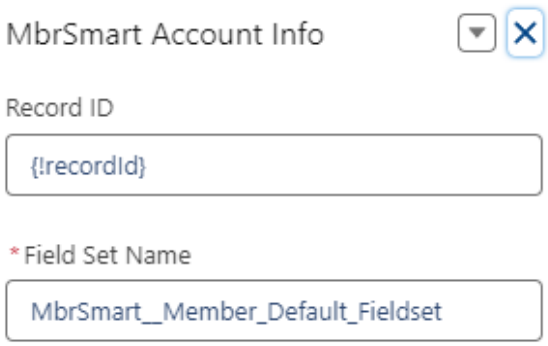


Account fields edited by members on site are automatically updated internally on their account records.

Admins can define what fields should be displayed on the component by creating a field set on the account object. We provide the default field set. To update the existing field set or create a new one, go to Setup – Object Manager – Account – Field Set – New.

The component has the following properties:



Record ID - Leave the default value

Field Set Name - API name of the fieldset that defines what fields to display on the component

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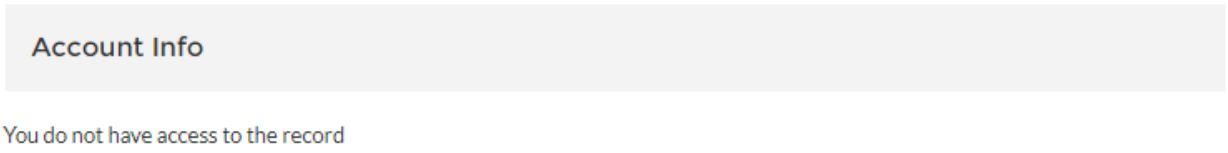
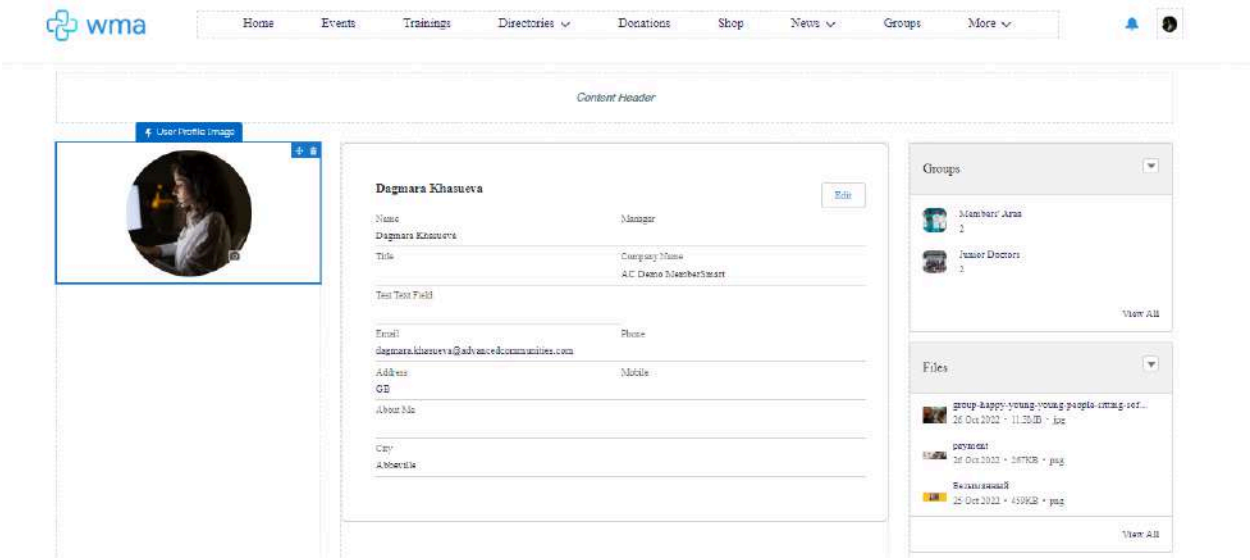
The Account Info component is also a part of the Membership Manager component. As an admin, you decide whether to display the section on both User Profile and Membership Manager pages or not.

If users lack access to contact object, the message 'You do not have access to the record' will be displayed on the component. The same message is displayed in Builder for admin users.



User Profile Image Component

We recommend adding a standard User Profile Image component to the User Profile page to display the image of the user.



User Profile Related List Component

We recommend adding a standard User Profile Related List component to the User Profile page to display the related groups, files, followers, etc.

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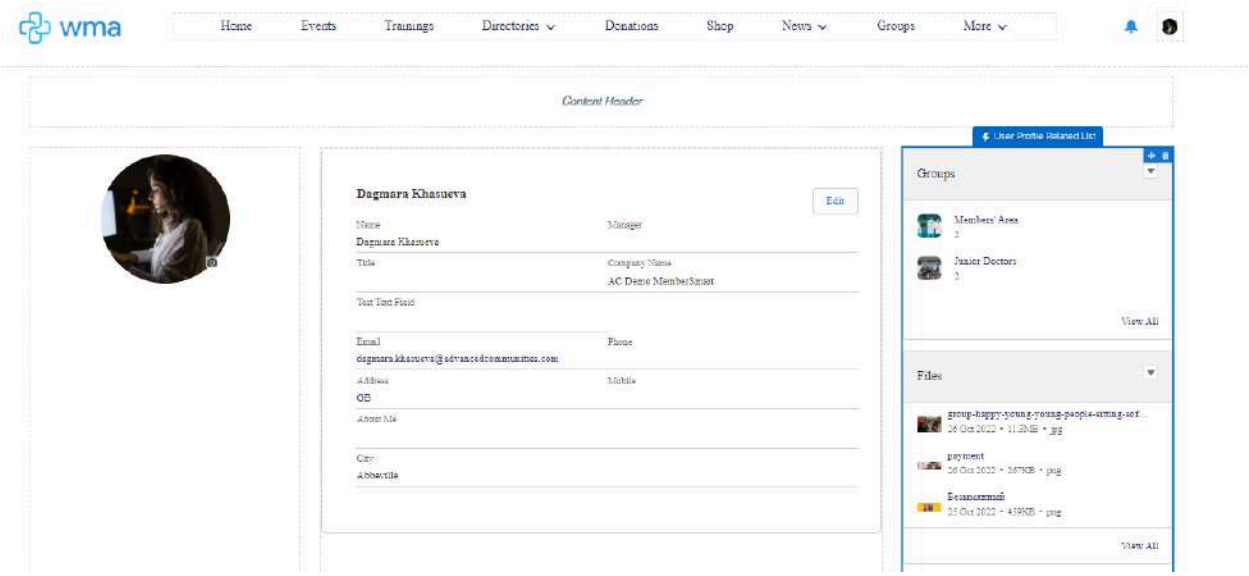
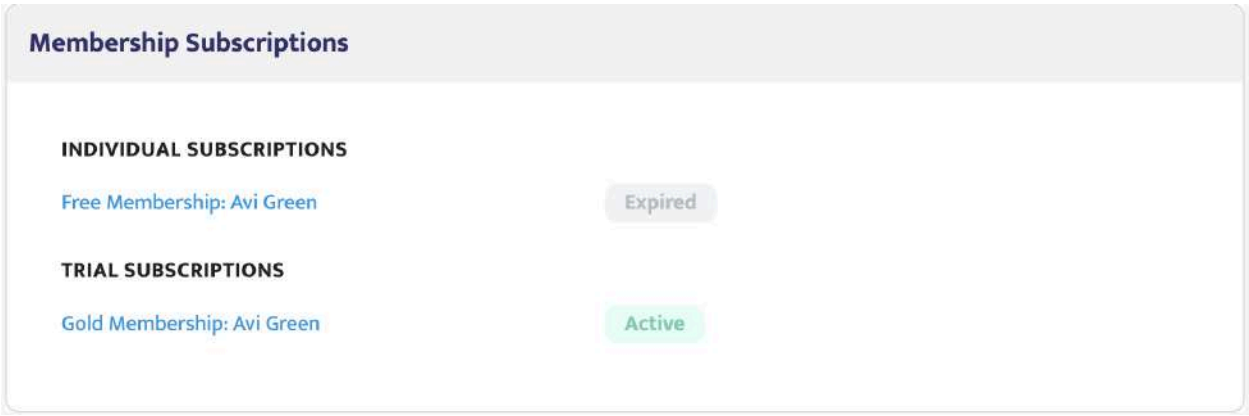


Membership Subscriptions Component

Drag and drop the component under the User Profile Related List component.

The component displays the users' existing membership subscriptions and their current status.



The membership subscription records are clickable. By clicking the link, the user can be transferred to the Membership Management (or Membership Details) component.

When there are no subscriptions, users see the message: "Currently there are no membership subscriptions".

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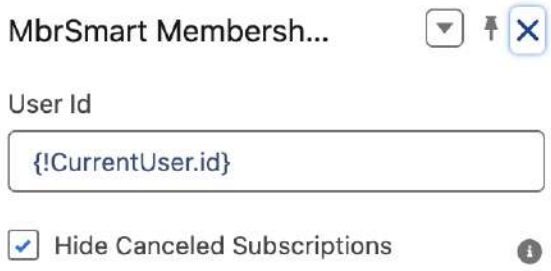
If the OWD setting on the Membership Subscription object is Private, the component is hidden from the community if the user is not the owner.

The component has the following properties:



Record ID - Leave the default value or configure using the variables

Hide Canceled Subscriptions - Enable to hide the subscriptions with Status = “Canceled” from the list

Payment Methods Manager Component

With this component, community users can manage their existing payment methods and create new ones from site when using the app with native payments. The component should be used on the Experience Cloud site on the User Profile, Contact and Membership Subscription Detail pages only.

Drag and drop the component to the page and publish. We suggest using a standard Salesforce “Tabs” component for organizing your User Details page.

The component ensures data security by hiding the displayed information for other users even if the external OWD settings are other than Private.

Note Also, you can create separate tabs where you could put the Contact Info component, Membership Subscriptions component, etc.

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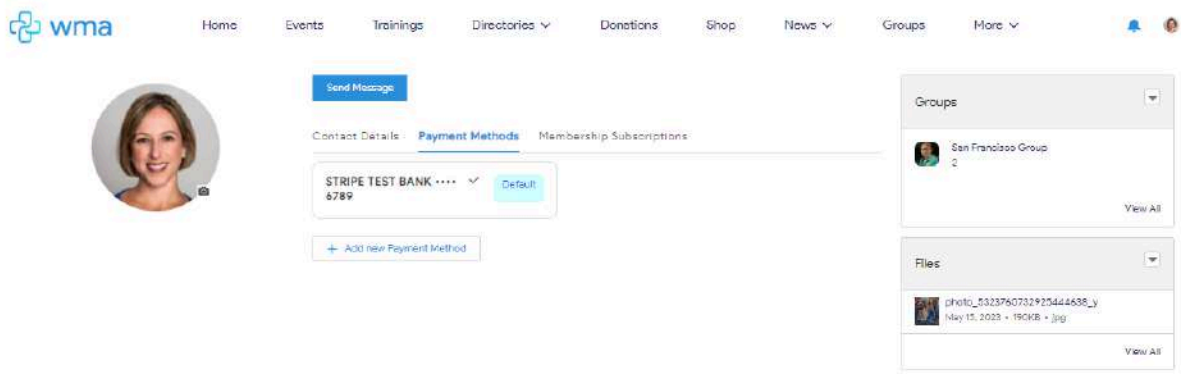
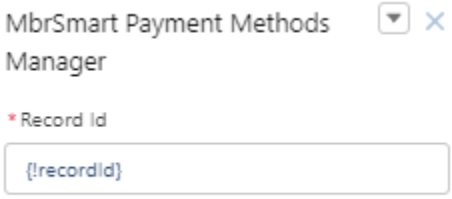


The component has the following property:



Record id – required field, leave the default value

With the component, a user can:

- Create a payment method (Card, ACH)
- See the default method
- Mark another payment method as default
- Delete payment method (if the payment method is not marked as default)

Component behavior:

- It's crucial to be aware when there are no stored payment methods in the system - this prevents the setup of recurring payments. The message below will be

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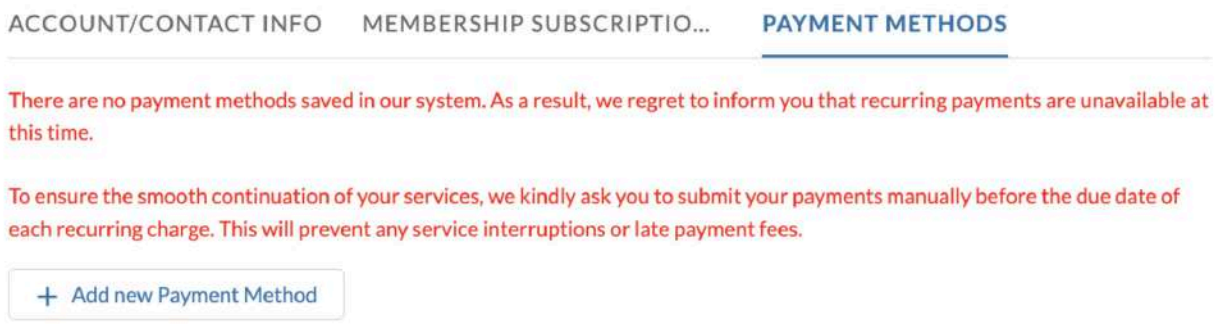
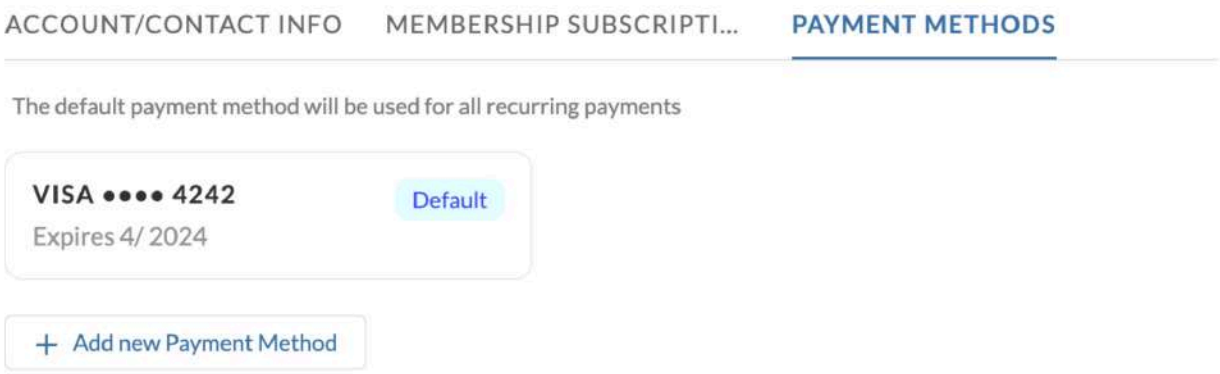
displayed to site users when there are no payment methods in the system



- Message displayed to let users know their payment method will be used for recurring payments



Adding New Payment Method

Note Payment method cannot be created from the internal environment.

1. Click Add New Payment Method button.
2. A pop-up window with the component is opened:
3. Select Card, ACH Direct Debit or Bacs option. Please note that ACH or Bacs option is displayed according to the currency selected on the org.

STANDARD PAYMENT METHOD (Card Payment Method)

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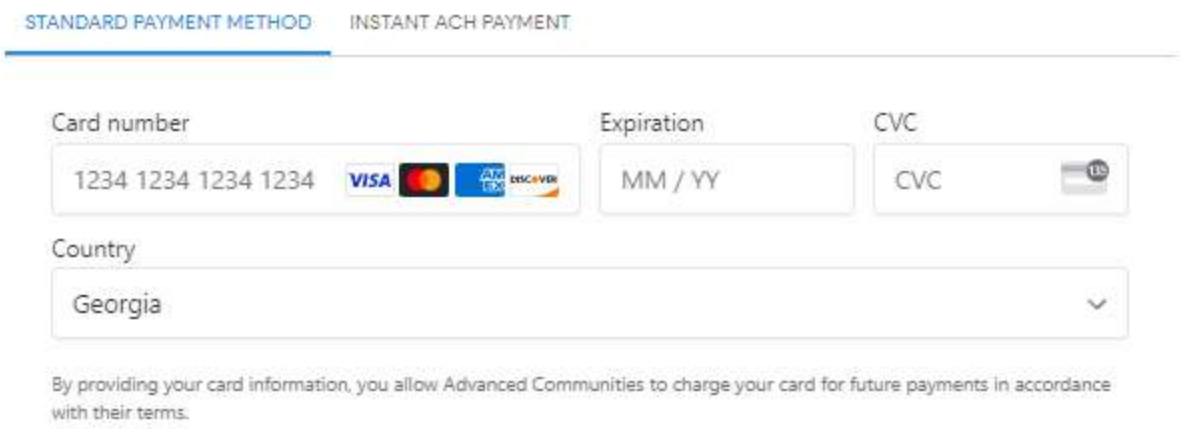

Fill in:

- Card number
- Expiration
- CVC
- Country
- Save

INSTANT ACH PAYMENT (ACH Direct Debit Payment Method)

We use Plaid for connecting your bank account.

The tab will be hidden If the Plaid Settings are not filled in MemberSmart Settings.

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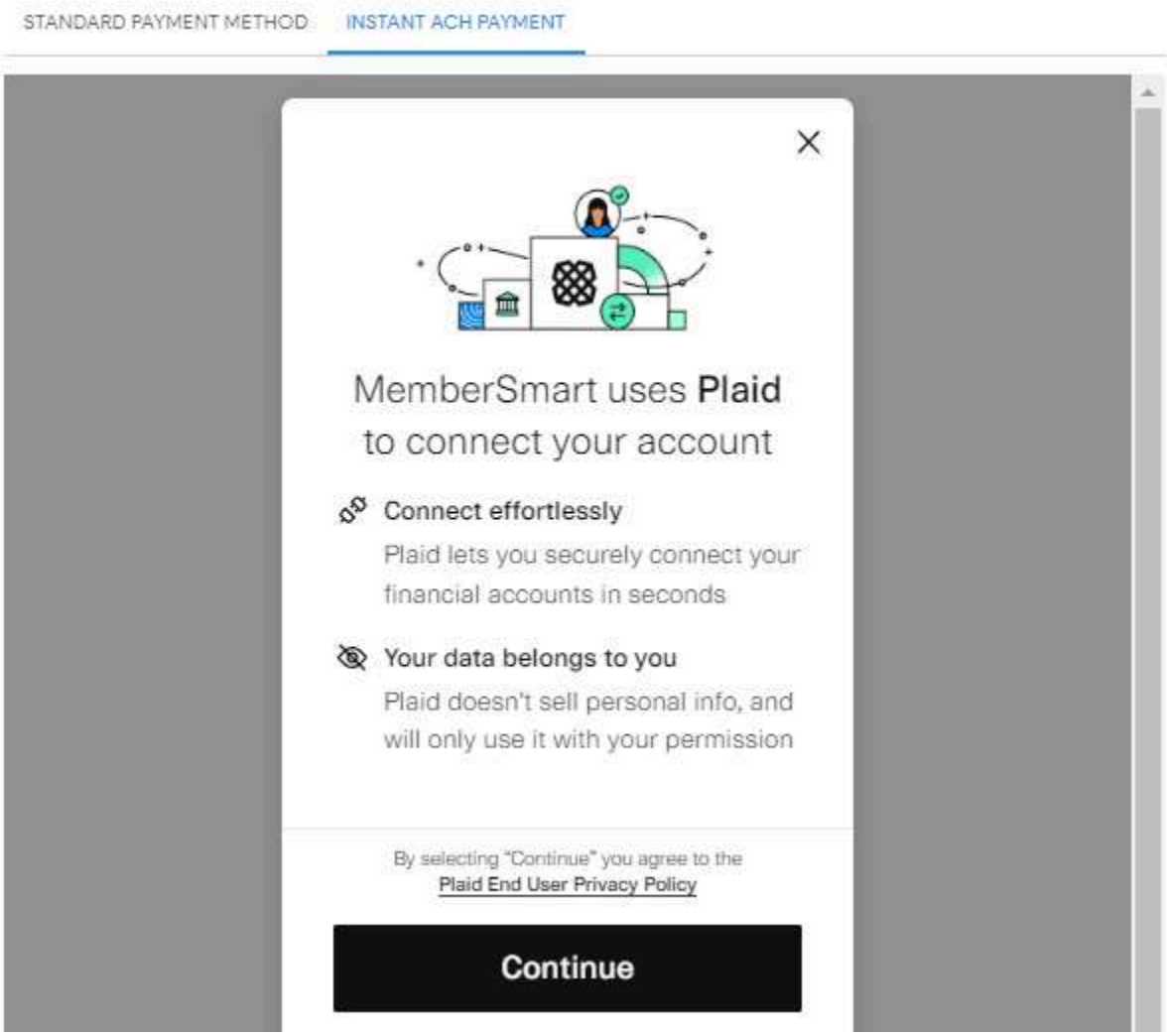
- Go to the INSTANT ACH PAYMENT tab



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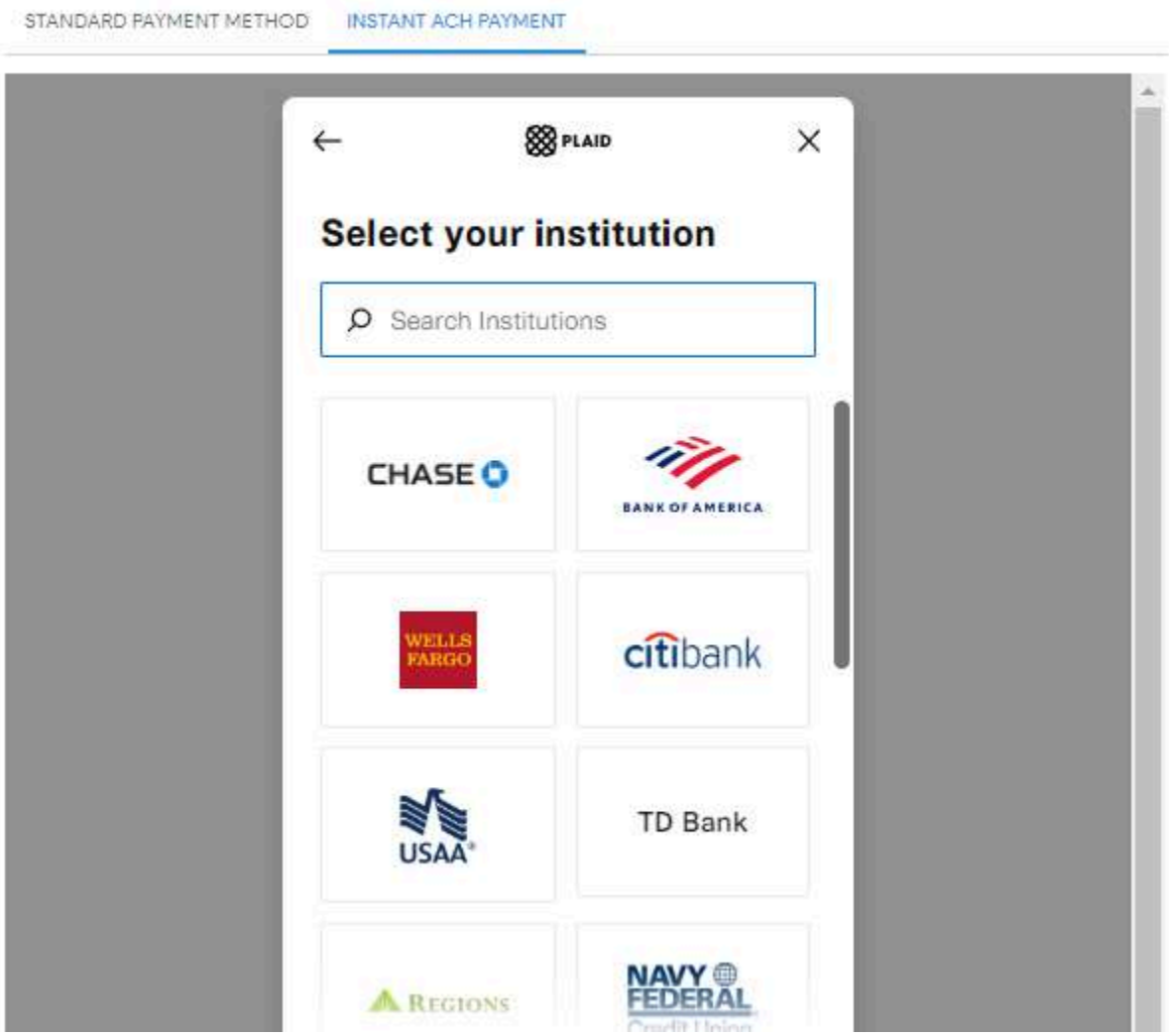
- Select your Bank



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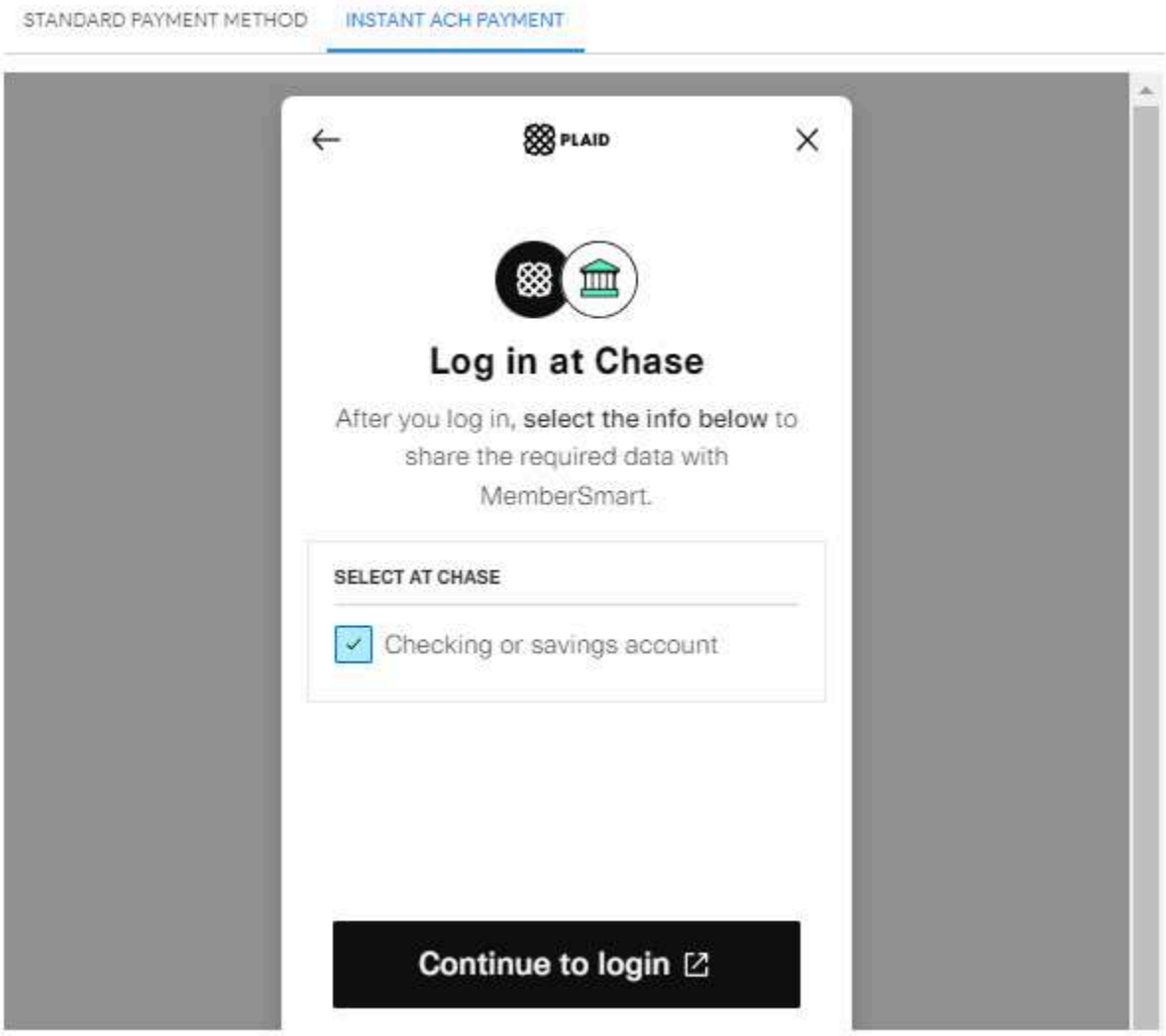
- Authenticate



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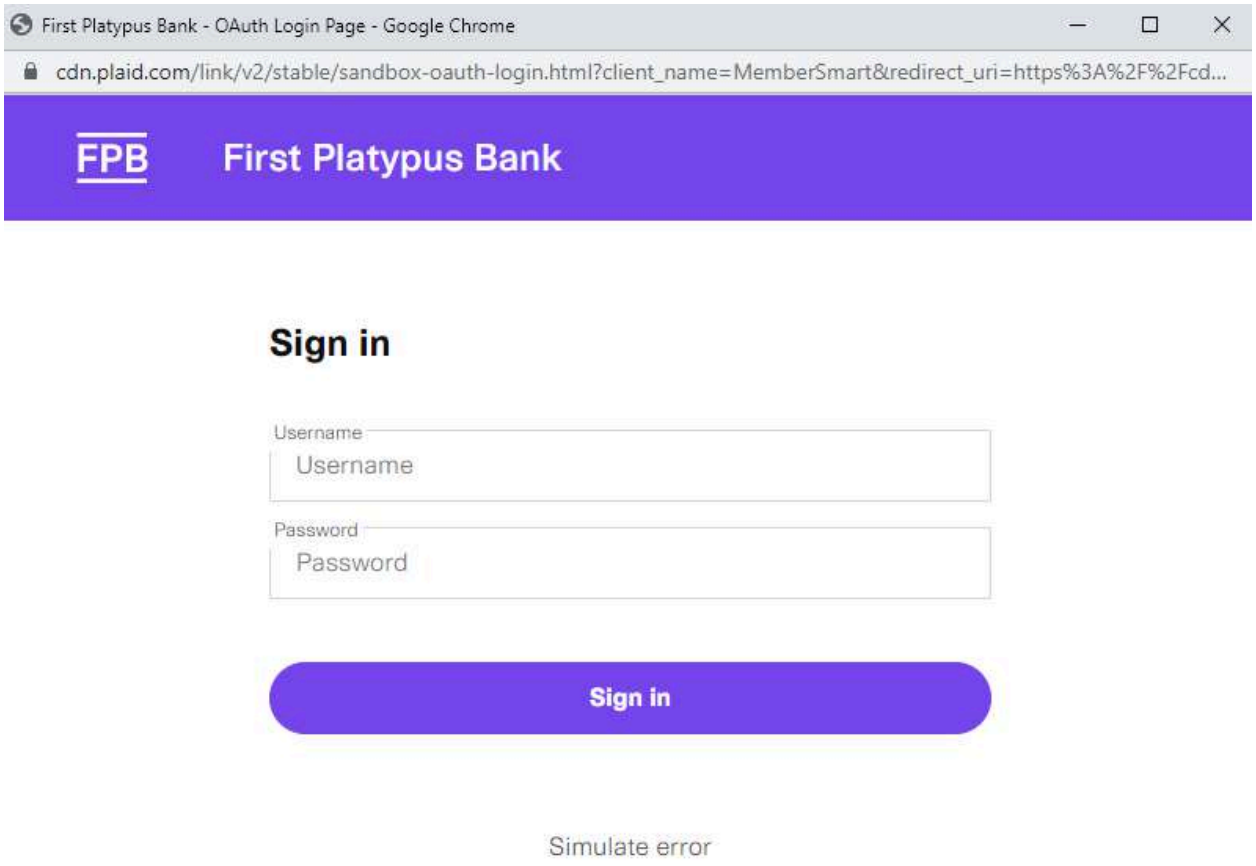
- Go through the Sign In process



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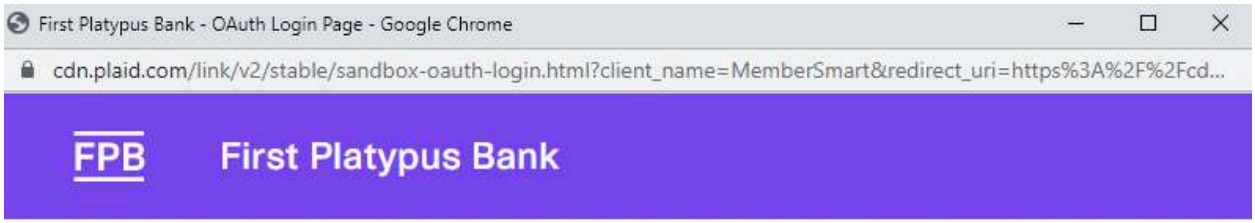

Verify your identity

How should we get in touch?

Tell us how

Mobile

Get code

Verification

Enter the security code sent to ••• ••• 1111

Code

Code

Submit

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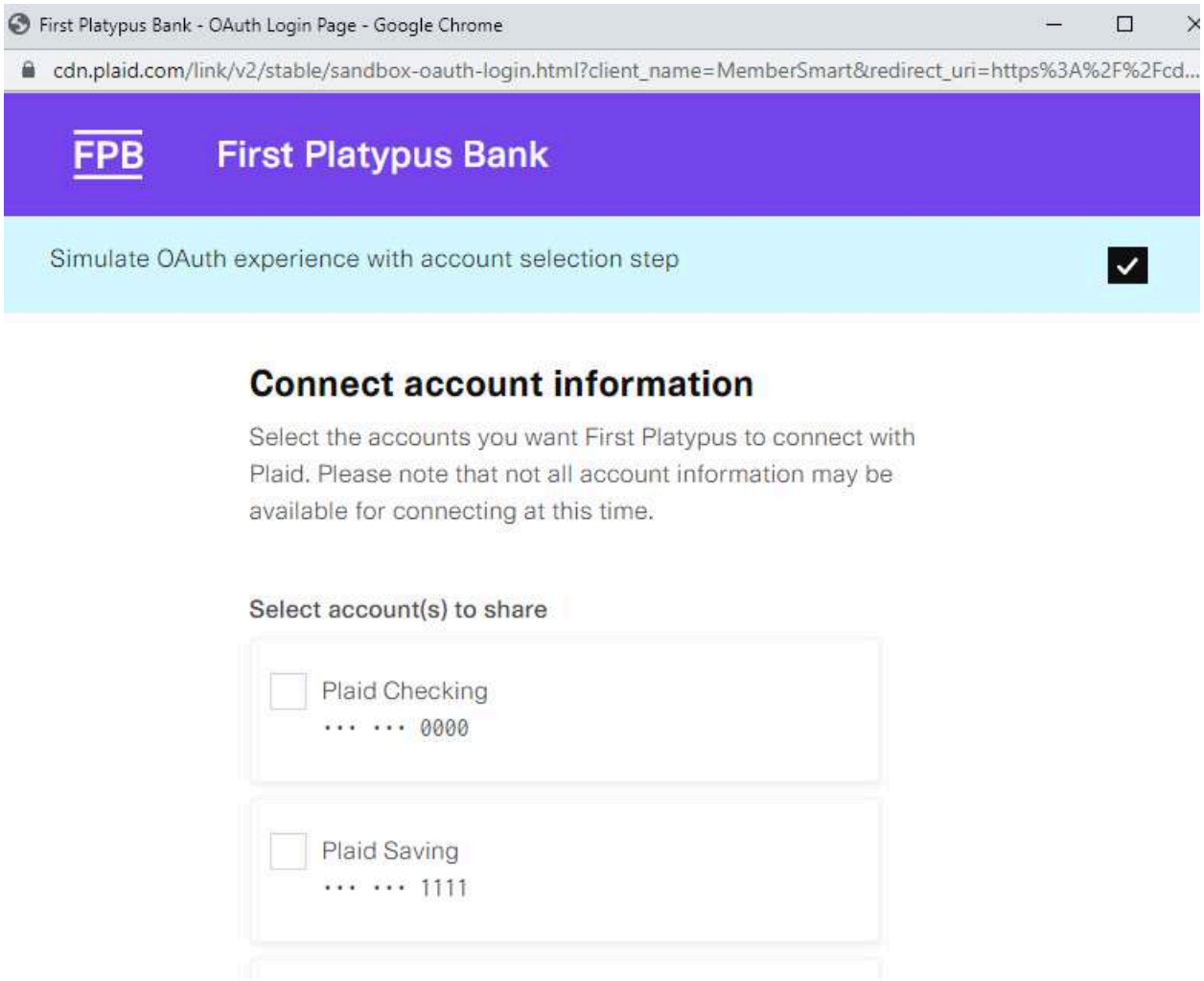
- Connect account information. Select the accounts you want to connect with Plaid



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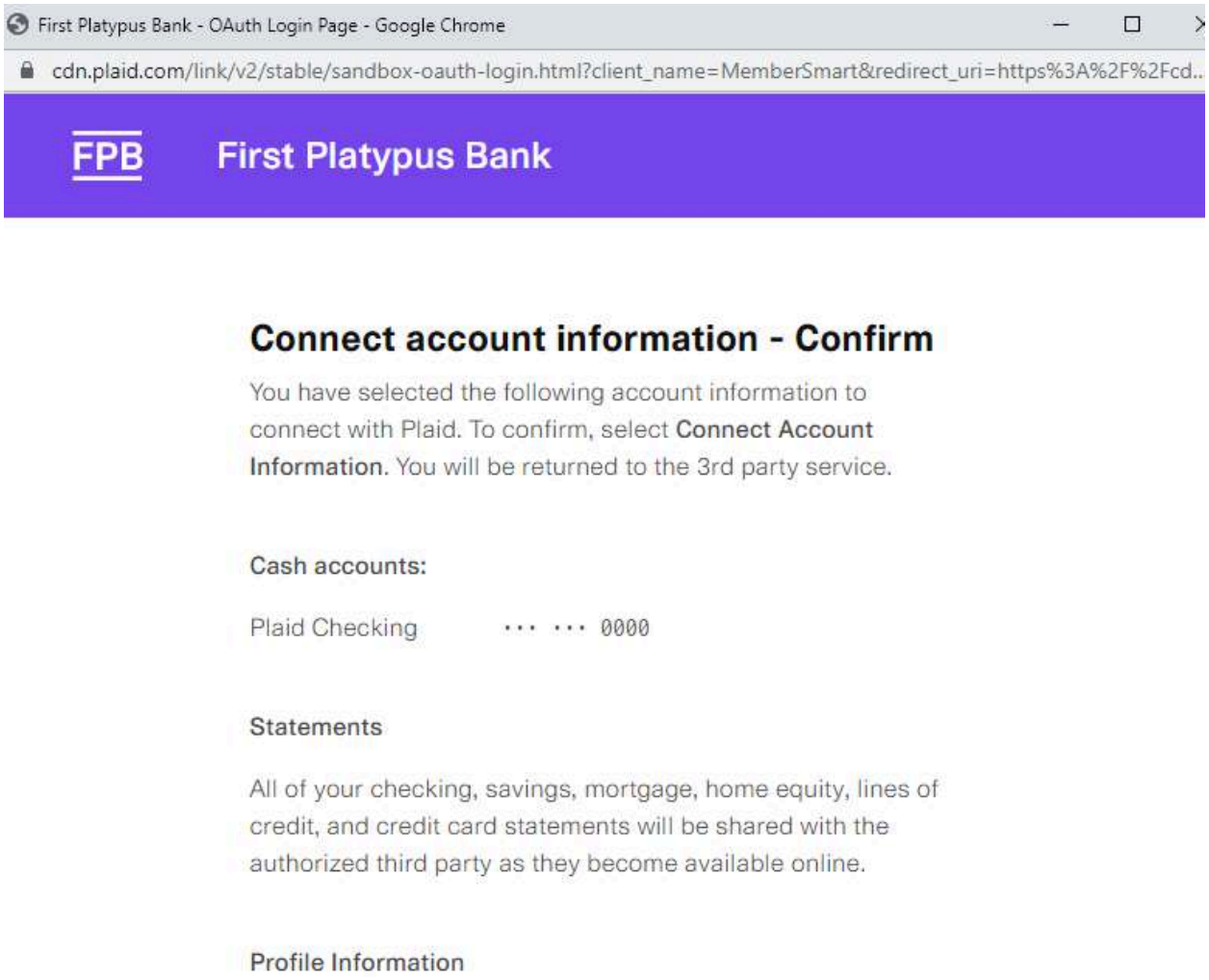
- Confirm



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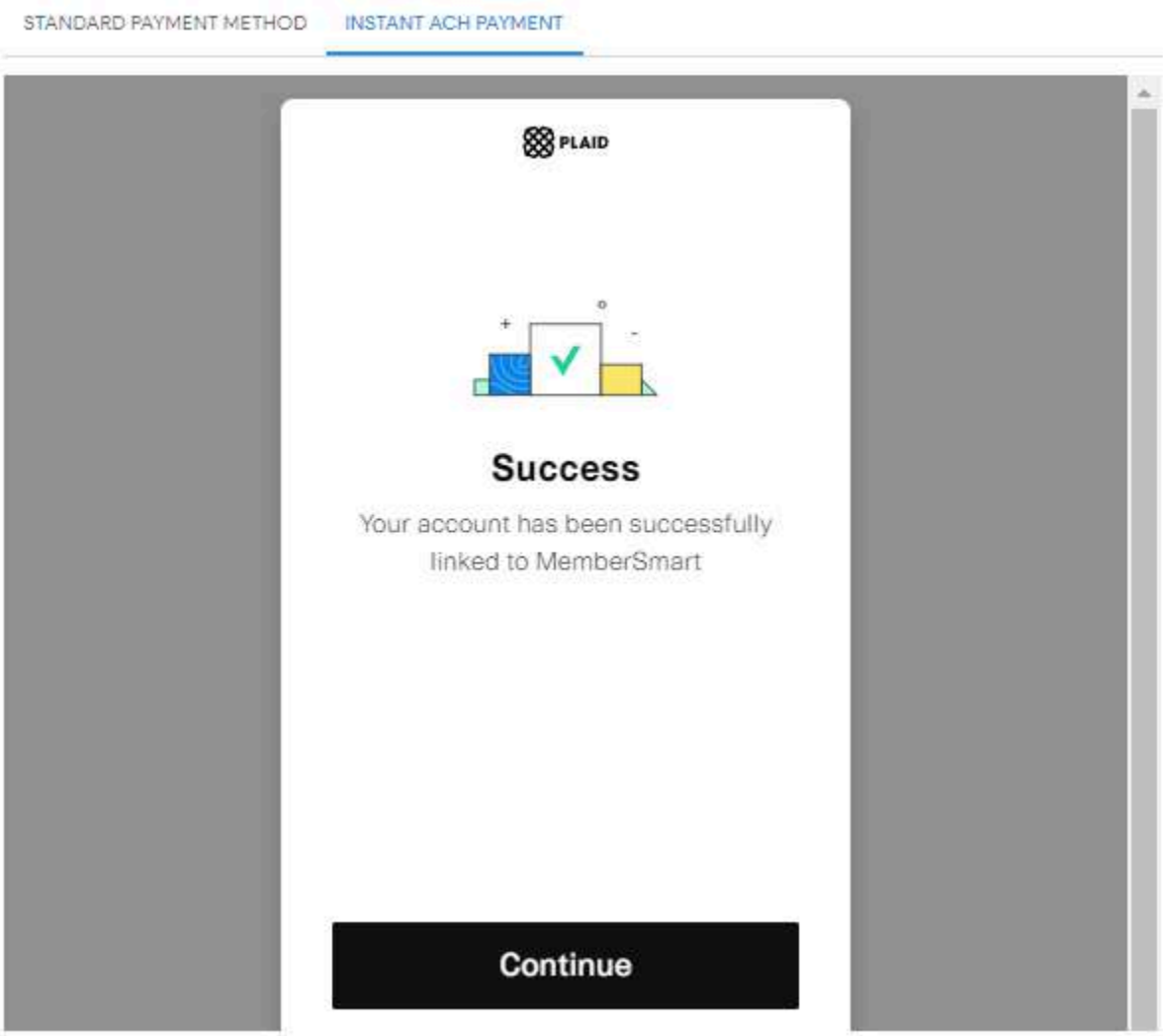
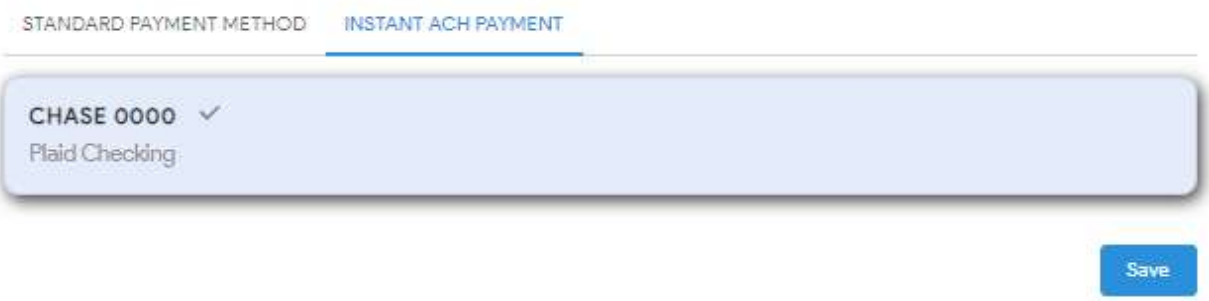
- See success message



- Select your account



- Save

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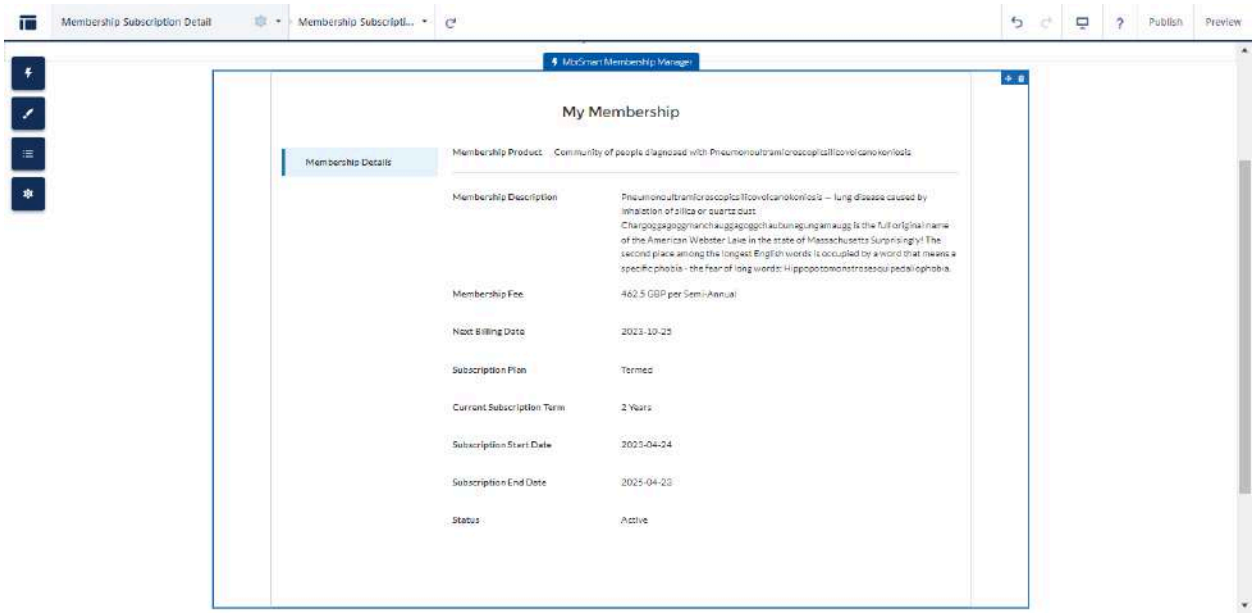
Note When you delete a payment method from Salesforce environment, it is deleted in Stripe as well.

To assist users, we display a message when no payment methods are added to the system, informing them that this will affect payment processes. Similarly, when users have saved payment methods, we provide a message to help them understand that the default one will be used for recurring payments.

Set Up Membership Manager Page

With the Membership Manager and Membership Details components, members can manage their membership subscriptions on site.

In the Experience Builder, create a new object page for the **Membership Subscriptions** object. Go to the Membership Subscription Detail page, delete all the standard components and drag the Membership Manager component to the page.



Membership Manager Component (Deprecated)

The component displays the two sections: Membership Details and Membership Billing.

Please note that the Membership Manager component will not receive further updates or development in future releases. For displaying membership details,

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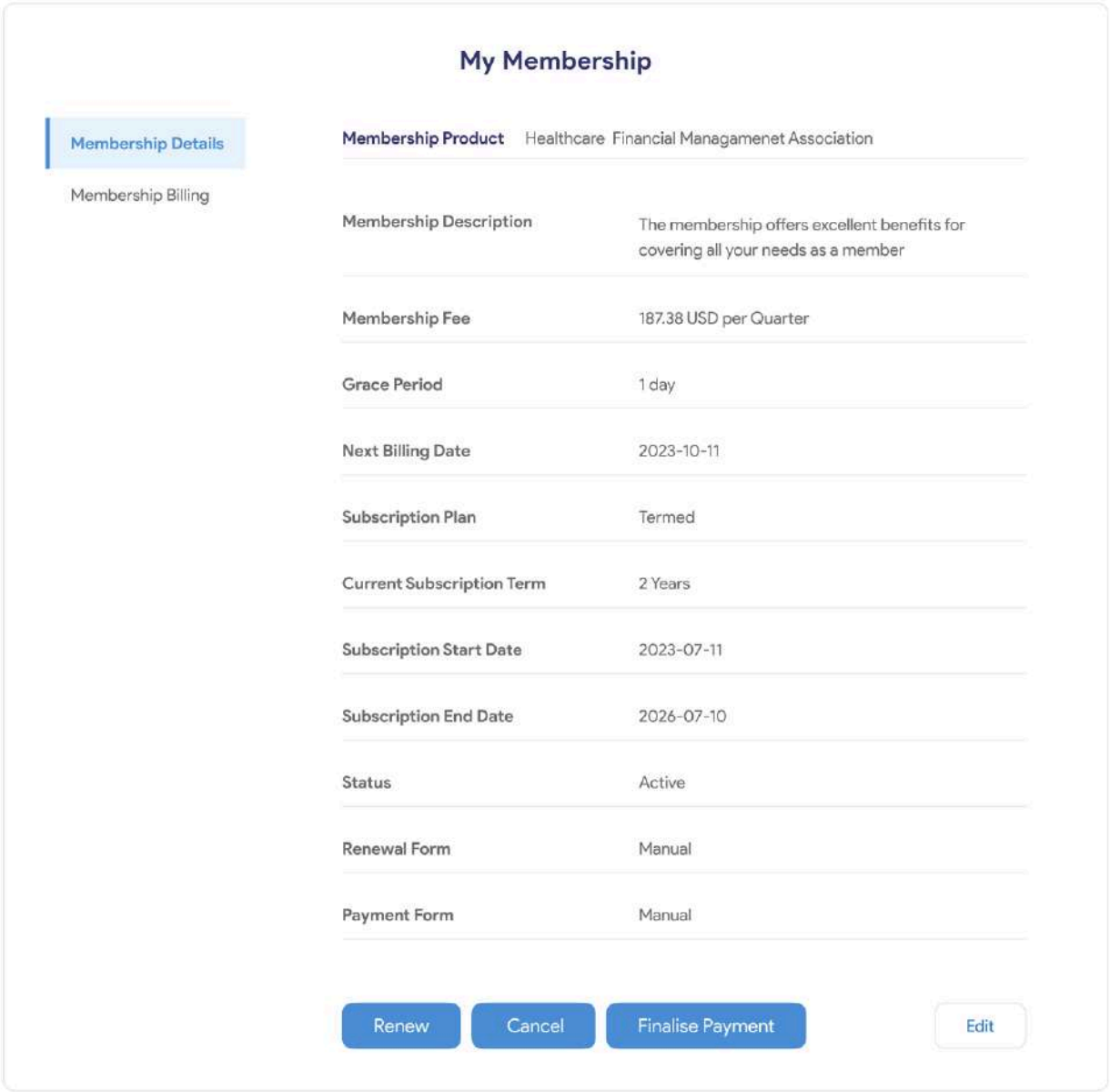
we recommend utilizing the Membership Details component. This component, when combined with others, offers an efficient solution.

Membership Details



In the Membership Details section, a user can see:

- Name and description of the membership

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- Membership fee
  Data not displayed if the subscription is fully paid
- Next billing date
  The field displays data from the Start Date field of the second Instalment in order.
  Data not displayed if the subscription is fully paid
- Subscription start date
  Date when the subscription starts
- Subscription end date
  Date when a subscription ends
- See the grace period
  For how many days a user can use the membership benefits without providing a payment
- Instalment payment period
  Displays the number of days designated for members to complete payments for their instalments
- Status of the membership subscription
- Renewal form
  The value selected by a user when registering as a member (automatic or manual)
- Payment form
- Membership length
- Subscription plan
  The value selected by a user when registering as a member
- Renew, Cancel, Finalize Payment, and Edit buttons
  The buttons are not displayed if there is no cancellation/renewal/payment flow api name defined in the properties. More details:
    - Renew button is displayed:
        - if the *'Renew Subscription Flow API Name'* property is filled.
        - if the subscription has the following status: *'Active'*.

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        - if the user has *Create* access to the *Subscription* and *Subscription Term* objects.
        - if it is the current user's subscription.
        - if the *'Hide the "Renew" button for users with auto-renewals option'* is false and the Subscription Renewal Form field is not equal to Auto-Renewals.
        - if all instalments on the current subscription term have the status 'Closed Collected'.
        - based on the "Show the 'Renew' button when current term is not fully paid" checkbox:
            - If enabled, the Renew button is shown even when unpaid instalments exist (Status ≠ 'Closed Collected').
            - If disabled (default), the button is hidden if any unpaid instalments exist.
    - Cancel button is displayed if:
        - if the 'Cancel Subscription Flow API Name' property is filled.
        - if the subscription has the following statuses: 'Active', 'Pending', or 'Suspended'.
        - if the user has Update access to the Subscription and Subscription Term objects.
        - if it is the current user's subscription.
        - learn more about the functionality here.
    - Finalize Payment button is displayed if:
        - if the *'Finalize Payment Flow API Name'* property is filled.
        - if the subscription has the following status: *'Pending'*.
        - If there are unpaid instalments, defined as: Is Closed = FALSE and (Is Expired = TRUE or Status = In Progress).
        - learn more about the functionality here.
    - Edit button:
        - To edit fields, the site user must have Edit access to the fields.
        - Editable fields include:
            - The Payment Form and Renewal Form fields (from field sets on Subscription/Term).
            - Any custom fields outside the managed package.

The Membership Details section allows you to display both default and additional fields for each membership. This functionality is customisable using field sets, enabling flexibility while ensuring key fields are always visible.

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The following fields are always displayed on the Membership Details component, regardless of their inclusion in field sets: *Title, Description, Membership Fee, Next Billing Date, Subscription Start Date, Subscription End Date*.

The following fields are part of the default fieldsets named “Membership Details Default Fieldset” on Membership Subscription and Membership Subscription Term objects: *Grace Period, Instalment Payment Period, Status, Renewal Form, Payment Form, Membership Length, Plan.*

On the Membership Details section of the Membership Manager component, when the description of the product is too long, the text is trimmed and the “show more” button is displayed.

- The text is trimmed after 300 symbols
- The “…” is added for the last three visible symbols
- The clickable “Show more” button is displayed
- The clickable “Show less” button is displayed

Note For your convenience, we provide the Membership Details section as a separate component.

Membership Billing

The Membership Billing section contains the Contact Info and Account Info components.

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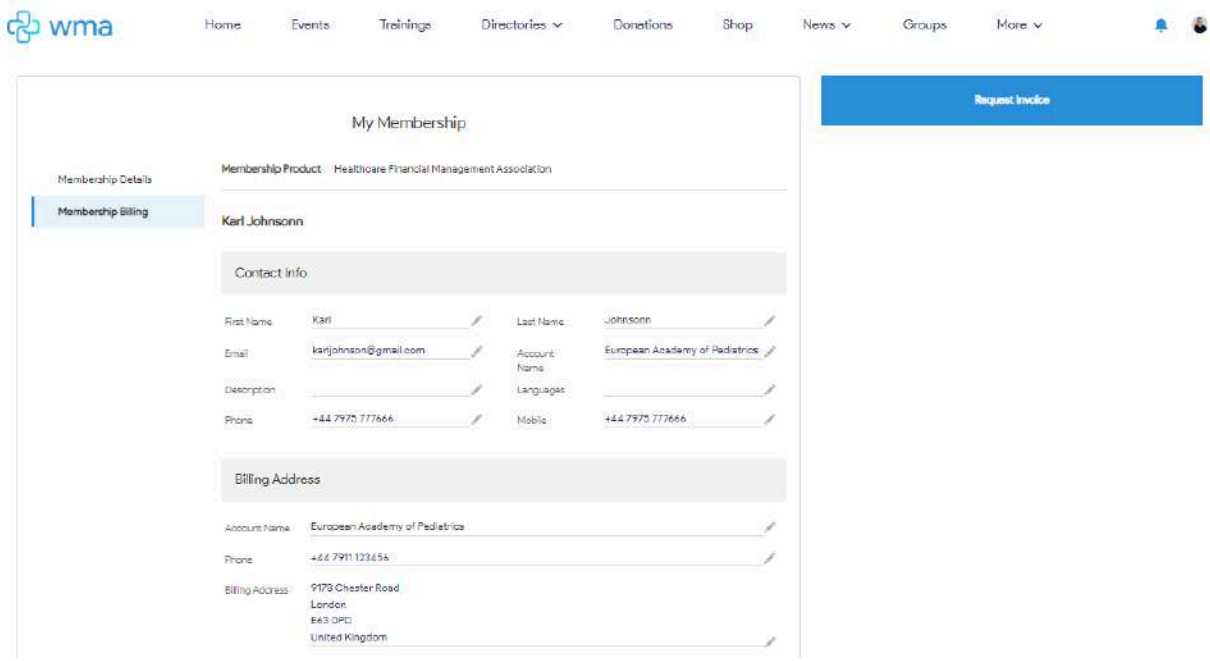

The component has the following properties:

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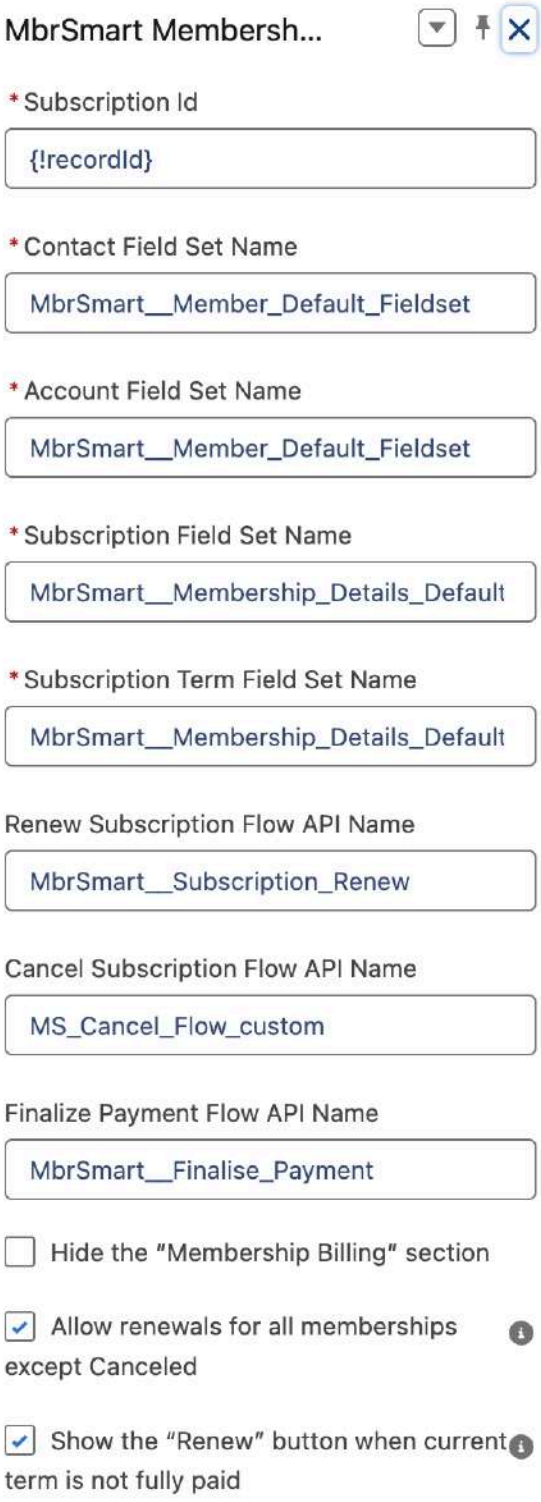

Subscription Id – text field
Leave the default value

Contact Field Set Name – add the contact fieldset API name

Account Field Set Name – add the account fieldset API name

Subscription Field Set Name – add the subscription fieldset API name to define which object fields to display

Subscription Term Field Set Name – add the subterm fieldset API name to define which object fields to display

Renew Subscription Flow API Name – add the renew flow API name

Cancel Subscription Flow API Name – add the cancellation flow api name (not provided by AC, please create the cancellation flow according to your organisation needs)

Finalize Payment Flow API Name – add the flow API name

Hide the "Membership Billing" section – enable the checkbox to remove the "Membership Billing" section from the component

Allow renewals for all memberships except Canceled – If enabled, members will see the Renew button if their subscription is in any status except Canceled and will be able to renew the membership

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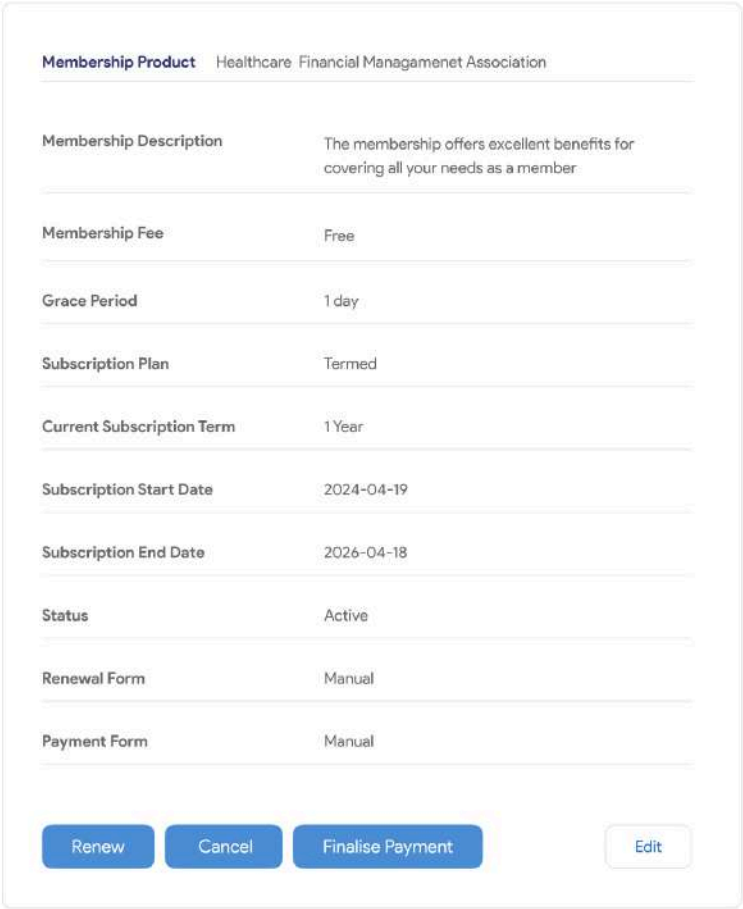
Show the “Renew” button when current term is not fully paid – Enable to show the ‘Renew’ button even if there are unpaid instalments on the current term

Renew, Cancel and Finalize Payment buttons are not displayed if the flow fields are blank.

We provide the Membership Manager component on our package that contains the membership details, membership billing information, but we also provide the mentioned components as a separate functionality – you can display those components on your User Profile page if you decide that it’s more convenient for your users.

Membership Details Component



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This component empowers members to conveniently manage their membership subscription details directly on the site. It mirrors the functionality of the Membership Details section within the Membership Manager component.

Please note that the behaviour is different for trial terms. More details here.

On the Membership Details component, a user can:

- See the name and description of the membership
- See the membership fee
  Data not displayed if the subscription is fully paid
- See the next billing date
  The field displays data from the Start Date field of the second Instalment in order.
  Data not displayed if the subscription is fully paid
- Subscription start date
  Date when the subscription starts
- Subscription end date
  Date when a subscription ends
- See the grace period
  For how many days a user can use the membership benefits without providing a payment
- Instalment payment period
  Displays the number of days designated for members to complete payments for their instalments
- Status of the membership subscription
- Renewal form
  The value selected by a user when registering as a member (automatic or manual)
- Payment form
- Membership length
- Subscription plan
  The value selected by a user when registering as a member

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- Renew, Cancel, Finalize Payment, and Edit buttons
  The buttons are not displayed if there is no cancellation/renewal/payment flow api name defined in the properties. More details:
    - Renew button is displayed:
      - if the *'Renew Subscription Flow API Name'* property is filled.
      - if the subscription has the following status: *'Active'*.
      - if the user has *Create* access to the *Subscription* and *Subscription Term* objects.
      - if it is the current user's subscription.
      - if the *'Hide the "Renew" button for users with auto-renewals option'* is false and the Subscription Renewal Form field is not equal to Auto-Renewals.
      - if all instalments on the current subscription term have the status 'Closed Collected'.
      - based on the "Show the 'Renew' button when current term is not fully paid" checkbox:
        - If enabled, the Renew button is shown even when unpaid instalments exist (Status ≠ 'Closed Collected').
        - If disabled (default), the button is hidden if any unpaid instalments exist.
    - Cancel button is displayed if:
      - if the 'Cancel Subscription Flow API Name' property is filled.
      - if the subscription has the following statuses: 'Active', 'Pending', or 'Suspended'.
      - if the user has Update access to the Subscription and Subscription Term objects.
      - if it is the current user's subscription.
      - learn more about the functionality here.
    - Finalize Payment button is displayed if:
      - if the *'Finalize Payment Flow API Name'* property is filled.
      - if the subscription has the following status: *'Pending'*.
      - If there are unpaid instalments, defined as: Is Closed = FALSE and (Is Expired = TRUE or Status = In Progress).
      - learn more about the functionality here.
    - Edit button:
      - To edit fields, the site user must have Edit access to the fields.
      - Editable fields include:

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- The Payment Form and Renewal Form fields (from field sets on Subscription/Term).
- Any custom fields outside the managed package.

The Membership Details component allows you to display both default and additional fields for each membership. This functionality is customisable using field sets, enabling flexibility while ensuring key fields are always visible.

The following fields are always displayed on the Membership Details component, regardless of their inclusion in field sets: *Title, Description, Membership Fee, Next Billing Date, Subscription Start Date, Subscription End Date*.

The following fields are part of the default fieldsets named “Membership Details Default Fieldset” on Membership Subscription and Membership Subscription Term objects: *Grace Period, Instalment Payment Period, Status, Renewal Form, Payment Form, Membership Length, Plan.*

The component has the following properties:

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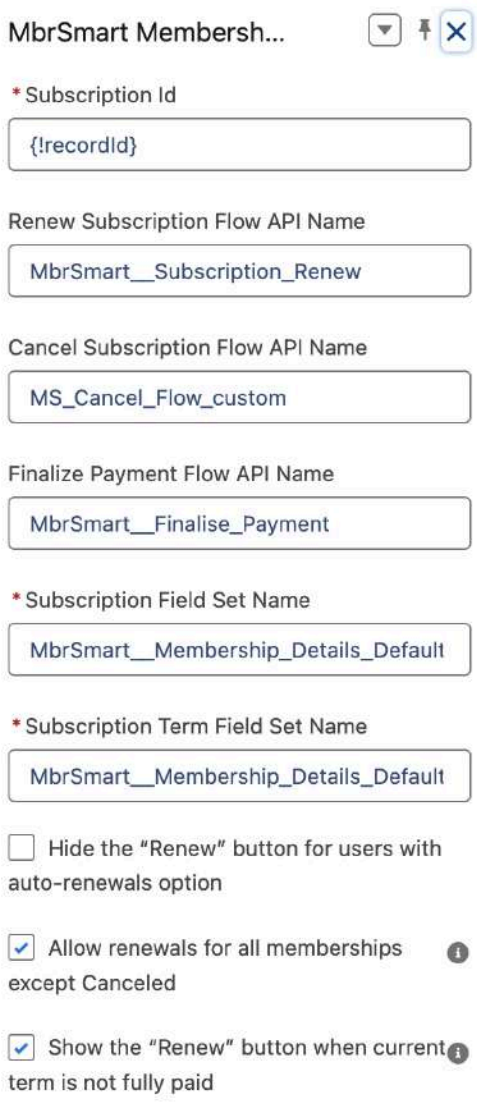

Subscription Id – text field
Leave the default value

Renew Subscription Flow API Name – add the renew flow API name

Cancel Subscription Flow API Name – add the cancellation flow api name (not provided by AC, please create the cancellation flow according to your organisation needs)

Finalize Payment Flow API Name – add the flow API name

Subscription Field Set Name – add the subscription fieldset API name to define which object fields to display

Subscription Term Field Set Name – add the subterm fieldset API name to define which object fields to display

Hide the "Renew" button for users with auto-renewals option – Enable the option to hide the 'Renew' button when the Auto-renewals option is selected for a specific product by the admin in the backend at the product level

Allow renewals for all memberships except Canceled – If enabled, members will see the Renew button if their subscription is in any status except Canceled and will be able to renew the membership

Show the "Renew" button when current term is not fully paid – Enable to show the 'Renew' button even if there are unpaid instalments on the current term

Renew, Cancel and Finalize Payment buttons are not displayed if the flow fields are blank.

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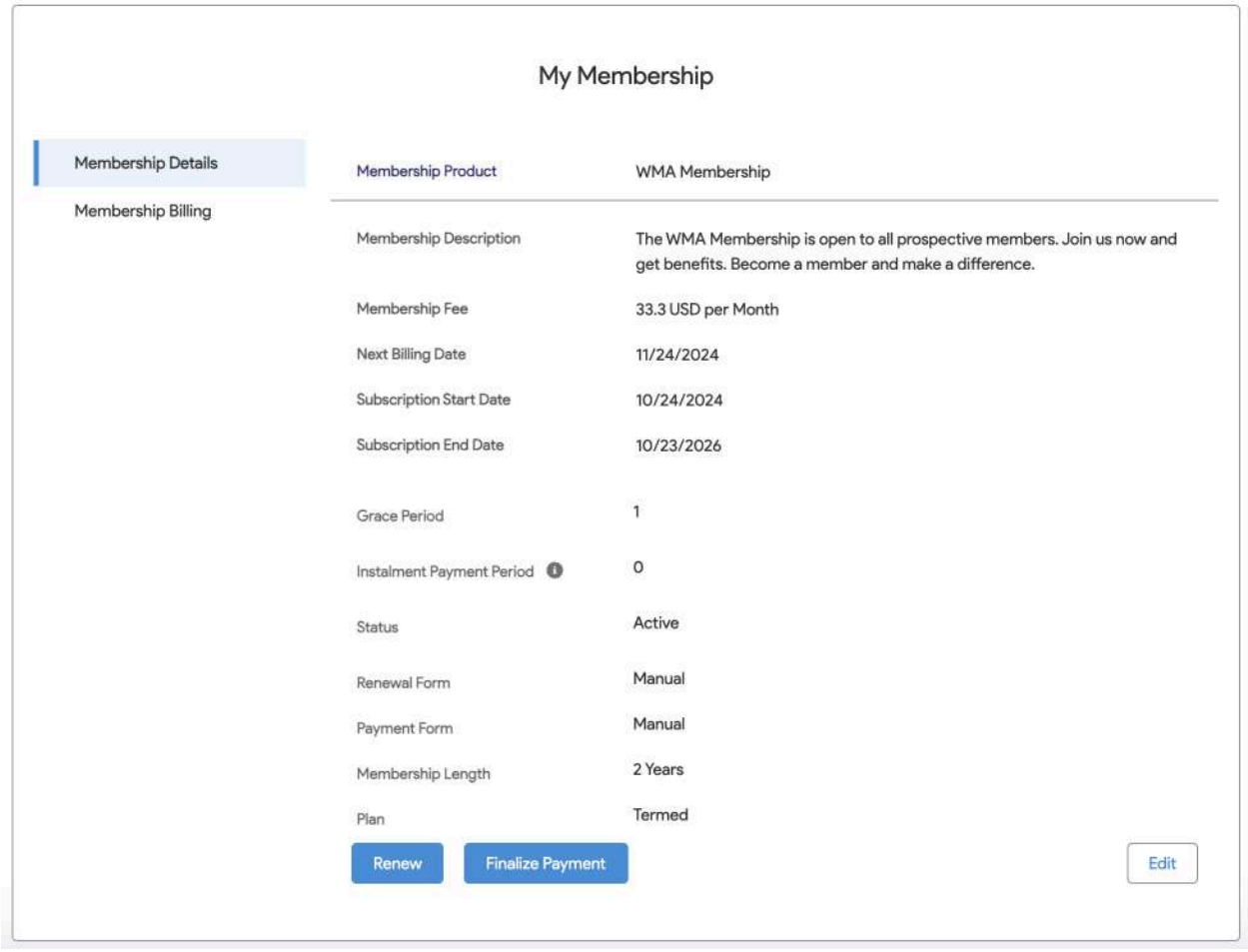
As an admin, you have the flexibility to choose whether to display the component within the Membership Manager or use it separately. **Please note** that the Membership Manager component will not receive further updates or development in future releases. For displaying membership details, we recommend utilizing the Membership Details component.

Finalise Payment Flow

We provide a default flow for members to complete the payment process by clicking the “Finalise Payment” button on the Membership Details (Membership Manager) component.



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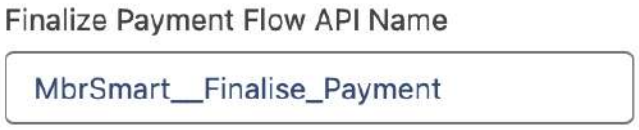
To allow members to finalise interrupted subscription payments, go to the Membership Details (Membership Manager) component and add the API name of the flow to the component property. The API name should contain the “MbrSmart__” namespace.



You can customize the flow according to your needs.

Note We suggest cloning the default flow before making any changes to it.

The flow can be used for different payment scenarios:

- Invoice Payment: Community users opting for payment by invoice can finalise payment directly within the portal.
- Card Payment: Community users choosing card payment can use this flow to pay upcoming instalments as needed.

The "Finalise Payment" button appears under the following conditions:

- Unified Checkout Integration Enabled:
    - The subscription status is either Active or Pending + Is_Ready_For_Single_Pay__c = true and Due_Date__c > Today.
    - Unpaid instalments exist for the current subterm.
    - The fields Checkout Order Item Number, Checkout Installment Setup Id, and Is Connected To Checkout on the Sub Term object are populated (indicating that an order item has been generated by Unified Checkout for this subscription).
- Native Payment:
    - The subscription status is either Active or Pending + Is_Ready_For_Single_Pay__c = true и Due_Date__c > Today.
    - Unpaid instalments exist for the current subterm.

Configuration considerations for Finalise Payment flow:

- If using Native Payment:
  Ensure a default payment method is set. The Finalise Payment flow will not proceed without it.

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- If using Checkout Integration:
  Card Payment: The flow completes as expected.
  Invoice Payment: Recurring processes and Finalise Payment functionality are not fully supported on the Checkout side.

Additional behaviour notes:

- Instalments with statuses Close Collected or In Progress are excluded from the Finalise Payment process.
- Upon initiating payment, each instalment enters In Progress status:
    - With Unified Checkout Integration: Payment processing occurs after the related scheduled job completes in Checkout.
    - With Native Payment: Payment processes immediately.

After clicking the Finalise Payment button, the following screens guide users through the payment process:

Screen 1: Instalment Selection

Users choose to pay either the next instalment (default option) or the entire current membership period, depending on instalments remaining.

The “Pay for the whole period“ option is hidden if there is only one instalment left for payment.

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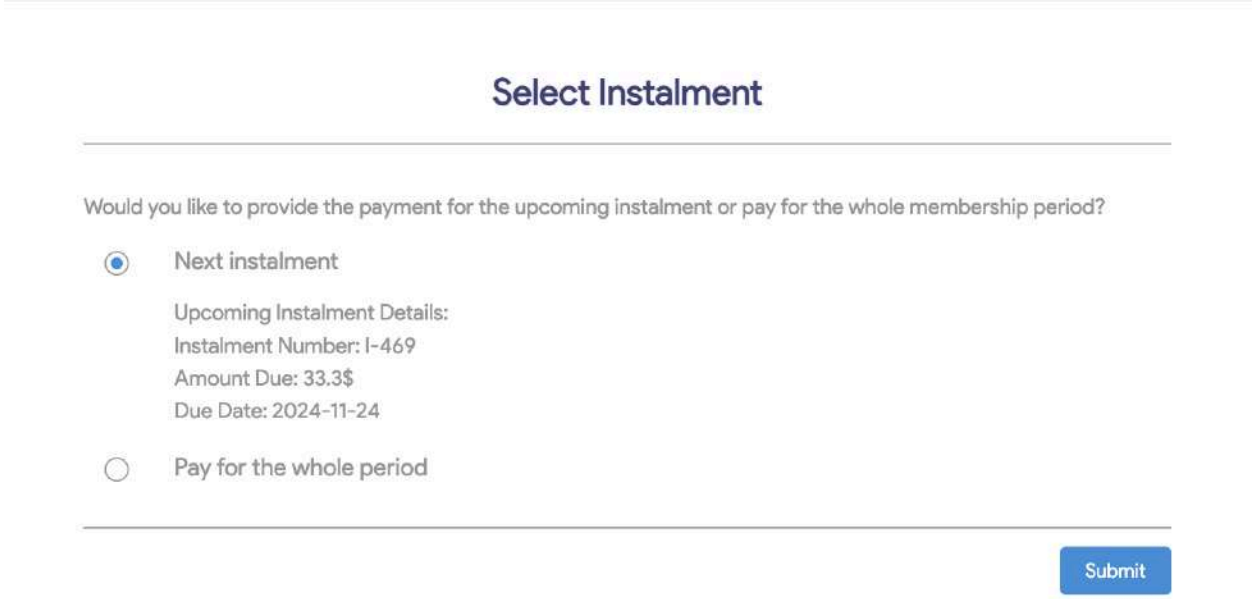

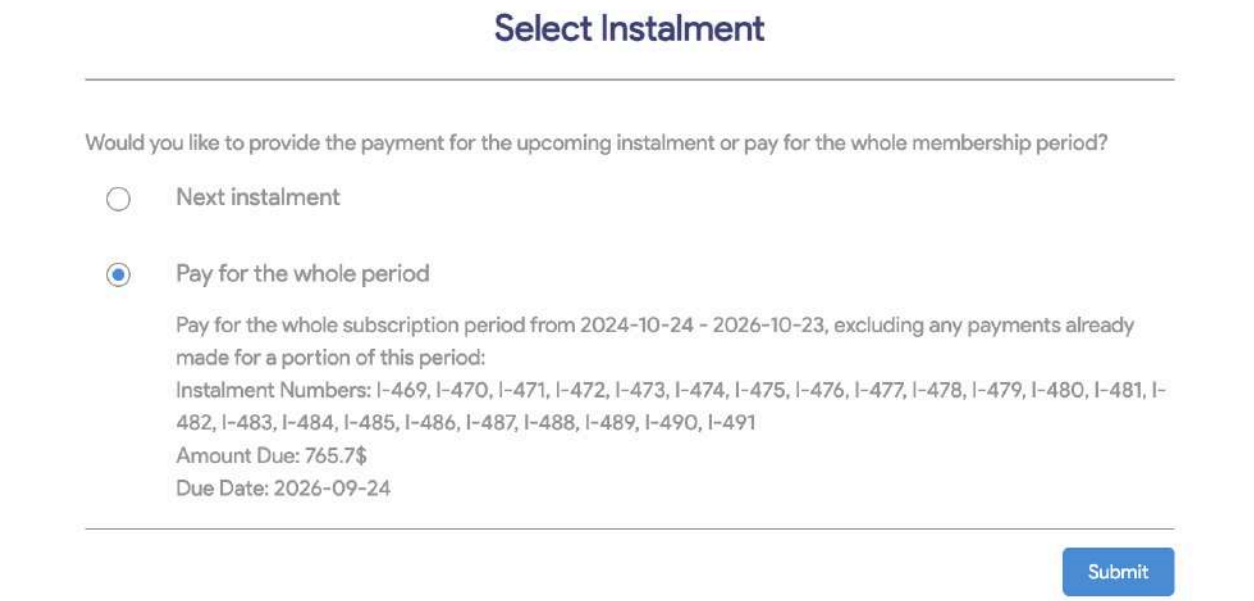

After selection, clicking Submit proceeds to the confirmation screen.

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Screen 2: Confirmation

A success message confirms that the payment is being processed, with a reminder that a receipt will be sent upon completion.

The users receive a receipt for each instalment once the payment is complete.

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Get In Touch

AC MemberSmart is created and maintained by AdvancedCommunities.com – the Experience Cloud experts.

We specialize in Experience Cloud customization, development, and consulting.

Feel free to contact us regarding anything related to Experience Cloud.

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