



AC MemberSmart User Guide

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Overview

The AC MemberSmart app provides a comprehensive system for membership management. Native to Salesforce, customizable and flexible, the app lets membership organizations and associations easily work and manage members, track their activities, provide more value, and enable growth and scaling.

The key features:

- Creating and managing membership experience.
- Storing information about members with a 360-degree member view on Salesforce.
- Managing membership payments and donations.
- Organizations directory.
- Event management.
- Processing orders from the member portal.
- Providing job management.
- Visualizing key business metrics through personalized dashboards.
- Continuous Professional Development functionality.
- Engagement scoring.

AC MemberSmart is an all-inclusive, customizable, and flexible app that lets efficiently work for a wide range of membership organizations and associations.

The product is 100% Salesforce native, includes all needed features for membership management, and provides a 360-degree view of members. In addition, AC Membersmart helps to digitalize organizations by simplifying the data processing, automating the manual operation, and many more.

AC MemberSmart includes a list of features: Payments and Donations, Events, Training, Meetings, Organization Directory, Member Directory, eCommerce, Groups, Job Board, Blog, and Subscription Management.

With AC MemberSmart, organizations can **collect payments** via the portal. We provide Stripe integration and a Custom Screen Flow option that enables connection to any payment service. All data about payments are collected automatically at Salesforce and you can find information by each user inside the Member Card - LTV, orders, events attended, and so on. Member Card demonstrates all information about users and incarnates the Salesforce Member 360 opportunities. As well as payments, you can collect donations from the portal. Members can choose the amount of fee they'd prefer to donate. The billing form is auto-populated with the information from your contact.

The **Event management** feature supports all types of events, meetings, and training - online/offline/hybrid with any pricing option - free, paid, free, or paid with a donation. Customizable filters help find relevant events for members, and the calendar component allows tracking them. Members can find all the information on the event landing page in the tabs. Some tabs are generated automatically and others you can create based on your needs.

Member Directory - a tool to find and collaborate with other members. Flexible filters enable users to identify members by their first/last name, email, location, skills, industry, and any other attributes. Like a Member Directory, **Organization Directory** has customizable filters that enable search organizations by location, industry, or other custom values. In addition, the organization detail page is placed contact information, description, customer reviews, and an option to contact an organization.

eCommerce. Our Shop enables you to set up an online store at the member portal to sell real and virtual items. For members' usability, the items can be sorted by categories, price, and alphabetically.

We provide the tool for **CPD** - continuous professional development. CPD ensures that members maintain and enhance the knowledge and skills they need. The scoring and task system is clear and transparent. On the CPD page, members can log their activity, track the time and add attachments.

For content sharing, we offer the **Blog** and **Chatter Feed**. For convenience, the Chatter Feed might be put on a separate page.

In the Blog, for quick and easy search, we provide categories and tags. Inside the blog post, members can leave a comment to discuss it.

Member organizations often have members in particular industries, and **Job Boards** with industry-specific positions can provide additional value for members. The employer can add a new vacancy by filling out a form in a few minutes. The job seekers can filter existing jobs by industry, experience, type, or other custom values.

The job detail page provided all information about the hiring company - industry, salary, and requirements for the employee. The candidate can apply for the position and attach CVs on the same page.

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.

In our app, all the processes and forms such as member registration or membership renewal are based on standard Salesforce Lightning Flow functionality – a very flexible and powerful framework that can be used to create all sorts of Forms from basic to supercomplex multi page forms with branching logic and dynamic elements.

Configuration

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**

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

- **MemberSmart Guest**

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

Action	Permission Set Label	Description	License
☐ Clone	MemberSmart Admin	Utilized for full Admin permissions access	
☐ Clone	MemberSmart Guest	Utilized for Guest User permissions access	
☐ Clone	MemberSmart User	Utilized for Community User permissions access	
☐ Clone	Merchandiser	Allow access to commerce merchandising features	Commerce Merchandiser User Permission Set License S
☐ Clone	OmniStudio Admin	Allows admin users to configure OmniScripts, DataRaptors, ...	OmniStudio Admin
☐ Clone	OmniStudio User	Allows users to execute OmniScripts, DataRaptors, Integrati...	OmniStudio User
☐ Clone	Rebate Management Admin	Gives users access to create Rebate Programs, apply adjus...	Rebate Management
☐ Clone	Rebate Management User	Gives users access to view and create Rebates for their me...	Rebate Management
☐ Clone	Rule Engine Designer	Provides read and edit access to the calculate run time obje...	Business Rules Engine Designer

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

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	MemberSmart Guest
Contacts	-	-	-
Stripe Customer Id	Read/Edit	-	-
Mobile Phone	Read/Edit	Read	-
CPD Activities	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read	-
CPD Objective	Read/Edit	Read/Edit	Read/Edit
CPD Points	Read/Edit	Read/Edit	Read/Edit
Description	Read/Edit	Read	-
Title	Read/Edit	Read/Edit	Read/Edit
Type	Read/Edit	Read/Edit	Read/Edit
CPD Objectives	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read	-
Description	Read/Edit	Read	-
End Date	Read/Edit	Read/Edit	Read/Edit
Is Active	Read/Edit	Read	-

Name	Read/Edit	Read/Edit	Read/Edit
Required Points	Read/Edit	Read	-
Start Date	Read/Edit	Read/Edit	Read/Edit
Is Expired	Read	Read	-
CPD User Activities	-	-	-
Activity Taken Date	Read/Edit	Read/Edit	Read/Edit
Contact	Read/Edit	Read/Edit	Read/Edit
CPD Activity	Read/Edit	Read/Edit	Read/Edit
The activity is completed	-	-	-
Time Spent	Read/Edit	Read/Edit	Read/Edit
Title	Read/Edit	Read/Edit	Read/Edit
Instalment	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read	-
Amount	Read/Edit	Read/Edit	Read/Edit
Close Date	Read/Edit	Read	-
Contact	Read/Edit	Read/Edit	Read/Edit
CurrencyISO	Read/Edit	Read/Edit	Read/Edit
Due Date	Read/Edit	Read/Edit	Read/Edit
Expiration Date	Read	Read	-
Interval	Read	Read	-
Is Closed	Read	Read	-
Is Expired	Read	Read	-
Is Ready For Pay	Read	Read	-
Name	Read	Read	Read

Opportunity	Read/Edit	Read	-
Owner	Read/Edit	Read	-
Status	Read/Edit	Read/Edit	Read/Edit
Subscription Term	Read/Edit	Read	-
Title	Read/Edit	Read	-
Membership Payment Methods	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read/Create/Edit/Delete	-
Account	Read/Edit	Read/Edit	-
Account Holder Type	Read/Edit	Read/Edit	-
Bank Name	Read/Edit	Read/Edit	-
Brand	Read/Edit	Read/Edit	-
Contact	Read/Edit	Read/Edit	-
Currency ISO	Read/Edit	Read/Edit	-
Expiration Date	Read	Read	-
Expiration Month	Read/Edit	Read/Edit	-
Expiration Year	Read/Edit	Read/Edit	-
Holder's Name	Read/Edit	Read/Edit	-
Is Default	Read/Edit	Read/Edit	-
Is Unverified	Read/Edit	Read/Edit	-
Is Visible For Guest	Read/Edit	Read	-
Last 4	Read/Edit	Read/Edit	-
Last Modified By	Read	Read	Read
Name	Read	Read	Read
Record Type	Read/Edit	Read/Edit	Read/Edit

Stripe Payment Method Id	Read/Edit	Read/Edit	Read/Edit
Membership Payment Transactions	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	-	-
Account	Read/Edit	-	-
Contact	Read/Edit	-	-
Currency ISO	Read/Edit	-	-
Failing Reason	Read/Edit	-	-
Is Closed	Read	-	-
Is Visible For Guest	Read/Edit	-	-
Membership Subscription Term	Read/Edit	-	-
Name	Read	Read	Read
Payment Method	Read/Edit	-	-
Stripe Payment Intent Id	Read/Edit	-	-
Total Amount	Read/Edit	Read/Edit	Read/Edit
Transaction Status	Read/Edit	Read/Edit	Read/Edit
Membership Subscriptions	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read/Create	-
Account	Read/Edit	Read/Edit	-
Contact	Read/Edit	Read/Edit	Read/Edit
End Date	Read/Edit	Read	-
Grace Period	Read/Edit	Read	-
Is Cancelled	Read/Edit	Read	-
Is Individual	Read/Edit	Read	-

Is Visible For Guest	Read/Edit	Read	-
Name	Read/Edit	Read/Edit	Read/Edit
Paid Through Date	Read/Edit	Read	-
Product	Read/Edit	Read/Edit	-
Start Date	Read/Edit	Read	-
Status	Read	Read	-
Term Count	Read/Edit	Read	-
Title	Read/Edit	Read/Edit	-
Renewal Form	Read/Edit	Read/Edit	Read/Edit
Membership Subscription Terms	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	Read/Create	-
End Date	Read/Edit	Read	-
Membership Length	Read/Edit	Read/Edit	Read/Edit
Membership Subscription	Read/Edit	Read/Edit	Read/Edit
Name	Read	Read	Read
Payment Form	Read/Edit	Read/Edit	Read/Edit
Payment Frequency	Read/Edit	Read/Edit	Read/Edit
Plan	Read/Edit	Read/Edit	Read/Edit
Start Date	Read/Edit	Read	-
Title	Read/Edit	Read/Edit	-
Products	-	-	-
Default Grace Period	Read/Edit	Read	Read
Is Subscription Product	Read	Read	Read

Membership Lengths	Read/Edit	Read	Read
Payment Frequencies	Read/Edit	Read	Read
Product Description	-	-	-
Product Name	Read/Edit	Read/Edit	Read/Edit
Product Record Type	Read/Edit	Read/Edit	Read/Edit
Subscription Plans	Read/Edit	Read	Read
Renewal Forms	Read/Edit	Read	Read
Opportunity	-	-	-
Is Expired	Read	-	-
End Date	Read/Edit	-	-
Expiry Paid Date	Read	-	-
Membership Subscription Term	Read/Edit	-	-
Start Date	Read/Edit	-	-
Subscription Currency ISO	Read/Edit	-	-
Pricebook Relation	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	-	-
Price Book	Read/Edit	-	-
Subscription Length	Read/Edit	-	-
Title	Read/Edit	-	-
Log	Read/Create/Edit/Delete/ViewAllRecords/ModifyAllRecords	-	-
Apex Line	Read/Edit	-	-
Body	Read/Edit	-	-

Log Name	Read	Read	Read
Triggered	Read/Edit	Read/Edit	Read/Edit
Time	Read/Edit	Read/Edit	Read/Edit

Standard Objects and Fields

Give users access to the standard objects. The table contains access that was not provided in the permission sets due to Salesforce restrictions.

Objects and Fields	MemberSmart Admin	MemberSmart User	MemberSmart Guest
Account	Read/Create/Edit/Delete	Read	Read
Billing Address	Read/Edit	Read	-
Description	Read/Edit	Read	-
Phone	Read/Edit	Read	-
Contacts	Read/Create/Edit/Delete	Read/Edit	Read
Account Name	Read/Edit	Read	-
Email	Read/Edit	Read	-
Phone	Read/Edit	Read	-
CPD User Activities	Read/Edit	Read/Create	-
The activity is completed	Read	Read	-
Opportunity	Read/Create/Edit/Delete	-	-
Amount	Read/Edit	-	-
Products	Read/Create/Edit/Delete	Read	Read
Product Description	Read/Edit	Read	Read

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

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
 - System Permissions – View Reports in Public Folders
- Add a permission to view the Price Books tab in Object Settings – Price Books – Tab Settings = Default On

Apex Class Access

The list contains access provided in the permission sets.

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

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.

- Provide access for **admin users** to the following Apex Classes:

MbrSmart.AchFormController

MbrSmart.ContactInfoController

MbrSmart.CpdContainerController

MbrSmart.DashboardManager

MbrSmart.EngagementScoreSettingsController

MbrSmart.FilesUploaderController

MbrSmart.GeneralSettingsController

MbrSmart.LogNewUserActivityFormController

MbrSmart.MemberCardController

MbrSmart.MemberRegistrationController

MbrSmart.MembershipManagerController

MbrSmart.MembershipSubscriptionsController

MbrSmart.PaymentProviderContainerController

MbrSmart.PaymentFormController

MbrSmart.PaymentFrequencyController

MbrSmart.PaymentMethodsController

MbrSmart.PaymentMethodsManagerController

MbrSmart.PaymentMethodsProviderController

MbrSmart.PaymentTermsController

MbrSmart.PaymentServiceSettingsController

MbrSmart.PlaidSettingsController

MbrSmart.ProductEntry

MbrSmart.SettingsController

MbrSmart.StripePaymentElementController

MbrSmart.StripeSettingsController

- Provide access for **external users** to the following Apex Classes:

MbrSmart.AchFormController

MbrSmart.ContactInfoController

MbrSmart.CpdContainerController

MbrSmart.DashboardManager

MbrSmart.EngagementScoreSettingsController

MbrSmart.FilesUploaderController

MbrSmart.GeneralSettingsController

MbrSmart.LogNewUserActivityFormController

MbrSmart.MemberCardController

MbrSmart.MemberRegistrationController

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

- Provide access for **guest users** to the following Apex Classes:

MbrSmart.AchFormController

MbrSmart.MemberRegistrationController

MbrSmart.PaymentProviderContainerController

MbrSmart.PaymentFormController

MbrSmart.PaymentFrequencyController

MbrSmart.PaymentMethodsController

MbrSmart.PaymentTermsController

MbrSmart.ProductEntry

MbrSmart.StripePaymentElementController

Flow Access

The list contains access provided in the permission sets.

To set Flow access manually, go to Setup - Profiles and select a profile.

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.

[Profile Overview](#) > Flow Access

Flow Access

Available Flows	Enabled Flows
MbrSmart.Member Registration	--None--

- Provide access for **admin users** to the following Flows:

MbrSmart.Member Registration

MbrSmart.Subscription Renew

- Provide access for **external users** to the following Flows:

MbrSmart.Member Registration

MbrSmart.Subscription Renew

- Provide access for **guest users** to the following Flows:

MbrSmart.Member Registration

Visualforce Page Access

The list contains access provided in the permission sets.

To set Visualforce Page access manually, go to Setup - Profiles and select a profile.

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.

- Provide access for **admin users** to the following Visualforce Pages:

MbrSmart.PlaidLink

MbrSmart.StripePaymentElement

- Provide access for **external users** to the following Visualforce Pages:

MbrSmart.PlaidLink

MbrSmart.StripePaymentElement

- Provide access for **guest users** to the following Visualforce Pages:

MbrSmart.PlaidLink

MbrSmart.StripePaymentElement

Custom Metadata Types

The list contains access provided in the permission sets.

Provide access 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

Provide access for **external users** to the following Custom Metadata Types:

MbrSmart.Engagement Score Setting

MbrSmart.MemberSmart General Setting

MbrSmart.Payment Service Setting

Provide access for **guest users** to the following Custom Metadata Types:

MbrSmart.MemberSmart General Setting

MbrSmart.Payment Service Setting

Sharing Settings

Org-Wide Default (Default External Access):

- Account/Contact
 - Private (no access to other members' contact details)
- Instalment
 - Private
- Opportunity
 - Private
- Product
 - Read Only (membership products visible to all community users)
- CPD Objective

- Read Only (CPD objectives visible to all community users)
- CPD Activity
 - Read Only (CPD activities visible to all community users)
- Membership Payment Method
 - Private (members will have access to the payment methods they own, configure [sharing sets](#))
- Membership Payment Transaction
 - Private
- Membership Subscription
 - Private (members will see only their own subscriptions, configure [sharing sets](#))
- Membership Subscription Term
 - Private (members will see only their own subscription terms, configure [sharing sets](#))

Sharing Sets

Grant site users access to records associated with an account or contact that matches the user's account or contact.

Sharing Sets for the following objects are included in a package:

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

Important! Add site users' profiles to the "Membership Sharing Sets" sharing set.

By default, profiles are not added to the sharing set. Please do it manually.

Go to Digital Experiences - Settings - Sharing Sets. Open the record, click "Edit" and add required profiles.

Note Make changes to sharing sets if using organisational membership scenario.

By default, access is determined by Contact object for individual membership subscriptions.

If you are using organisational membership scenario (not individual membership scenario) in your org, please make changes to the provided sharing sets for the following objects to share **Account** access instead of **Contact**, as organisational membership subscriptions are assigned to Accounts:

- Membership Subscription
- Membership Subscription Term

Access Granted			
Action	Object	Access Determined By	Access Level
Edit Del	Instalment	User:Contact = Instalment.MbrSmart__Contact__c	Read Only
Edit Del	Membership Payment Method	User:Contact = Membership Payment Method.MbrSmart__Contact__c	Read/Write
Edit Del	Membership Subscription	User:Account = Membership Subscription.MbrSmart__Account__c	Read Only
Edit Del	Membership Subscription Term	User:Account = Membership Subscription Term.MbrSmart__Subscription__c.MbrSmart__Account__c	Read Only

Guest User Permissions

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

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

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.

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 membership subscriptions internally.

Page Layout Assignments

Please assign the appropriate page layouts for your admin user.

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.

The screenshot shows the 'Membership Subscription Detail' page layout. At the top, there are 'Standard Buttons' (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy) and 'Custom Buttons'. Below this is the 'Information' section (Header visible on edit only) with fields: Title (Sample Text), Account (Sample Text), Contact (Sample Text), Product (Sample Text), Grace Period (97 549), Status (Sample Text), and Renewal Form (Sample Text). To the right, there are fields for Paid Through Date (17.06.2023), Start Date (17.06.2023), End Date (17.06.2023), Term Count (20 672), Is Individual (checked), Is Cancelled (checked), and Owner (Sample Text). At the bottom, there is a 'System Information' section (Header visible on edit only) with 'Created By' (Sample Text) and 'Last Modified By' (Sample Text).

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 to the needed profiles (System Admin) through Setup - Object Manager - Product - Page Layout - Page Layout Assignment.

Product Detail

Standard Buttons: [Change Record Type](#) [Printable View](#) [Edit](#) [Delete](#) [Clone](#) [Preview](#) [Sharing](#) [Copy Bundle](#) Custom Buttons

Fields (Header not visible)

★ Product Name	Sample Text	Is Subscription Product	✓
Product Description	Sample Text	Is Visible For Guest	✓
★ Default Grace Period	29 000		

Subscription Info

★ Membership Lengths	Sample Text	★ Subscription Plans	Sample Text
★ Payment Frequencies	Sample Text	★ Renewal Forms	Sample Text

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.

Information (Header visible on edit only)

🔑 Name	GEN-2004-001234	Start Date	17.11.2023
Title	Sample Text	End Date	17.11.2023
★ Membership Subscription	Sample Text	Owner	Sample Text
★ Membership Length	Sample Text		
★ Payment Form	Sample Text		
★ Payment Frequency	Sample Text		
★ Plan	Sample Text		

System Information (Header visible on edit only)

🔑 Created By	Sample Text	🔑 Last Modified By	Sample Text
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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.

CPD Objective Detail

Standard Buttons: [Edit](#) [Delete](#) [Clone](#) [Change Owner](#) [Change Record Type](#) [Printable View](#) [Sharing](#) [Sharing Hierarchy](#) Custom Buttons

Information (Header visible on edit only)

★ Name	Sample Text	Required Points	27 500
★ Start Date	17.05.2023	Is Active	✓
★ End Date	17.05.2023	Owner	Sample Text
Description	Sample Text		

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.

CPD Activity Detail

Standard Buttons: [Edit](#) [Delete](#) [Clone](#) [Change Owner](#) [Change Record Type](#) [Printable View](#) [Sharing](#) [Sharing Hierarchy](#) Custom Buttons

Information (Header visible on edit only)

★ Title	Sample Text	★ CPD Points	43 803
★ CPD Objective	Sample Text	★ Type	Sample Text
Description	Sample Text	Owner	Sample Text

System Information (Header visible on edit only)

🔑 Created By	Sample Text	🔑 Last Modified By	Sample Text
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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.

Information (Header visible on edit only)		The activity is completed ✓	
Name	GEN-2004-001234	Activity Taken Date	17.11.2023
Title	Sample Text	Time Spent	Sample Text
Contact	Sample Text		
CPD Activity	Sample Text		
System Information (Header visible on edit only)			
Created By	Sample Text	Last Modified By	Sample Text

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.

Membership Payment Transaction Detail		Standard Buttons		Custom Buttons	
		Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy			
Information (Header visible on edit only)		Account		Sample Text	
Name	GEN-2004-001234	Contact		Sample Text	
Membership Subscription Term	Sample Text	Total Amount		\$123.45	
Payment Method	Sample Text	Currency/ISO		Sample Text	
Stripe Payment Intent Id	*****7890	Is Closed		✓	
Transaction Status	Sample Text	Owner		Sample Text	
Failing Reason	Sample Text				
System Information (Header visible on edit only)					
Created By	Sample Text	Last Modified By		Sample Text	

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.

Object: Pricebook Relation

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

PricebookRelation Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing Hierarchy

Custom Buttons

Information (Header visible on edit only)

TitleSample TextOwnerSample Text

NameGEN-2004-001234
Price BookSample Text
Subscription LengthSample Text

System Information (Header visible on edit only)

Created BySample TextLast Modified BySample Text

Custom Links (Header visible on edit only)

Object: Instalment

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

Information (Header visible on edit only)

NameGEN-2004-001234
TitleSample Text
ContactSample Text
Amount\$123.45
CurrencyISOSample Text
StatusSample Text
Subscription TermSample Text
OpportunitySample Text

Due Date31.08.2023
Close Date31.08.2023
Expiration Date31.08.2023
IntervalSample Text
Is Closed✓
Is Ready For Pay✓
Is Expired✓
OwnerSample Text

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*.

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

Opportunity Stages Picklist Values

NewReorderReplacePrintable ViewChart 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
 Namespace Prefix
 Description

Membership
 MbrSmart

Available Values

--None--

Add

Remove

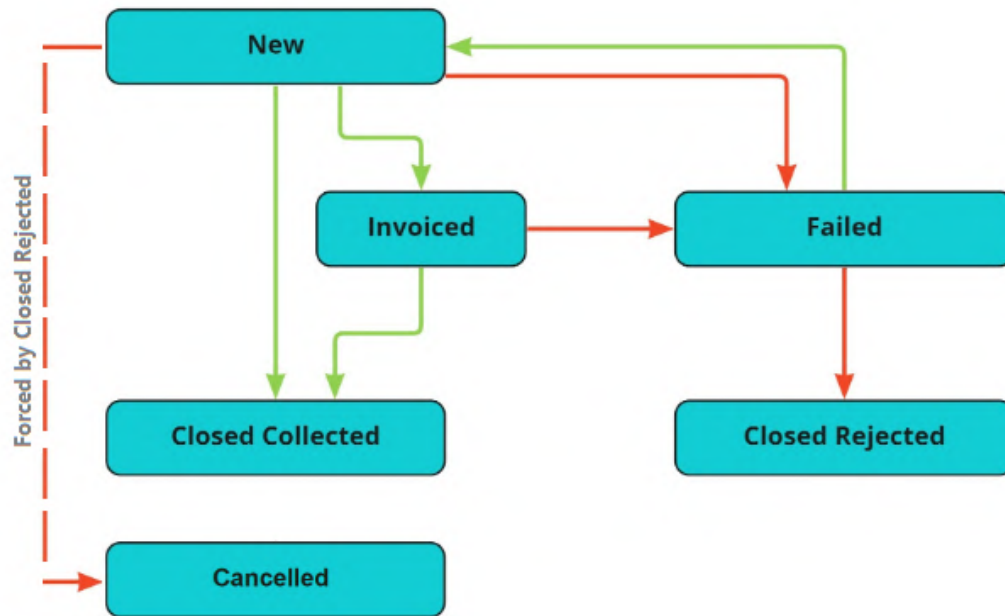
Selected Values

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:



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).

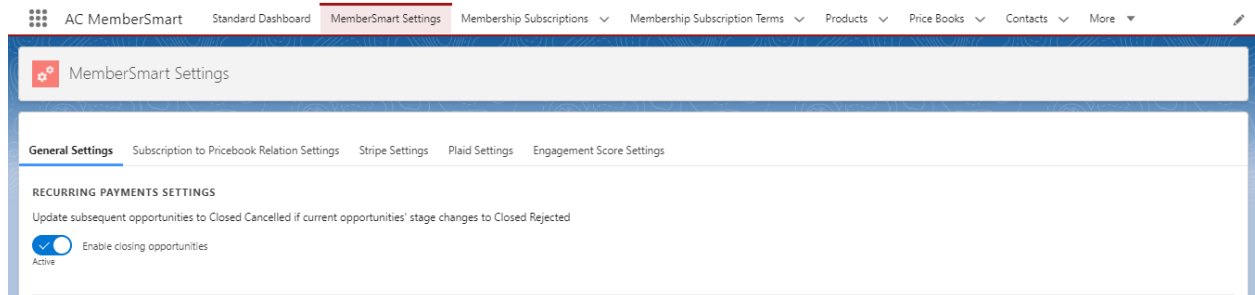
Closed Rejected – Opportunity’s close date expired.

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*.

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 component.

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.

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:

- ExpiredInstalmentScheduler

The job checks whether the payment deadline of the Failed instalment has expired (“Expiry Paid Date” field on the Instalment object) and changes the stage of the failed instalment to Closed Rejected. Runs once a day.

- MembershipRenewalEmailScheduler

The job runs a process of sending renewal email notifications every day starting from 7 days before the membership expires. Notifications are sent to the email address of the contact indicated on the subscription.

- ProcessingPaymentsHandlerScheduler

The job handles statuses’ changes for the ACH and Backs transactions.

- RecurringPaymentsScheduler

The job checks if the instalment should be paid today or before the grace period expires, if the form of payment for the subscription term associated with the opportunity equals to “Auto-Renewals”, the system tries to charge the payment.

- RenewalScheduler

The job enables automatic renewal processes for membership subscriptions with auto-renewals. Runs once a day.

- LogCleanUpBatch

The job enables automatic deletion of error logs from the past 180 days. Runs once a week.

- InvoiceInstalmentScheduler

The job automates instalment status changes and initiate invoice emails upon reaching the payment due date for invoice payments.

- ReputationPointsScheduler

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:

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

SETUP > OBJECT MANAGER
Event Participation

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

The Object Name is used when referencing the object via the API.
Object Name Example: Account

Description

Context-Sensitive Help Setting
☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type

Display Format Example: A-{0000} What Is This?

Optional Features

- ☐ Allow Reports
- ☒ Allow Activities
- ☒ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status [What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

SETUP > OBJECT MANAGER

Event Participation

Details

Info SF

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Event Participation Field History

This page allows you to select the fields you want to track on the Event Participation History related list. Whenever a user modifies any of the fields selected below, the old are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values at their old and new field values are not recorded.

Save

Cancel

Deselect all fields

Track old and new values

Amount

☐

Deprecated Stripe Charge Id

☐

Event

☐

Event Group ID

☐

Event Transaction

☐

Guest As Contact

☐

Online Event Join Url

☐

Owner

☐

Recurring Participation

☐

UTM Campaign

☐

UTM Source

☐

User Event Participation Name

☐

Compound Id

☐

Deprecated Voucher

☐

Event Attended

☒

Event Package

☐

Follow

☐

Guest As Lead

☐

Online Event Participation Id

☐

Record Type

☐

Status

☒

UTM Medium

☐

User

☐

Save

Cancel

- *Payment Transaction* object and *Status* field

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Payment Transaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Payment Transaction Field History

This page allows you to select the fields you want to track on the Payment Transaction History related list. Whenever a user modifies any of the fields selected below, the old and new field values are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.

Save

Cancel

Deselect all fields

Track old and new values

Amount

☐

Card Last Digits (last4)

☐

Failure Message

☐

Owner

☐

Payment Method

☐

Transaction ID

☐

Brand

☐

Currency

☐

Order

☐

Paid

☐

Status

☒

brPaymentTransaction Name

☐

Save

Cancel

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

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.

- Welcome Email

The users receive an email confirmation after registering as members.

The screenshot shows a web interface for editing email templates. At the top, there's a tab labeled "Email Template" and a button "Send Test and Verify Merge Fields". Below the tab, the "Subject" field contains the text "Thank you for registering as a member of [!associationName]". The "HTML Preview" tab is selected, showing a preview of the email content. The preview text is as follows:

Dear {!memberFullName},
Thank you for becoming a member of [!associationName].

We invite you to experience you benefits as a member:

- Access member only content
- Register for member only events
- Track your educational activities
- Purchasing member only items at the special store for members
- Reach out to other members

Should you need any assistance or have any questions or comments about your membership or benefits at any time, please feel free to contact us at [!phoneNumber] or email us at [!emailAddress].
We are glad to have you.

Sincerely,
[!associationName].

- Emails are sent after the member registration process is completed.
- 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
- New CPD Activity Log Email

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

Email Template
Send Test and Verify Merge Fields

Subject

CPD Activity Successfully Logged.

HTML Preview

Dear {!memberFullName},

Your CPD activity {!cpdActivityName} for the {!cpdObjectiveName} is successfully logged!

Current Points:

Required Points: {!numberOfDefinedPoints}

- 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.

Email Template

Send Test and Verify Merge Fields

Subject | Membership Expiration Reminder.

HTML Preview |

Dear {!memberFullName},
Thank you for your ongoing participation and being a member of [{!associationName}]!

We are reaching out to remind you that your membership subscription is about to expire on {!endDate}.

To renew or update your membership please navigate to your [user profile](#)

We appreciate you and your ongoing membership.

Sincerely,
[!associationName].

- 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.

Email Template

Send Test and Verify Merge Fields

Subject | Payment Failure Notification for Your Membership Subscription.

HTML Preview

Dear {!memberFullName},

We regret to inform you that there was an issue processing your recent payment for your membership subscription with [association's name]. Unfortunately, the payment attempt on {!paymentDate} was unsuccessful. To ensure uninterrupted access to your membership benefits and services, we kindly request that you take immediate action to resolve this issue.

If you believe this payment failure is due to a technical error or if you have any questions regarding your membership subscription or payment, please feel free to contact us at [phone number] or email us at [email address].

We are glad to have you.

Sincerely,
[Association's name].

- Emails are sent when the instalment status changes to failed.
- 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

Invoices and Receipts

Invoices

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:

=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
- 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) 288-8388

Switzerland Bank

Receipt Number: a0w8d000002gpUAAQ

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

TO:

0038d00000QmGLAAZ

YOUR COMMENTS OR SPECIAL INSTRUCTIONS

We confirm the receiving of payment a0w8d000002gpUAAQ you made.

Subscription	Amount
a0x8d000001hrICAAQ	187.38
TOTAL AMOUNT	187.38

All prices are in GBP

If you have any question concerning this receipts, contact Steve Drew, mob: +380674567888, email: steve@association.com

THANK YOU!

Template name: *Receipt*

Subject: *Your receipt has arrived*

Body:

=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
- 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

Internal Setup

Member Card Component

With this feature, membership managers can track the user's main activities, such as the number of attended events, shop orders, provided payments and donations, last logins, and members' engagement scores. The component displays member's current *active* subscriptions only.

The screenshot displays a contact record for Dr. Katie Johnson. At the top, there are buttons for '+ Follow', 'Create a Member', 'Edit', and 'Delete'. Below this is a 'Related List Quick Links' section with various filters and counts. The main content area is divided into two panels. The left panel, titled 'Details', shows contact information for Dr. Katie Johnson, including her name, account name, title, department, birthdate, contact currency, and various phone numbers. The right panel, titled 'Member Overview', shows a profile picture, name, experience site, last login, and a summary of activities: Events Attended (0), Shop Orders (0), Job Applications (4), Donations (0), Payments (2261.34), and Current LTV (2261.34).

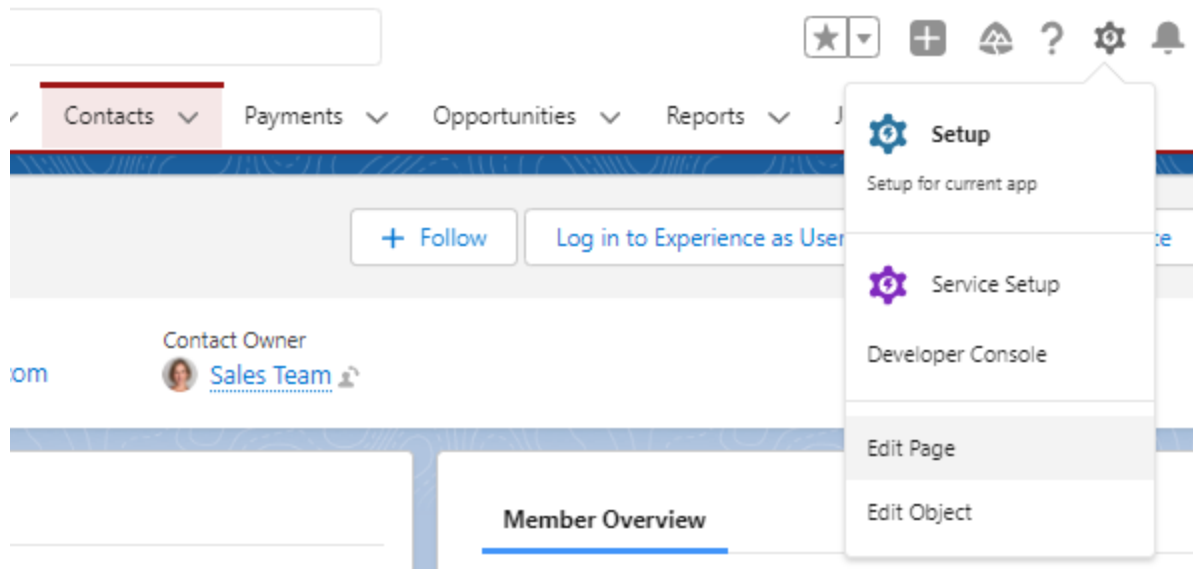
Related List Quick Links	
Membership Subscriptions (1)	Membership Payment Methods (4)
Membership Payment Transactions (9)	Opportunities (8)
Campaign History (0)	Event Participations (0)
Stripe Transactions (3)	Orders (2)
Notes & Attachments (0)	Job Applications (4)
	CPD User Activities (5)
	Cases (1)

Contact Information	
Contact Owner	Phone
Dagmara Khasueva	+1-402-555-0111
Name	Home Phone
Dr. Katie Johnson	+1-402-755-0111
Account Name	Mobile
Katie Johnson	+1 973 377 7705
Title	Other Phone
Dr. Katie Johnson	+1 973 377 7705
Department	Fax
Cardiac Services	+1 973 377 7705
Birthdate	Email
26/06/1985	katiejohnson@carser.com
Contact Currency	Asst. Phone
USD - U.S. Dollar	

Address Information	
Mailing Address	Other Address

Member Overview	
3997	Katie Johnson
	Healthcare Financial Management Association
	Experience Site: MS
	Last Login: 6/20/2023, 01:48 PM
All Time Last Year Last 6 months	
Events Attended	Shop Orders
0	0
Job Applications	
4	
Donations	Payments
0	2261.34
	Current LTV
	2261.34

On any Contact record, click Setup - Edit Page and add the component to the page.



Component property:

Community name - picklist field, default value - blank

Community Name ?

WMA
✕

Reputation points from the selected site will be updated on the component once a day. It 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](#).

The component displays or hides columns with data depending on whether packages are installed or not.

Contact Record Related List

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

The screenshot displays a Salesforce contact record for Dr. Katie Johnson. The main content area features three related lists:

- Membership Subscriptions (2)**: A table with columns Name, Start Date, and End Date. It lists two subscriptions: 'Healthcare Financial Management Association: ...' (17/10/2022 to 16/10/2026) and 'WMA Association: Katie Johnson' (17/10/2022 to 16/10/2024). A 'View All' link is at the bottom.
- Membership Payment Methods (1)**: A table with columns Name and Last 4. It lists one method: 'PM-0027' with last 4 digits '4,242'. A 'View All' link is at the bottom.
- Membership Payment Transactions (6+)**: A table with columns Name and Transaction Status. It lists one transaction: 'T-0041' with status 'Completed'. A 'View All' link is at the bottom.

The right sidebar contains filters (All time, All activities, All types) and an 'Upcoming & Overdue' section with the message: 'No activities to show. Get started by sending an email, scheduling a task, and more. No past activity. Past meetings and tasks marked as done show up here.'

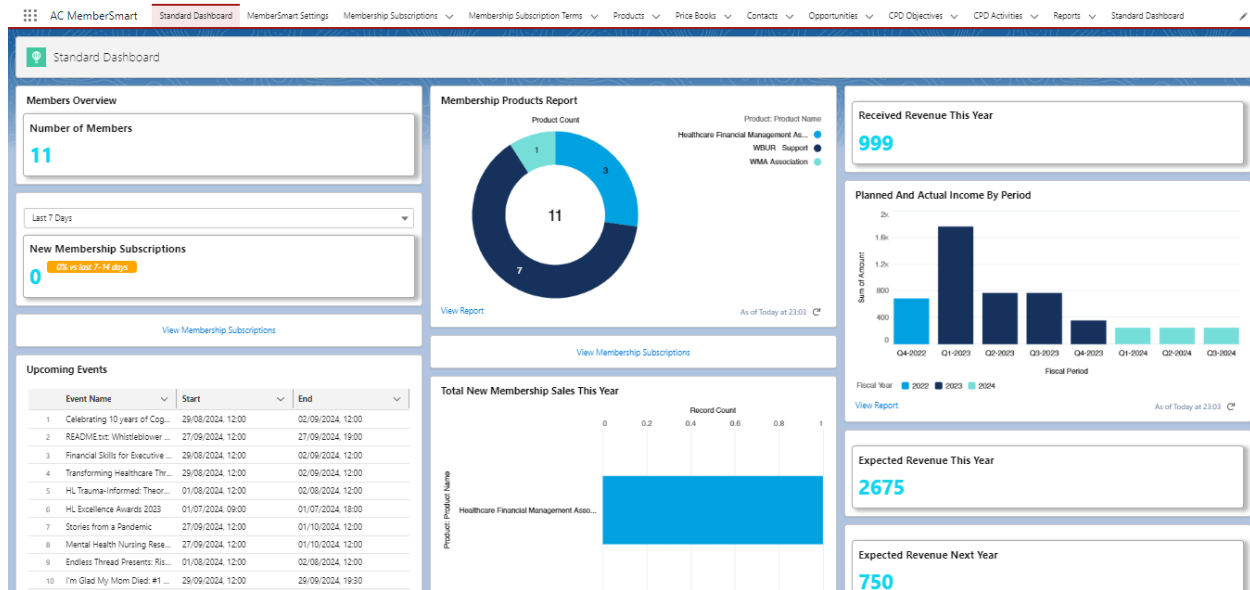
Go to Setup - Object Manager - Contact - Page Layout - Related Lists and add the following components: Membership Subscriptions, Membership Payment Transactions, Membership Payment Methods, Instalments, Event Participations, Orders, Job Applications, CPD User Activities.

Dashboards

With this feature, managers can track the main performance of the app. The dashboards become flexible and any components could be used in any place on the page.

The dashboards work inside the Salesforce environment only, it is not possible to use the components on site.

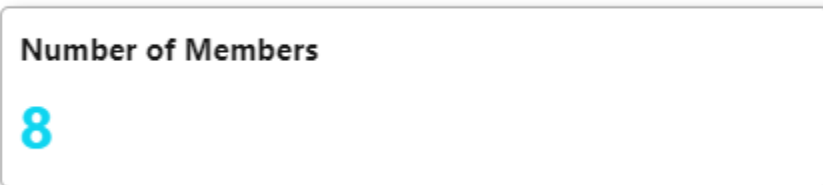
The dashboard works with reports included in the package. If needed, create your own reports to be displayed on the dashboard.



The dashboard's components:

- Number of Active Members

Members Overview

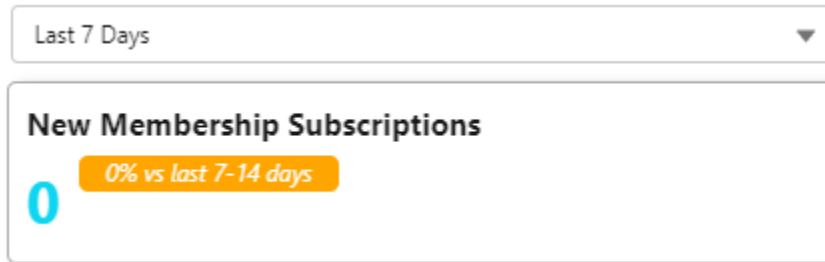


The custom component is used for displaying the actual number of active members.

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

- New Membership Subscriptions

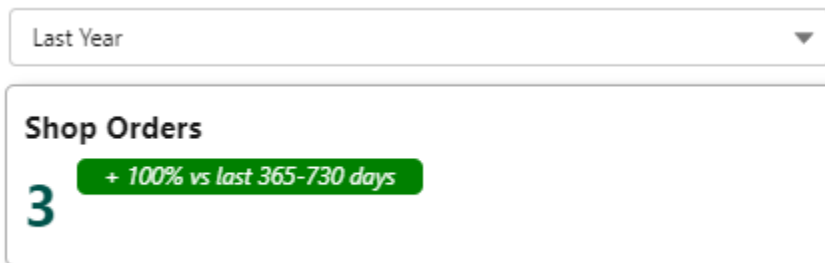


The custom component is used for displaying the number of new members for the last 7/14/30/90/year and the dynamics – the number of members decreased or increased compared to the previous period.

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.

- Number of Shop Orders



The custom component is used for displaying the number of new orders for the last 7/14/30/90/year and the dynamics – the number of shop orders 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.
- Shop Orders Line Chart

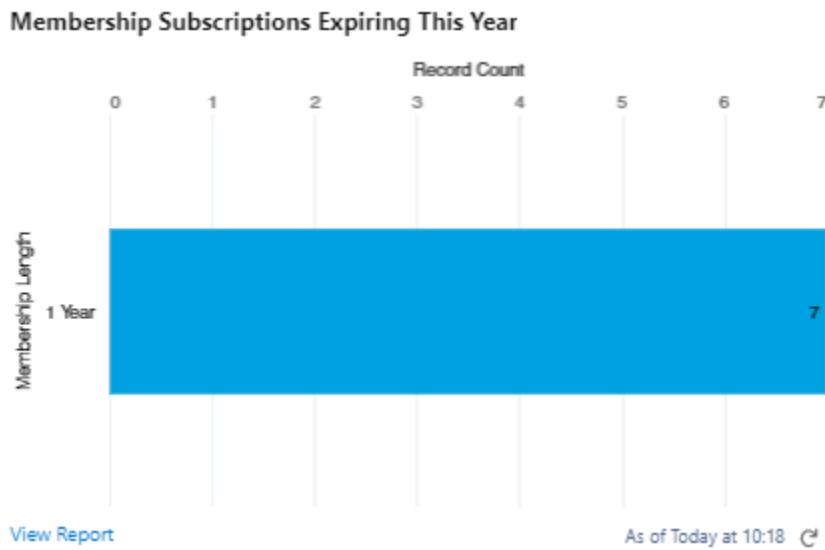


The component displays the number of activated orders on a monthly basis.

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 Subscriptions Expiring This Year

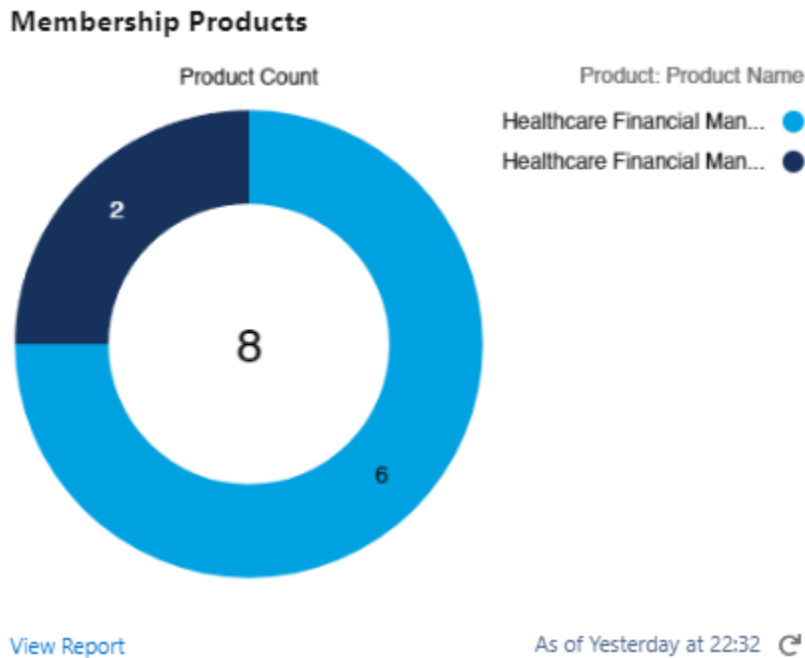


The component displays membership subscriptions expiring this year.

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

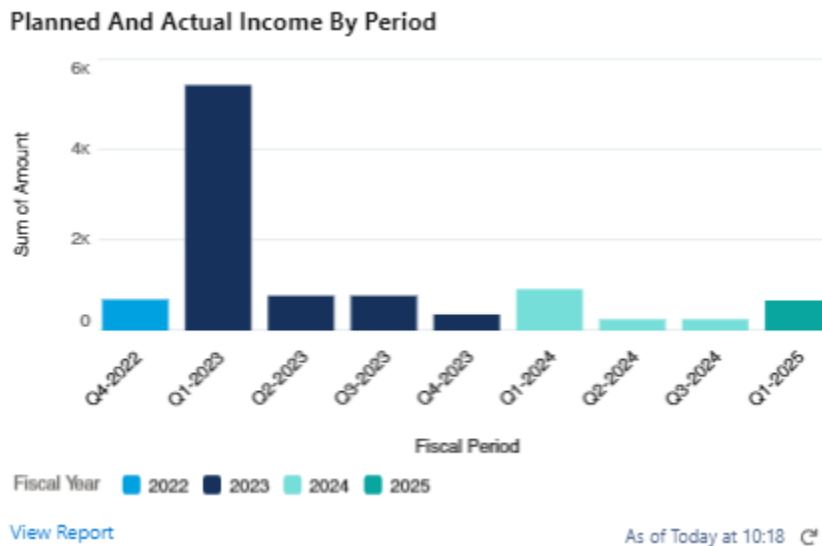


The component is used for displaying the number of existing membership subscriptions.

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*.
- *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.

- Total New Membership Sales This Year

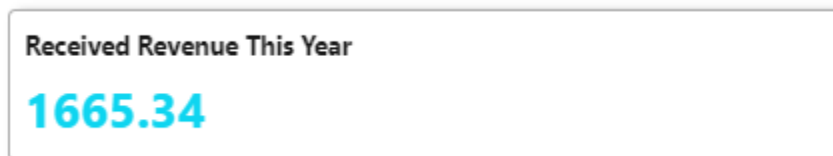


The component displays membership subscriptions purchased this year.

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.

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.

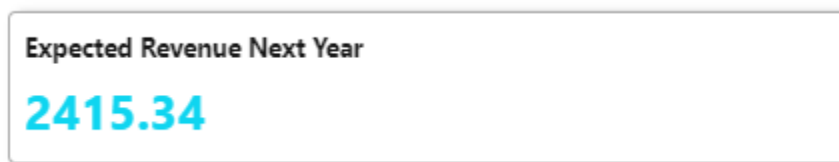
- *Point Color*. Change the color of the displayed value.
- Expected Revenue This Year



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.
 - *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.

- Expected Membership Revenue By Months

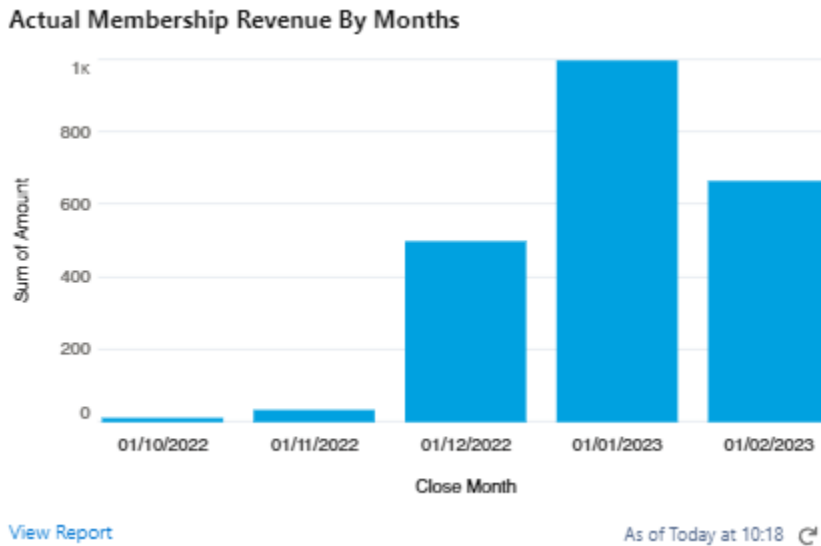


The component displays expected income by months for all time.

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

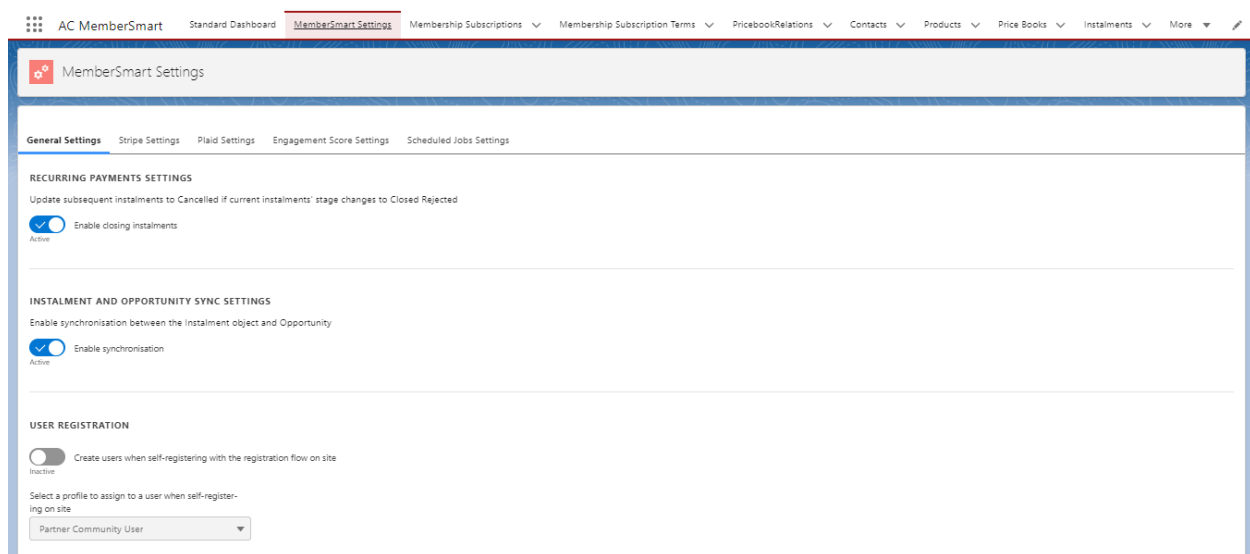
- *Text Align* – picklist field.

MemberSmart Settings

The Settings tab allows you to configure the app settings.

The tab includes the following sections of settings: General Settings, Stripe Settings, Plaid Settings, Engagement Score Settings, and Scheduled Jobs 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.

- *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](#).

- *User registration*

- 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](#).

- Select a profile from a picklist to assign to a user when self-registering on site as a member.

- *Flow settings*

- Define API name for subscription term recurring opportunities generator flow.

- *Notifications*

Define the Organization-wide Email Address from which all the notifications will be sent.

- *Guest users settings*

The settings allows displaying the file uploader to guest users during member registration on site.

Stripe Settings

Add Stripe API keys.

The screenshot shows the 'MemberSmart Settings' page with the 'Stripe Settings' tab selected. The page has a top navigation bar with 'AC MemberSmart' and 'Standard Dashboard'. Below the navigation bar, the 'Stripe Settings' tab is active, showing fields for 'Stripe Api keys', 'Stripe public key stored', and 'Stripe secret key stored'. A 'Save' button is at the bottom left.

The tab will be hidden if the “Payment Service” provider is selected under the “Payment Service Settings” tab.

Plaid Settings

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

The screenshot shows the 'MemberSmart Settings' page with the 'Plaid Settings' tab selected. The page has a top navigation bar with 'AC MemberSmart' and 'Standard Dashboard'. Below the navigation bar, the 'Plaid Settings' tab is active, showing fields for 'Client Id', 'Plaid client Id stored', 'Plaid Api key', 'Plaid secret key stored', and 'Plaid Mode' (a dropdown menu set to 'Sandbox'). A 'Save' button is at the bottom left.

The tab will be hidden if the “Payment Service” provider is selected under the “Payment Service Settings” tab.

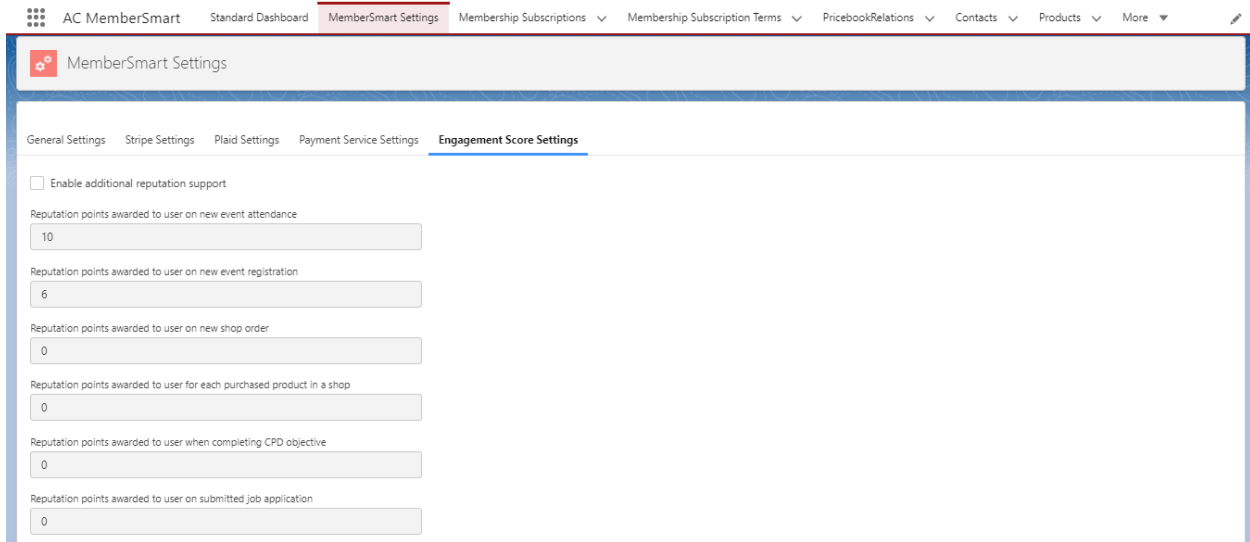
Engagement Score Settings

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.



AC MemberSmart Standard Dashboard **MemberSmart Settings** Membership Subscriptions Membership Subscription Terms PricebookRelations Contacts Products More

MemberSmart Settings

General Settings Stripe Settings Plaid Settings Payment Service Settings **Engagement Score Settings**

☐ Enable additional reputation support

Reputation points awarded to user on new event attendance
10

Reputation points awarded to user on new event registration
6

Reputation points awarded to user on new shop order
0

Reputation points awarded to user for each purchased product in a shop
0

Reputation points awarded to user when completing CPD objective
0

Reputation points awarded to user on submitted job application
0

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 on new shop order*
 - Define a number of points to be awarded to a user for the activity
- *Reputation points awarded to user for each purchased product in a shop*

- 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
- *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

Please enable the following scheduled jobs in the settings. For more detailed information about their behavior, refer to the [Scheduled Jobs](#) section.

AC MemberSmart Standard Dashboard **MemberSmart Settings** Membership Subscriptions Membership Subscription Terms PricebookRelations Contacts Products Price Books Instalments More

MemberSmart Settings

General Settings Stripe Settings Plaid Settings Engagement Score Settings **Scheduled Jobs Settings**

AUTOMATION CONTROLLER SETTINGS

Check for expired payment deadlines on failed Instalments and automatically transition them to Closed Rejected stage

☒ Run the MbrSmart.ExpiredInstalmentScheduler job
Active

Enable automatic renewal for membership subscriptions with auto-renewal

☒ Run the MbrSmart.RenewalScheduler job
Active

Enable sending renewal email notifications every day, 7 days before the membership expires

☒ Run the MbrSmart.MembershipRenewalEmailScheduler job
Active

Enable automatic deletion of error logs from the past 180 days

☒ Run the MbrSmart.LogCleanUpBatch job
Active

- ***Run the MbrSmart.ExpiredInstalmentScheduler job***
Check for expired payment deadlines on failed Instalments and automatically transition them to Closed Rejected stage
- ***Run the MbrSmart.RenewalScheduler job***
Enable automatic renewal for membership subscriptions with auto-renewal
- ***Run the MbrSmart.MembershipRenewalEmailScheduler job***
Enable sending renewal email notifications every day, 7 days before the membership expires
- ***Run the MbrSmart.LogCleanUpBatch job***
Enable automatic deletion of error logs from the past 180 days
- ***Run the MbrSmart.ReputationPointsScheduler job***
Enable awarding users reputation points based on configurations in the Reputation Points Settings
- ***Run the MbrSmart.InvoiceInstalmentScheduler job***
For invoice payments, automate instalment status changes and initiate invoice emails upon reaching the payment due date
- ***Run the MbrSmart.ProcessingPaymentsHandlerScheduler job***
Enable status changes for ACH and BACS transactions

- *Run the MbrSmart.RecurringPaymentsScheduler job*
Enable recurring payments charging for membership subscriptions

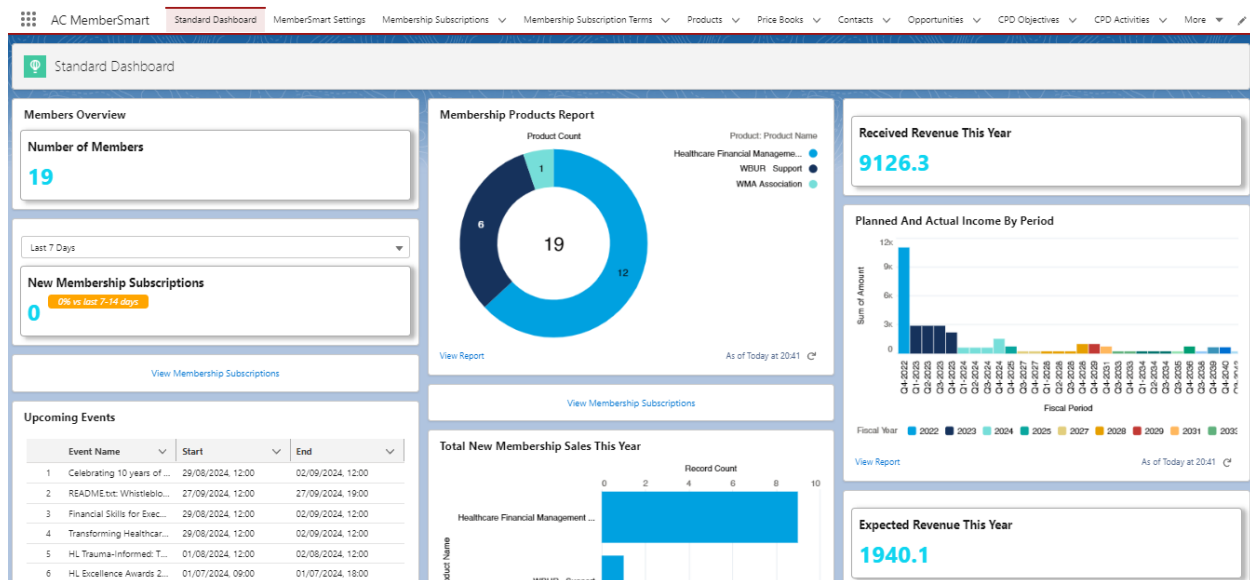
The jobs are enabled by default. Please disable the jobs you do not need.

Create a Membership Subscription

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

Here is a step-by-step process for creating a membership subscription.

Please make sure all the necessary objects are added to the navigation bar: Standard Dashboards, MemberSmart Settings, Membership Subscriptions, Membership Subscription Terms, Products, Price Books, Instalments, Opportunities, CPD Objectives, CPD Activities and Pricebook Relations.



1. Add a Product

The subscription process starts with creating a Product.

Note Before creating a product, please assign the “Membership Subscription” page layout 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.

New Product

Select a record type

☐

Main

☒

Membership Subscription

Cancel

Next

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

Fields to fill in:

New Product: Membership Subscription

* Product Name

Product Description

* Default Grace Period

- Product Name
 - Add Product Name (Name of Membership)
- Add Product Description
 - Add product description
- Default Grace Period
 - Define how many days members can be subscribed without providing payment

- Numbers entered in the Grace Period field are automatically rounded
- Is Subscription Product
 - The checkbox is filled in automatically when creating a Product with Membership Subscription record type

Add subscription info:

Subscription Info

*** Membership Lengths**

Available	Chosen
1 Year	
2 Years	
3 Years	

*** Subscription Plans**

Available	Chosen
Calendar	
Termed	

*** Payment Frequencies**

Available	Chosen
Month	
Quarter	
Semi-Annual	
Annual	
Whole Period	

*** Renewal Forms**

Available	Chosen
Manual	
Auto-Renewals	

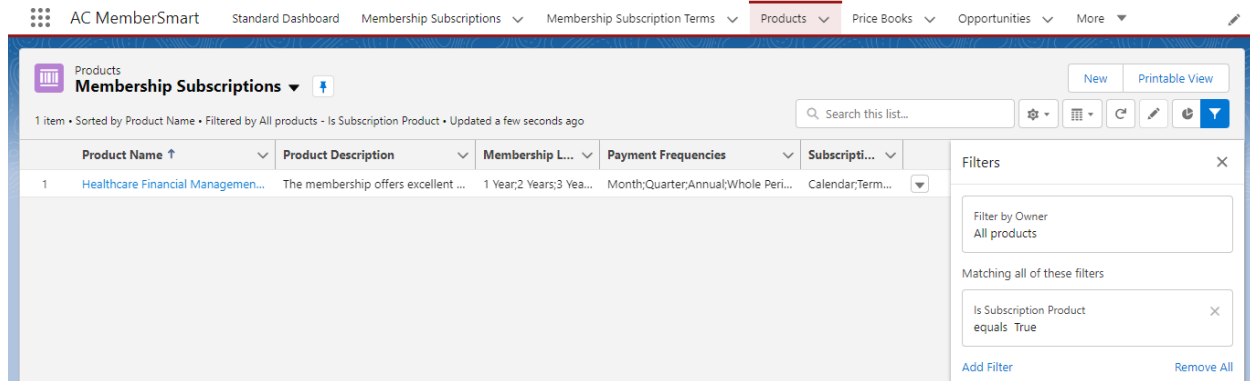
- Membership Length
 - Add all options to let members decide if they'd prefer to subscribe for a membership for one year, two years or three years, or choose only one option if needed
- Subscription Plans
 - Assign a subscription plan to your product (**select one option**):

- If Plan=Termed,
 - Start Day = current date
 - End Date = Start Date + chosen Membership Length
 - If Plan=Calendar,
 - Start Day = first day of the 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

The screenshot displays the 'AC MemberSmart' interface. At the top, there's a navigation bar with tabs: 'Standard Dashboard', 'Membership Subscriptions', 'Membership Subscription Terms', 'Products' (selected), 'Price Books', 'Opportunities', and 'More'. Below the navigation bar, the header shows 'Product Healthcare Financial Management Association' with buttons for '+ Follow', 'New Contact', 'New Opportunity', and 'New Case'. The main content area is divided into 'Related' and 'Details' tabs. Under 'Details', there are two columns of fields:

Product Name Healthcare Financial Management Association	Active ☒
Product Description The membership offers excellent benefits for covering all your needs as a member.	Visible in Community ☒
Default Grace Period 1	Is Subscription Product ☒
Subscription Info	
Membership Lengths 1 Year:2 Years:3 Years	Subscription Plans Calendar:Termed
Payment Frequencies Month:Quarter:Annual:Whole Period	

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



2. Add Product To Pricebook

Pricebook defines the subscription fee for your membership product.

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

Add to Price Book

Price Book

1 Year Membership

Currency

USD

Cancel

Next

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

3. Configure Subscription to Pricebook Relation

To configure a membership subscription fee, go to the Pricebook Relation tab.

When determining a subscription fee, we need to take into account that the price can depend on different parameters like Subscription Term Length, User Location, Contact Type, etc.

Pricebook Relation is a relation between different parameters and Pricebook Id that corresponds to these parameters.

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

To create a new relation dependent on the subscription term length (membership length), click “New”:

New PricebookRelation

Information

Title

Owner

 Catherine Pavlenko

Name

Price Book



Subscription Length

Cancel

Save & New

Save

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.

The screenshot displays the 'Details' tab of a 'PricebookRelation' record with ID 'PR-000'. The form includes the following fields:

- Name:** PR-000
- Price Book:** Price Book for 1 Year Length (with a picklist icon)
- Subscription Length:** 1 Year (with a picklist icon)
- Owner:** User User (with a user icon)
- Created By:** User User, 12/04/2023, 00:11 (with a user icon)
- Last Modified By:** User User, 12/04/2023, 00:11 (with a user icon)

Configure more complex Membership Subscription to Pricebook Relation as described in the [Configure Membership Subscription Fee](#).

4. Create Membership Subscription

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”

Information

Title

Paid Through Date

* Name

Start Date

Account

Search Accounts... 

End Date

Contact

Search Contacts... 

Term Count

0

Product

Search Products... 

Is Individual

☒

Grace Period

0

Is Cancelled

☐

* Renewal Form

Manual 

Owner

 Catherine Pavlenko

Cancel

Save & New

Save

Fill in the fields:

- Name
 - Enter a name in the following format:
Product name: Contact name (e.g. HFMA Association: Katie Johnson)
- Account
 - 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
- Renewal Form
 - Select the renewal form for the membership subscription.
- Is Individual
 - Automatically filled in when the type of the subscription is an individual subscription
- Term Count
 - Displays the number of existing membership subscription terms
- 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** any fields after the membership subscription is created.

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

New List View

* List Name

Membership Subscriptions

* List API Name 

Membership_Subscriptions

Who sees this list view?

- ☐ Only I can see this list view
- ☒ All users can see this list view 
- ☐ Share list view with groups of users 

Cancel

Save

5. Create Membership Subscription Terms

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.

AC MemberSmart Standard Dashboard Membership Subscriptions Products Price Books Contacts Payments Op

Membership Subscription
Katie Johnson - HFMA Gold

Related Details

Membership Subscription Terms (1) New

Name	Title
ST-057	Katie Johnson - HFMA Gold - Annual

[View All](#)

From the Membership Subscription record, go to the *Related* tab and click *New* on the Membership Subscription Terms object.

New Membership Subscription Term

Information

Name

*Title
Healthcare Financial Management Association: Katie John: ↺

*Payment Frequency
Annual ▼

*Membership Length
1 Year ▼

*Payment Form
Auto-Renewals ▼

*Plan
Termed ▼

*Membership Subscription
 Healthcare Financial Management Association: Kati X

Owner
 Dagmara Khasueva

Fill in:

- Name
 - Automatically generated number field

- Title
 - Enter Title 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
 - Define Payment Frequency
- Membership Length
 - Define Membership Length
- Payment Form
 - Define Payment Form
When registering from the community, “Auto-Renewals” option is selected by default
- Plan
 - Select Plan
- Membership Subscription
 - Select Membership Subscription
- 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.

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

Opportunity Contact Roles (2)			
a0s1Q00000Kialw 2023-11-01 Registration Person Account		a0s1Q00000Kialw 2023-11-01 Registration Person Account	
Stage:	New	Stage:	Closed Collected
Amount:	\$500.00	Amount:	\$500.00
Close Date:	01.05.2024	Close Date:	29.11.2023

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.

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.

8. Member Status of the Contact

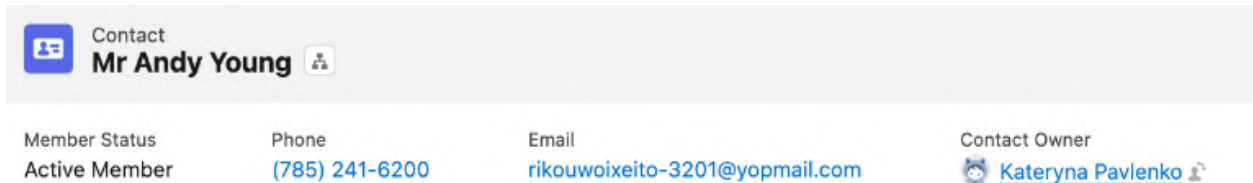
The “Member Status” picklist field is displayed on the contact record.

- “Active” status is displayed when a user registers as a member (purchases a subscription).
- “Non-Member” status is displayed on the unregistered newly created contacts.
- Blank status is displayed on the contacts that already existed on the org when the AC MemberSmart package was installed.

The behaviour of the field

For individual membership: If the contact has at least one membership subscription, he is considered an active member.

For organizational membership: all the contacts under the organization (account) that has a subscription are considered active members, including new Contact created under the Account.



Contact
Mr Andy Young

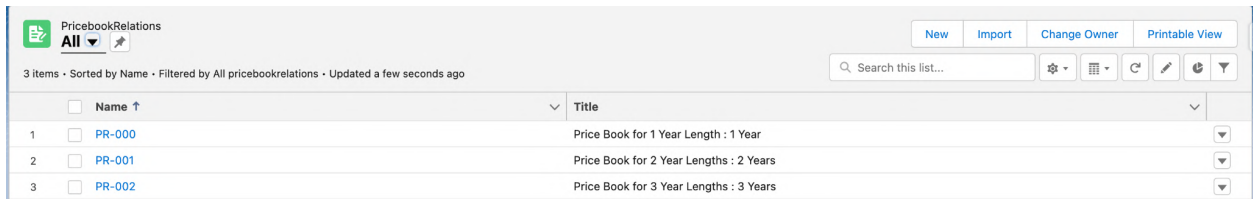
Member Status: Active Member
Phone: (785) 241-6200
Email: rikouwoxeito-3201@yopmail.com
Contact Owner: Kateryna Pavlenko

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.

Configure Membership Subscription Fee

To configure a membership subscription fee, go to the Pricebook Relation tab.



PricebookRelations
All

3 items • Sorted by Name • Filtered by All pricebookrelations • Updated a few seconds ago

Search this list...

	Name ↑	Title
1	PR-000	Price Book for 1 Year Lengths : 1 Year
2	PR-001	Price Book for 2 Year Lengths : 2 Years
3	PR-002	Price Book for 3 Year Lengths : 3 Years

When determining the subscription fee, we need to consider that the price can vary based on different parameters such as Subscription Term Length, User Location, Contact Type, etc.

Pricebook Relation is a relationship between these various parameters and the Pricebook ID that corresponds to them.

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

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.

 PricebookRelation
PR-002

Related

Details

Title	Owner
1 Year : 1 Year	 Catherine Pavlenko
Name	
PR-002	
Price Book	
1 Year	
Subscription Length	
1 Year	
Created By	Last Modified By
 Catherine Pavlenko, 24.04.2023, 14:23	 Catherine Pavlenko, 24.04.2023, 14:23

Configure Custom Subscription Length and Payment Frequency

Currently, it affects internal logic only.

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.

Restrictions:

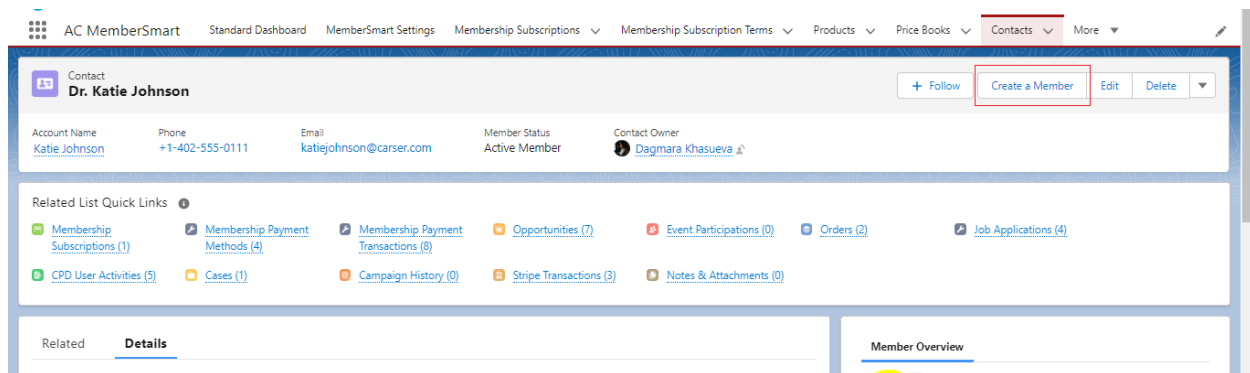
- If the selected Subscription Length/Payment Frequency is not an integer number (e.g., 9 months/6 months), refrain from choosing these Payment Frequencies for the selected Length; otherwise, an exception will be thrown.
- If the Payment Frequency is greater than the Custom Length (e.g., 12 months >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

Internal Wizard For Assigning Membership Subscriptions To Users

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

On the Contact record, 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.

Create a Member

You are going to create a membership subscription for **Katie Johnson**

* Please, select a membership product

--None--

Define the grace period for subscription in days

0

Next

Fields:

- *Please, select a membership product*

Displays all the products with the Membership Subscription record type.

- *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.

Screen 2: Company or Person screen.

Create a Member

Personal or Company subscription

Would you like register as person or as company?

☒ Is Person

☐ Is Company

Previous

Next

Fields:

- *Would you like to register as a person or as a company?*

Please select the appropriate option - individual or organisational subscription.

Screen 3: Existing or New Account.

Create a Member

Existing or New Account

Do you prefer to assign the subscription to the current account or create a new one?

- ☒ Current Account: **Katie Johnson**
☐ Create a New Account

[Previous](#)[Next](#)

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 4: Create a New Account.

Create a Member

* Company Name

Complete this field.

Address

Street

City

State/Province

Zip/Postal Code

Country

Please upload your qualification document



Upload Files

Or drop files

[Previous](#)[Next](#)

Fields:

- *Company Name*

Create the Account name

- *Address*

Fill in the address

- *Please upload a file*

Drop or upload files

Screen 5: Membership Length.

Create a Member

Choose your membership length

1 Year Membership	900 GBP
2 Years Membership	1499 GBP
3 Years Membership	1899 GBP

Previous Next

Select a membership length. The prices are sorted from low to high.

Screen 6: Payment Frequency.

Create a Member

Choose your payment frequency

Monthly	75 GBP
Quarterly	225 GBP
Annually	900 GBP
Whole Period	900 GBP

[Previous](#)[Next](#)

Select how frequently to pay for the membership. The prices are sorted from low to high.

Screen 7: Preferred Renewal Flow.

Create a Member

Choose the preferred renewal flow

How do you prefer to renew the membership?

- ☒ Renew automatically
☐ Renew manually

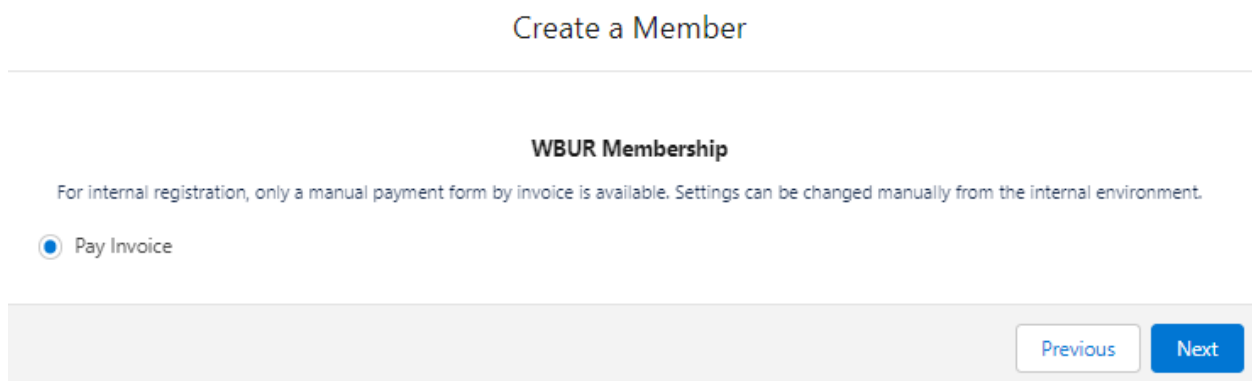
[Previous](#)[Next](#)

Fields:

- *How do you prefer to renew the membership?*

Select the appropriate option. The screen won't appear to a user if only one value is selected on the Product object – Renewal Forms field.

Screen 8: Payment Methods.



For internal registration, only a manual payment form by invoice is available. Settings can be changed manually from the internal environment.

Screen 9: Success.

Text: Congratulations, the membership subscription is successfully created! An invoice will be sent via email.

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:

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.

New CPD Objective

Information

* Name

* Start Date

* End Date

Required Points

Is Active

☐

Owner

 Dagmara Khasueva

Description

Salesforce Sans ▾ 12 





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

- 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

The screenshot displays the 'AC MemberSmart' dashboard with a navigation bar at the top. The main content area is titled 'CPD Objective COVID-19: Patient Management'. Below the title, there are tabs for 'Related' and 'Details', with 'Details' being the active tab. The 'Details' section contains a form with the following fields:

Name	COVID-19: Patient Management	Required Points	40
Start Date	01/05/2022	Is Active	☒
End Date	31/05/2022	Owner	Dagmara Khasueva
Description	The management of COVID-19 is fraught with difficulties and we continue to learn how best to manage cases from the emerging literature. Similarly, some aspects of management are contentious in the absence of evidence relating to therapeutic strategies such as hydroxychloroquine, ritonavir/lopinavir etc. This module is therefore designed to draw upon the relevant published literature and guidance relating to case identification and management strategies. As before, the cases illustrate knowledge up to the time of writing and, we fully expect that this knowledge will change and adapt as science becomes more familiar with the management of the condition.		

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.

New CPD Activity

Information

* Title

COVID-19: Evidence of Management

* CPD Objective

★

 COVID-19: Patient Management

Description

questions, will assess your knowledge on the interpretation of this data, as well as the synthesis of this evidence into clinical scenarios.

* CPD Points

10

* Type

Course

Owner

Dagmara Khasueva

Cancel

Save & New

Save

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

- 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.

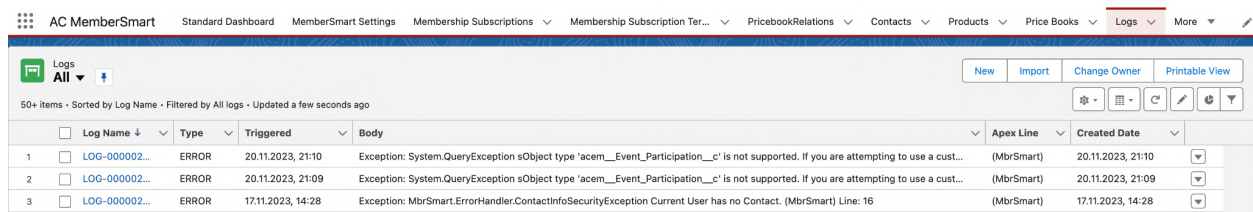
Please do not forget to go back and activate the CPD Objective.

See how to set up CPD on the Experience Cloud site [here](#).

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.



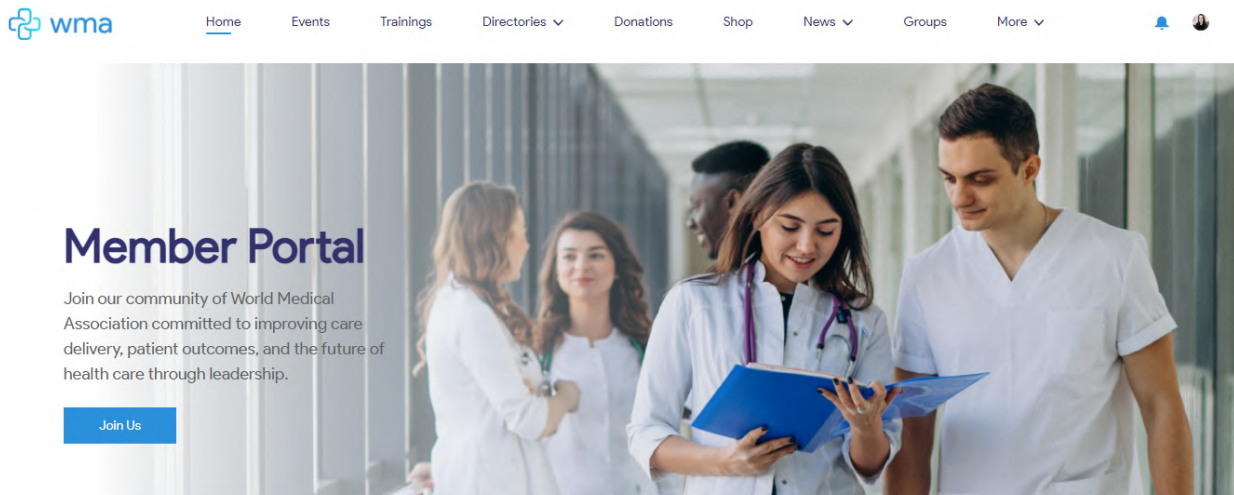
The screenshot shows the Salesforce interface for the 'Logs' tab. The table displays log records with columns for Log Name, Type, Triggered, Body, Apex Line, and Created Date. The first three records are error logs from November 20, 2023, and the third record is from November 17, 2023.

	Log Name	Type	Triggered	Body	Apex Line	Created Date
1	LOG-000002...	ERROR	20.11.2023, 21:10	Exception: System.QueryException sObject type 'acem__Event_Participation__c' is not supported. If you are attempting to use a cust...	(MbrSmart)	20.11.2023, 21:10
2	LOG-000002...	ERROR	20.11.2023, 21:09	Exception: System.QueryException sObject type 'acem__Event_Participation__c' is not supported. If you are attempting to use a cust...	(MbrSmart)	20.11.2023, 21:09
3	LOG-000002...	ERROR	17.11.2023, 14:28	Exception: MbrSmart.ErrorHandler.ContactInfoSecurityException Current User has no Contact. (MbrSmart) Line: 16	(MbrSmart)	17.11.2023, 14:28

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

Member Portal Setup

The key tool for member engagement is the member portal.



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

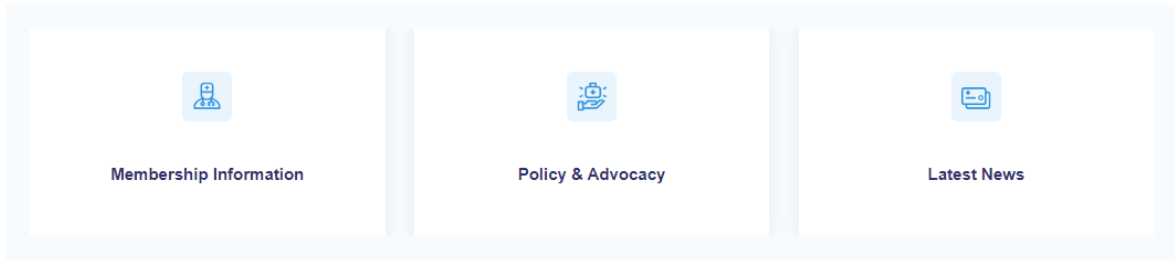
Set Up Self-Service Member Registration

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

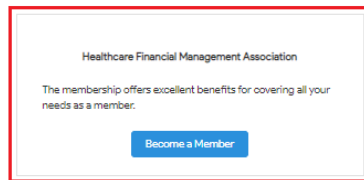
Set up your home page by adding the Member Registration component that evokes a Member Registration flow, or renew/cancel the subscription flow if the user is already a member.

Welcome to the world's premier organization!

For more than 40 years, we have helped doctors develop their leadership skills through education, career development and thought leadership, by providing a supportive community of peers.



Join Us!



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.

Join Us!

Healthcare Financial Management Association

The membership offers excellent benefits for covering all your needs as a member.

[Become a Member](#)

- The component has the following properties:

Member Registration

* Product ID

01t09000007bwxmAAA

New Subscription Flow API Name

Test_Flow

Renew Subscription Flow API Name

Test_Flow_Renew

Cancel Subscription Flow API Name

Test_Flow_Cancel

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)

Renew Subscription Flow API Name

- Filled in with the flow API name

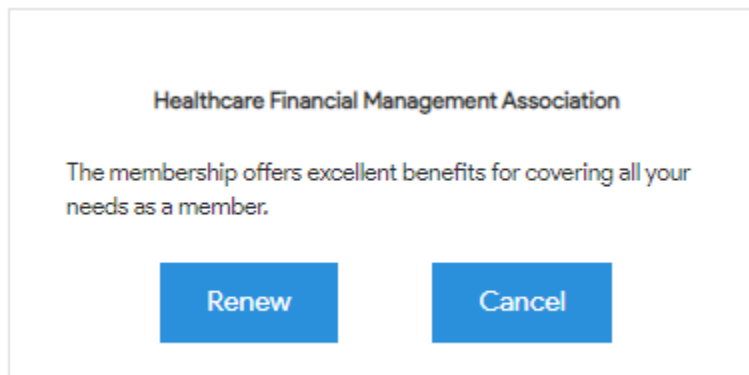
- The flow is evoked by “Renew” button (the button is hidden if the field is blank)

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)

- 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.

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.

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.

Personal or Company subscription

Would you like to register as a person or as a company?

☒ Is Person

☐ Is Company

[Previous](#)[Next](#)

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

Screen 3: Account or Contact Info

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:

Healthcare Financial Management Association

First Name

Katie

Last Name

Johnson

* Email

katiejohnson@mail.com

Address

Country

United Kingdom

Street

City

State/Province

—None—

Zip/Postal Code

Fields to fill in:

- First Name – contact first name
- Last Name – contact last name
- Email – contact email address
- Address – contact address
- Phone – contact phone
- Upload file

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:

Healthcare Financial Management Association

Account Information

* Company Name

Contact Information

* First Name

* Last Name

* Email

Address

Street

City

State/Province

Zip/Postal Code

Country

Fields to fill in:

- Company Name – account name
 - 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
- Email – primary contact email address
- Address – primary contact address
- Phone – primary contact phone number
- Upload file

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:

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

Existing or New Account

Do you prefer to assign the subscription to your current account or create a new one?

☒ Current Account: **Test**

☐ Create a New Account

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

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

Apple Community

Account Information

* Company Name

Apple Community

Address

Street

City

State/Province

Zip/Postal Code

Country

Please upload your qualification document

 Upload Files Or drop files

[Previous](#) [Next](#)

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

Screen 4: Membership Length

Choose your membership length

1 Year Membership	999 USD
2 Years Membership	1599 USD
3 Years Membership	1999 USD

[Previous](#) [Next](#)

The screen displays possible options defined on the product:

- Membership Length
- Subscription fees

Screen 5: Payment Frequency

Choose your payment frequency

☐
83.25 USD
Monthly

☐
249.75 USD
Quarterly

☒
999 USD
Annually

[Previous](#)[Next](#)

The component displays payment frequencies available for the selected product.

Screen 6: Renewal Form

Choose your preferred renewal flow

How do you prefer to renew your membership?

☒ Renew automatically

☐ Renew manually

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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”.

Screen 7: Select Payment Methods

Healthcare Financial Management Association

* How do you prefer?

- ☒ Pay now
- ☐ Pay later with the invoice

Previous

Next

Choose payment method. You won't be able to change the payment option once you proceed.

- Pay now
 - After choosing this method, Screen 7 with the payments component is opened
- Pay later with the invoice
 - After choosing this method, Screen 7 is skipped and Screen 8 is opened

Screen 8: Add New Payment Methods

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

Payment Methods

+ Add new Payment Method

Screen 9: 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)

STANDARD PAYMENT METHOD

INSTANT ACH PAYMENT

Card number	Expiration	CVC
1234 1234 1234 1234 	MM / YY	CVC 
Country		
Georgia 		

By providing your card information, you allow Advanced Communities to charge your card for future payments in accordance with their terms.

Fill in:

- Card number
- Expiration
- CVC
- Country
- Enable the “Attach Payment Method for future usage“ checkbox to save the payment method

- If the checkbox is unchecked, the modal window with the following message is displayed:

Not storing payment method may occur inconvenience

We want to bring an important matter to your attention regarding the checkbox for adding a payment method. We strongly recommend that you do not uncheck this checkbox for the following reasons:

- **Payment Method Security:** By keeping the checkbox checked, your payment method details are securely stored for future transactions. This ensures a convenient and hassle-free experience when making recurring payments or re-usage the method.
- **Smooth Recurring Payments:** Unchecking the checkbox will prevent the system from processing recurring payments automatically. This means you would need to manually initiate each payment, which could lead to delays or missed payments if not managed meticulously.

We understand that you may have concerns about storing your payment information. Please be assured that our systems are designed with the utmost security in mind, and we employ industry-standard encryption and privacy protocols to safeguard your sensitive data.

Acknowledged

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

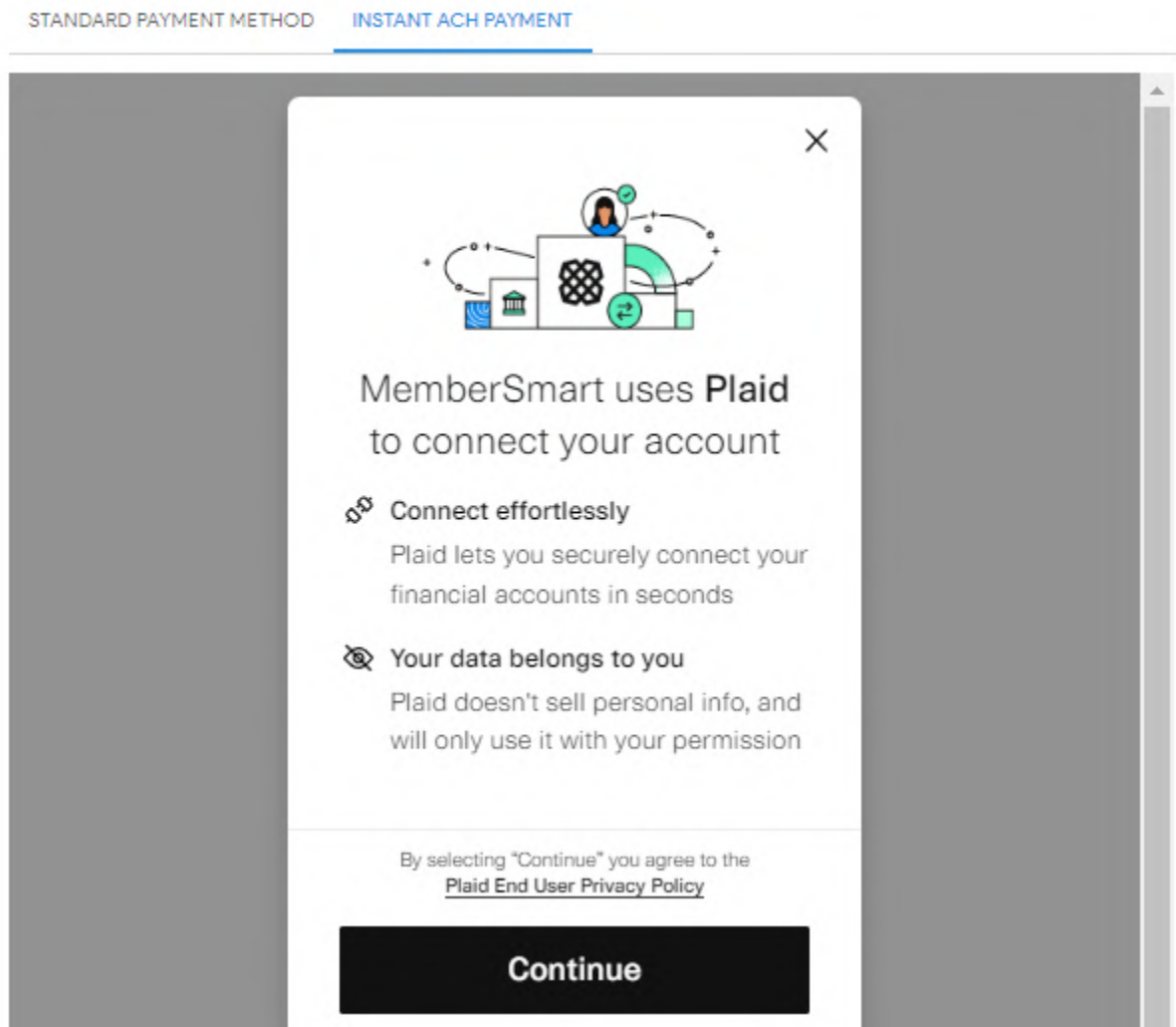
- Save

INSTANT ACH PAYMENT (ACH Direct Debit Payment Method)

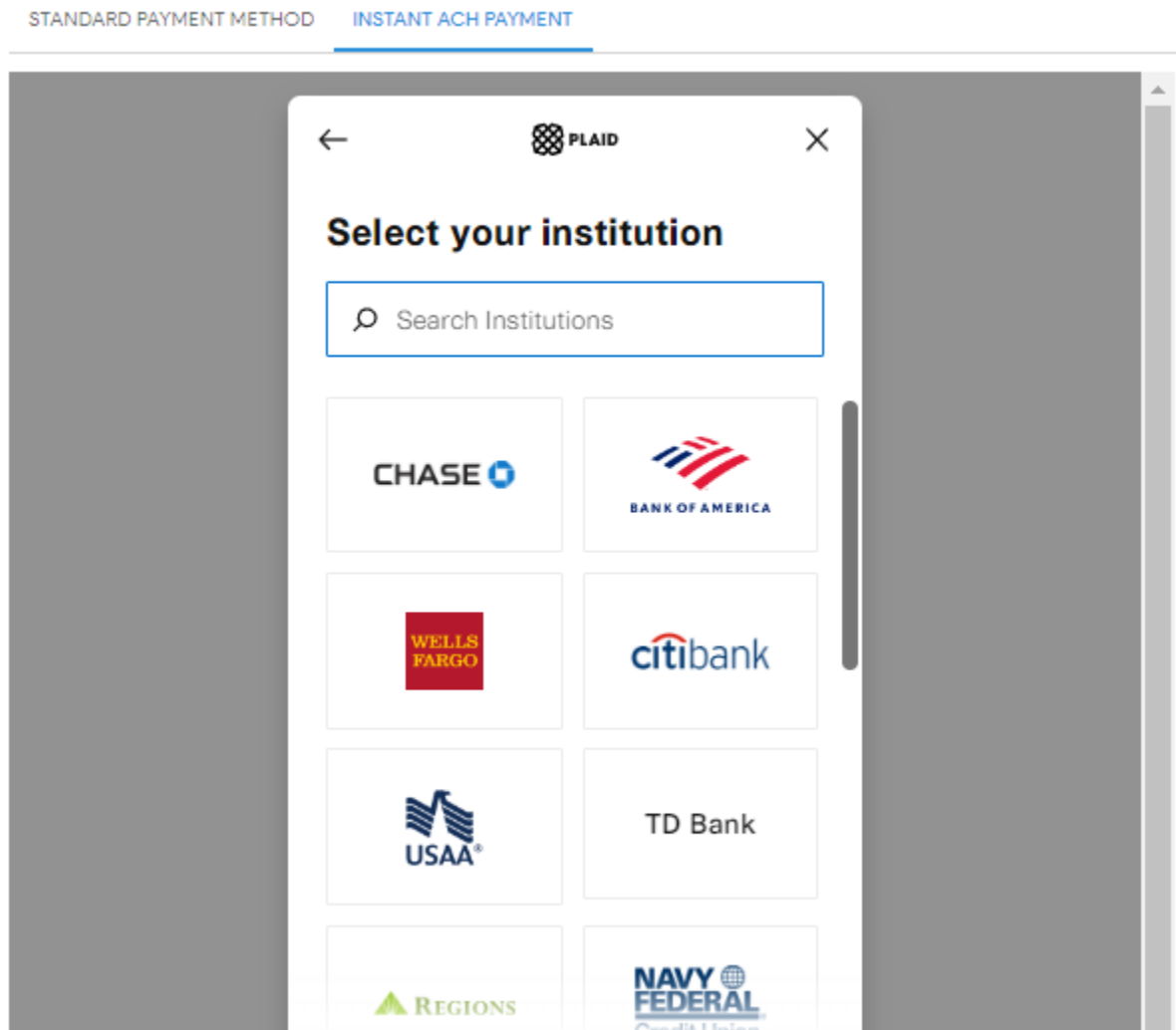
We use Plaid for connecting your bank account.

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

- Go to the INSTANT ACH PAYMENT tab



- Select your Bank



- Authenticate

STANDARD PAYMENT METHOD INSTANT ACH PAYMENT

←



×



Log in at Chase

After you log in, select the info below to share the required data with MemberSmart.

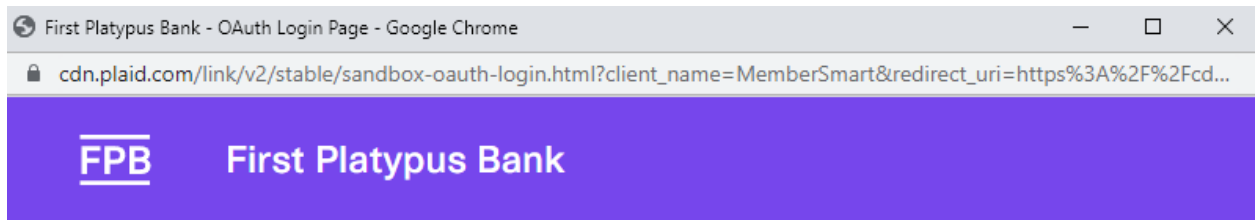
SELECT AT CHASE

☒

Checking or savings account

Continue to login

- Go through the Sign In process



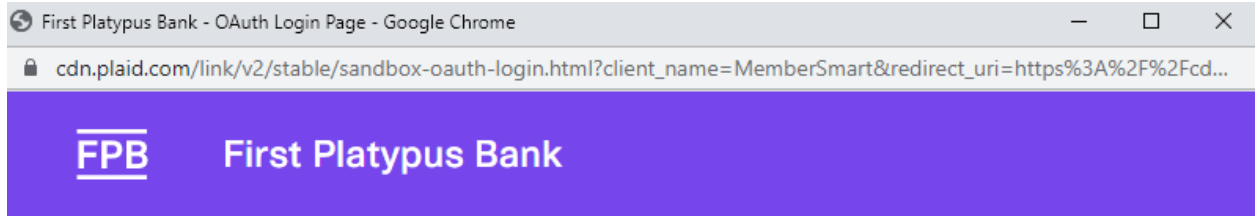
Sign in

Username

Password

Sign in

Simulate error



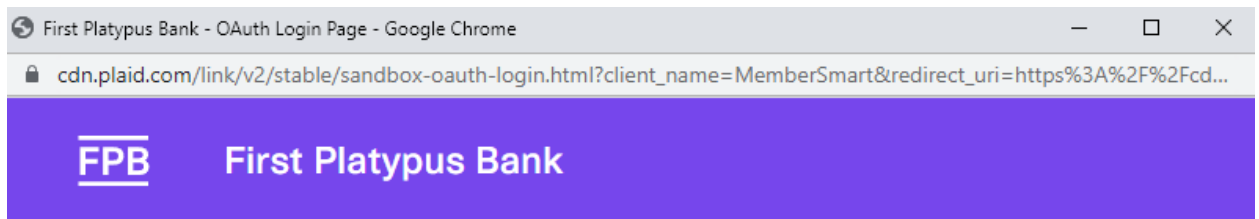
Verify your identity

How should we get in touch?

Tell us how

Mobile

Get code



Verification

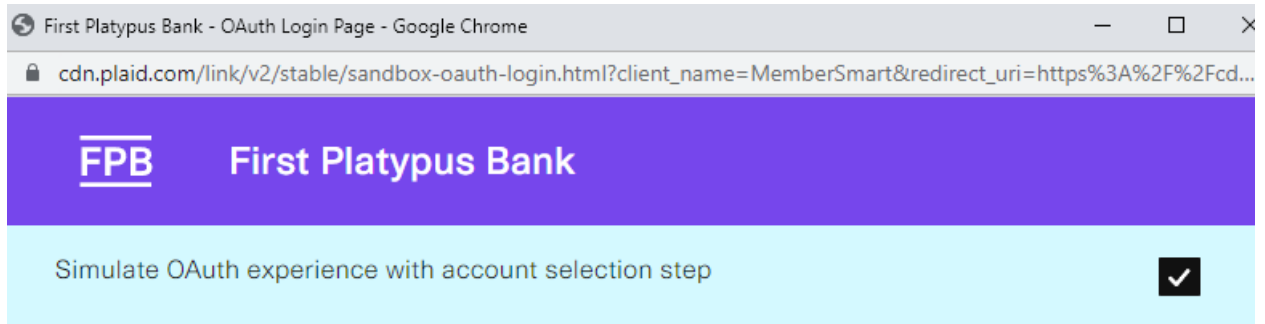
Enter the security code sent to ... 1111

Code

Code

Submit

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



Connect account information

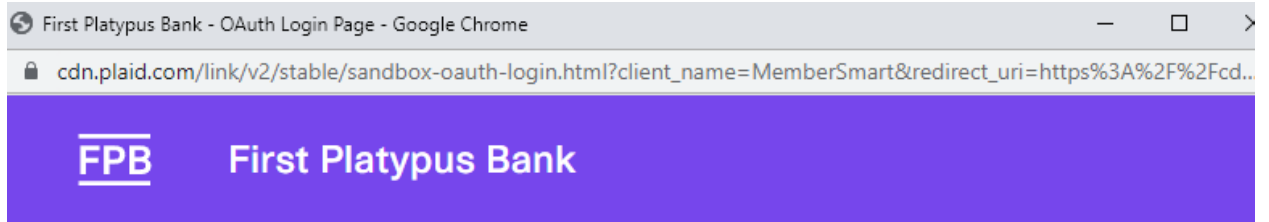
Select the accounts you want First Platypus to connect with Plaid. Please note that not all account information may be available for connecting at this time.

Select account(s) to share

☐ Plaid Checking
... .. 0000

☐ Plaid Saving
... .. 1111

- Confirm



Connect account information - Confirm

You have selected the following account information to connect with Plaid. To confirm, select **Connect Account Information**. You will be returned to the 3rd party service.

Cash accounts:

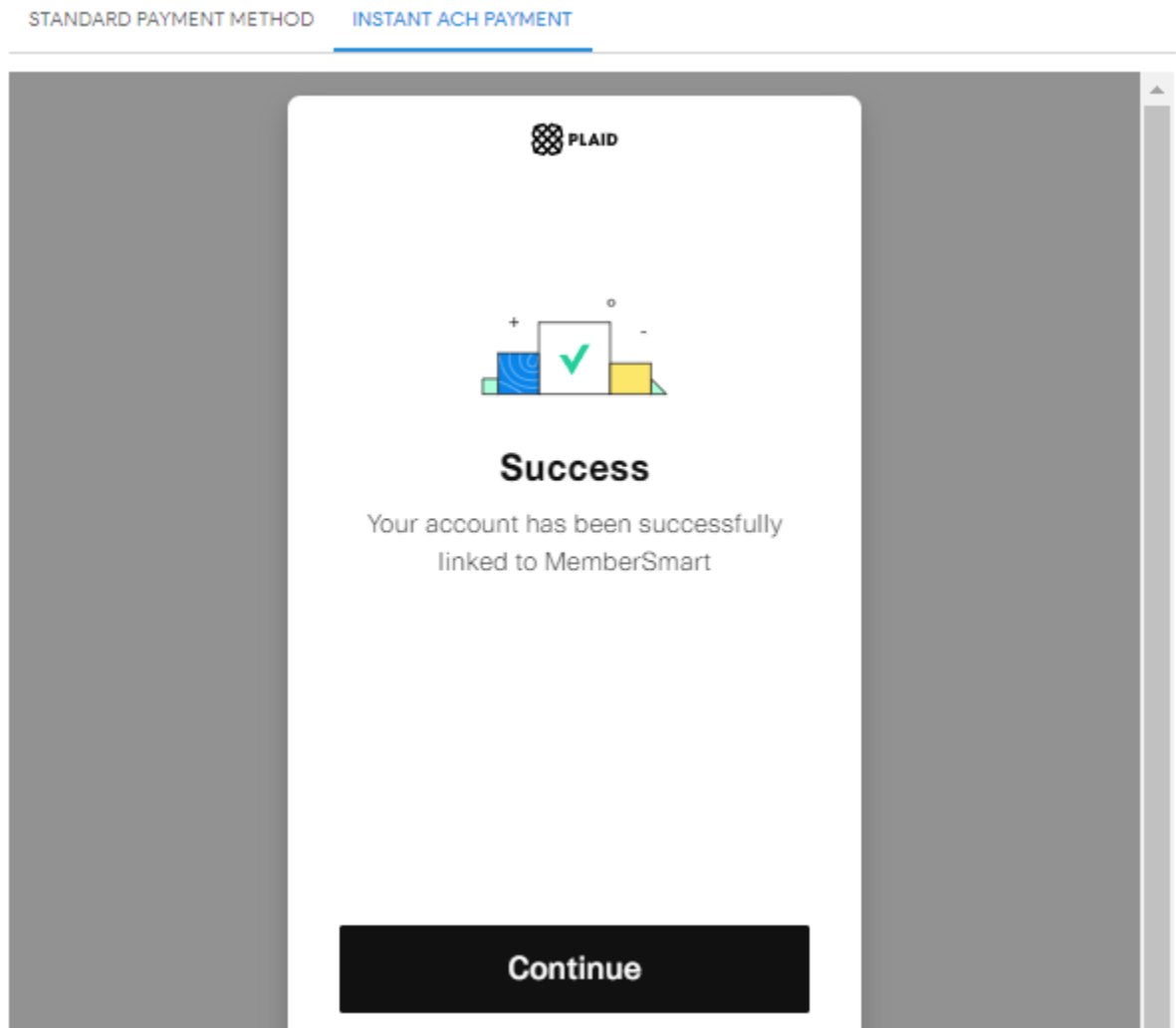
Plaid Checking 0000

Statements

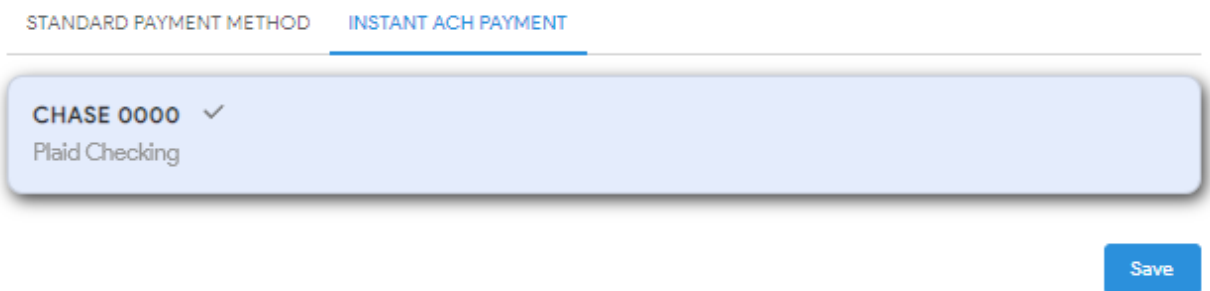
All of your checking, savings, mortgage, home equity, lines of credit, and credit card statements will be shared with the authorized third party as they become available online.

Profile Information

- See success message



- Select your account



- Save or go back and select another bank

[Go Back and Change Bank Account](#)

[Previous](#)

[Purchase](#)

BACS PAYMENT METHOD


Card


Bacs Direct Debit

Email

Sort code

Account number

Full name

Country or region

Address line 1

Fill in:

- Email
- Sort code
- Account number

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

Sort code
10-88
Account
00012
Full name
Dagm
Country
Georg
Address
addre
Address
12
Postal co

Confirm your Direct Debit details

Email dagmara.khasueva@advancedcomm...
Name on account Dagmara Khasueva
Sort code 10-88-00
Account number 00012345

An email will be sent to dagmara.khasueva@advancedcommunities.com within three business days to confirm the setup of this debit instruction.

Additionally, you will receive two days advance notice via email of any amount to be debited under this instruction. Payments will show as 'Stripe' on your bank statement.

Your payments are protected by the Direct Debit Guarantee.



Stripe, 7th Floor The Bower Warehouse
207-211 Old St, London EC1V 9NR
support@stripe.com

- Finish

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

Screen 10: Success

Confirmation:

- For the Pay now method:

Confirmation screen: Congratulations, you've successfully purchased the membership!

Toast message: Success! Subscription was purchased successfully! (Card); Your current payment is being processed (ACH/Bacs)

- For the Pay later with the invoice method:

Confirmation screen: Congratulations, the membership subscription is successfully created! We will send you an invoice via email.

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.

Renew Subscription Flow API Name

MbrSmart__Subscription_Renew

You can customize 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”.

The membership renewal steps are as follows:

Screen 1: Membership Length

Choose your membership length

1 Year Membership	999 USD
2 Years Membership	1599 USD
3 Years Membership	1999 USD

[Previous](#) [Next](#)

The screen displays possible options defined on the product:

- Membership Length
- Subscription fees

Screen 2: Payment Frequency

Choose your payment frequency

☐	☐
83.25 USD Monthly	249.75 USD Quarterly
☒	
999 USD Annually	

[Previous](#) [Next](#)

The component displays payment frequencies available for the selected product.

Screen 3: Success

Confirmation:

Congratulations, you've successfully purchased the membership!

Flow functionality with Person Accounts

Our flows are designed to seamlessly integrate with person accounts.

- Member Registration Flow:
 - In the Member Registration flow, specifically where Contact and Account records are generated, an additional pathway has been introduced. This pathway checks if Person Accounts are enabled, and if so, creates a corresponding Person Account record.
 - The Get Contact With Account element has been enhanced to include the capability to retrieve the Contact associated with the previously created Person Account.

- When Person Accounts are enabled, the Member Registration flow now presents a streamlined interface, displaying only one relevant option: "Is Company" or "Is Person."
A help text is displayed to help users to understand why only one option is displayed: "If the Person Accounts are enabled, only one option is available according to the account type". This message is visible exclusively to person accounts.

Personal or Company subscription

Would you like to register as a person or as a company? i

☒ Is Person

If the Person Accounts are enabled, only one option is available according to the account type X

Previous Next

- **Handling Individual Subscription with Person Accounts:**
With Person Accounts enabled at the organizational level, when creating an Individual Subscription, the functionality ensures that the Member Status field of the Person Account is updated, ensuring accurate data management.
- For person accounts, opportunities are displayed on the 'Opportunity Contact Roles' component in the related list.

Opportunity Contact Roles (2)			
a0s1Q00000Kialw 2023-11-01 Registration Person Account		a0s1Q00000Kialw 2023-11-01 Registration Person Account	
Stage:	New	Stage:	Closed Collected
Amount:	\$500.00	Amount:	\$500.00
Close Date:	01.05.2024	Close Date:	29.11.2023

- **Not Supported Scenarios:**
A user with a company account purchasing an individual membership.
A user with a personal account purchasing a company membership.
In case users attempt to purchase a membership with any of these scenarios, an error message will be sent 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.

New Page

Give your page a name and a URL.

* Name

CPD PAGE

* URL

/ cpd-page

API Name ⓘ

← Back

Create

Publish your changes.

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

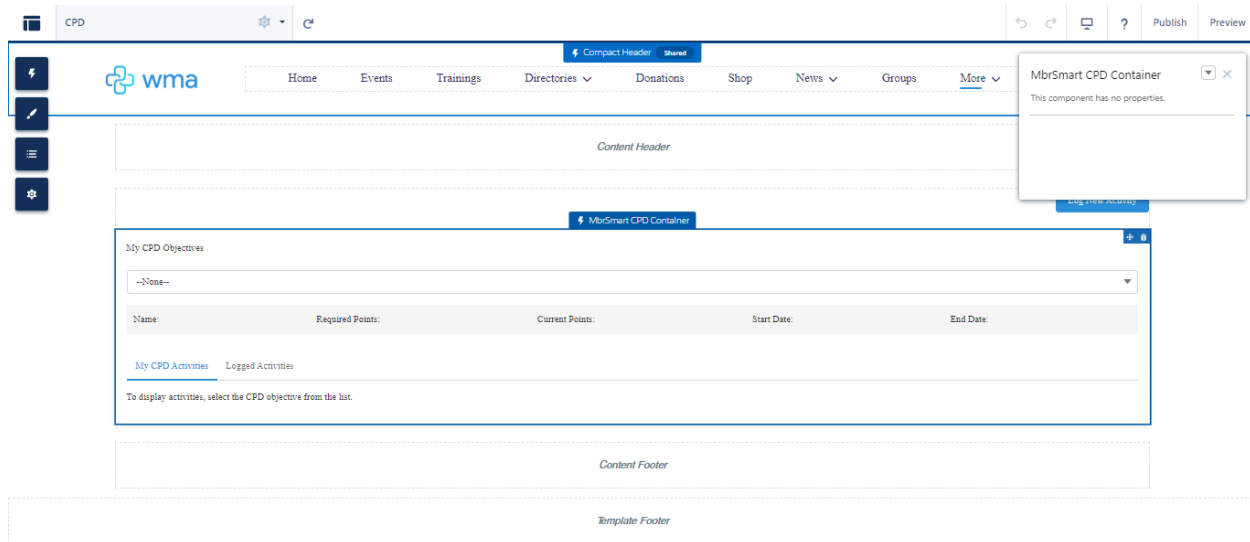
Add the following components to the page:

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



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

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

[Log New Activity](#)

My CPD Objectives

--None--

✓ --None--

COVID-19: Patient Management

Salesforce Administrator

You do not have logged activities yet

CPD Activities

Click on any objective to see activities assigned to it.

 Home Events Trainings Directories ▾ Donations Shop News ▾ Groups More ▾  

[Log New Activity](#)

My CPD Objectives

COVID-19: Patient Management ▾

Name: COVID-19: Patient Management	Required Points: 40	Current Points: 30	Start Date: 2022-08-16	End Date: 2026-07-31
------------------------------------	---------------------	--------------------	------------------------	----------------------

[My CPD Activities](#) [Logged Activities](#)

Name	Activity Type	Description	CPD Points	Status
COVID-19: Testing & Data Analysis	Course	This module is designed to assess knowledge around the testing of patients with suspected COVID-19 including the rt-PCR, lateral flow serology and ELISA. It also explores testing utilised to try to distinguish between acute bacterial and viral infection.	10	Completed

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
- 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:

Log New Activity

General Information

Add Attachments

* CPD Objective

CPD Objective - First

* Activity Type

--None--

* CPD Points

CPD points value is filled in automatically when choosing activity

* Time Spent

Use the format: 2h 30m

* Activity Taken Date

Cancel

Save and Next

- 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
- 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.

New Object Pages

Select an object to create the detail, list, and related list pages associated with it.

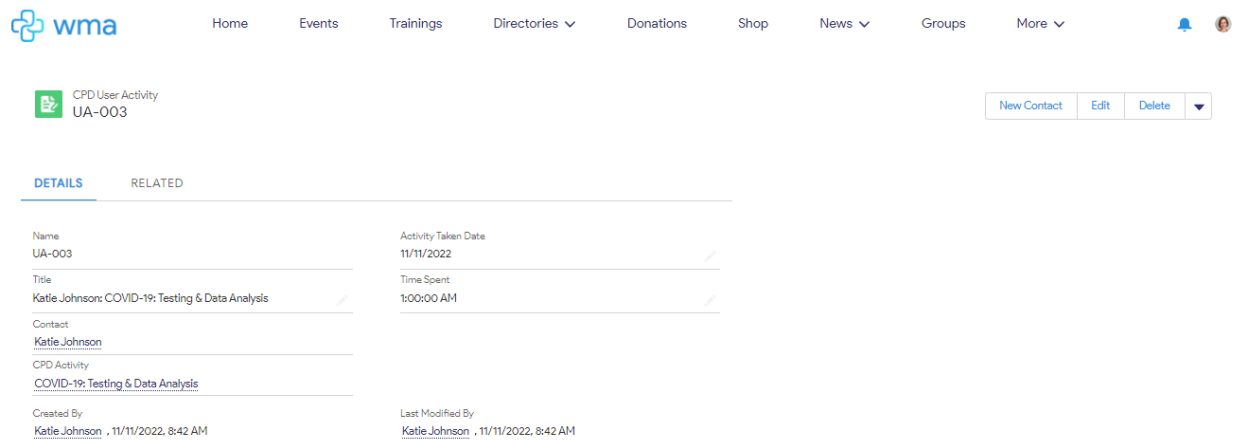
All ▼

CPD Activity

CPD Objective

CPD User Activity

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.

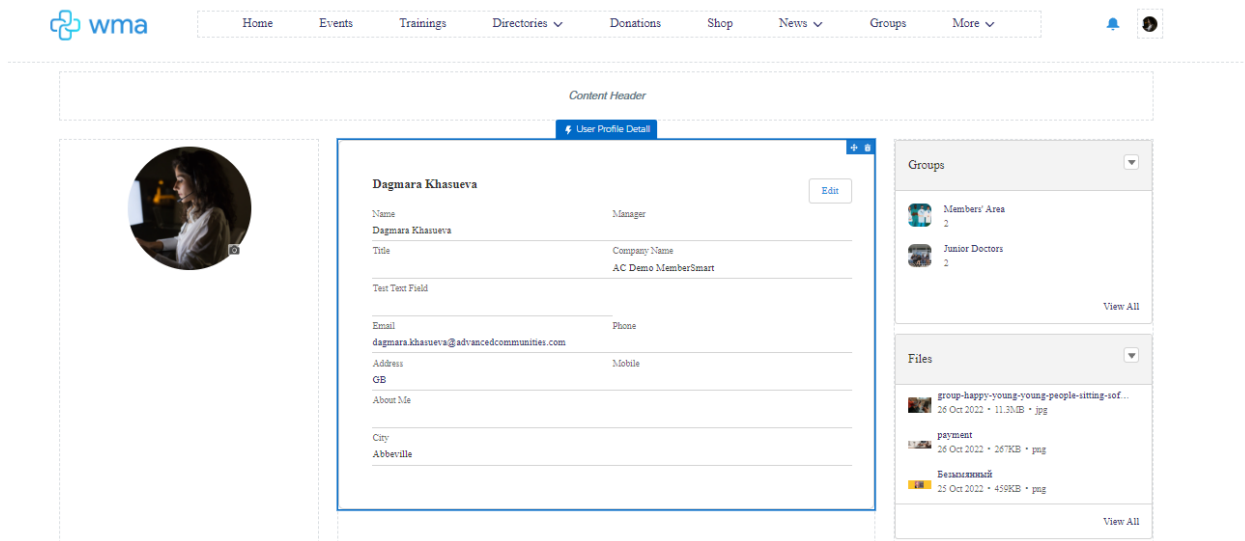
We provide two options: using the standard User Profile Detail component or using our custom Contact Information component for displaying contact fields on the User Profile page instead of user object fields.

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.



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.

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:

MbrSmart Contact Info



Record ID

{!recordId}

*Field Set Name

MbrSmart_Member_Default_Fieldset

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.

Contact Info

You do not have access to the record

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.



Send Message

Contact Details

Payment Methods

Membership Subscriptions

Katie Johnson

Contact Info

First Name	Katie	Last Name	Johnson
Email	katiejohnson@carser.com	Account Name	Katie Johnson
Description		Languages	English
Phone	+1-402-555-0111	Mobile	+1 973 377 7705

Billing Address

Account Name	Katie Johnson
Phone	+1-402-555-0111
Billing Address	101 Ecclesall Rd S London, L11 9PH UK
Shipping Address	95 Ecclesall Rd S L11 9PH United Kingdom London

Groups

 San Francisco Group
2

View All

Files

 photo_5323760732925444638_y
May 15, 2023 • 190KB • jpg

View All

Followers

 karljohnson

View All

Following

 Richard Morris

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:

MbrSmart Account Info



Record ID

{!recordId}

* Field Set Name

MbrSmart_Member_Default_Fieldset

Record ID - Leave the default value

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

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.

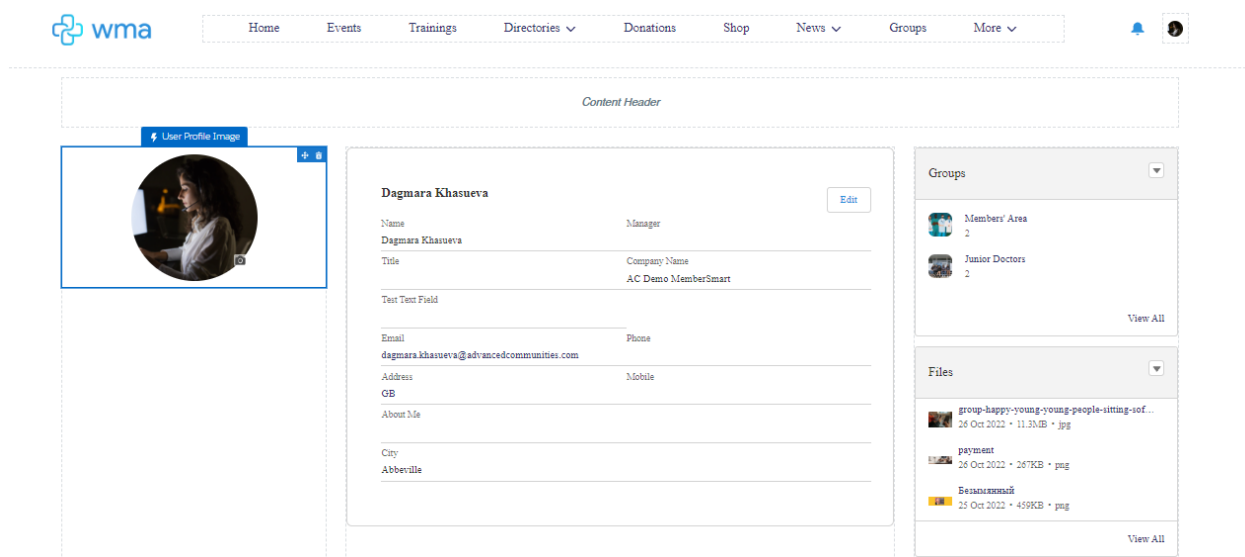
If users lack access to contact object, the message 'You do not have access to the record' will be displayed on the component. The same message is displayed in Builder for admin users.

Account Info

You do not have access to the record

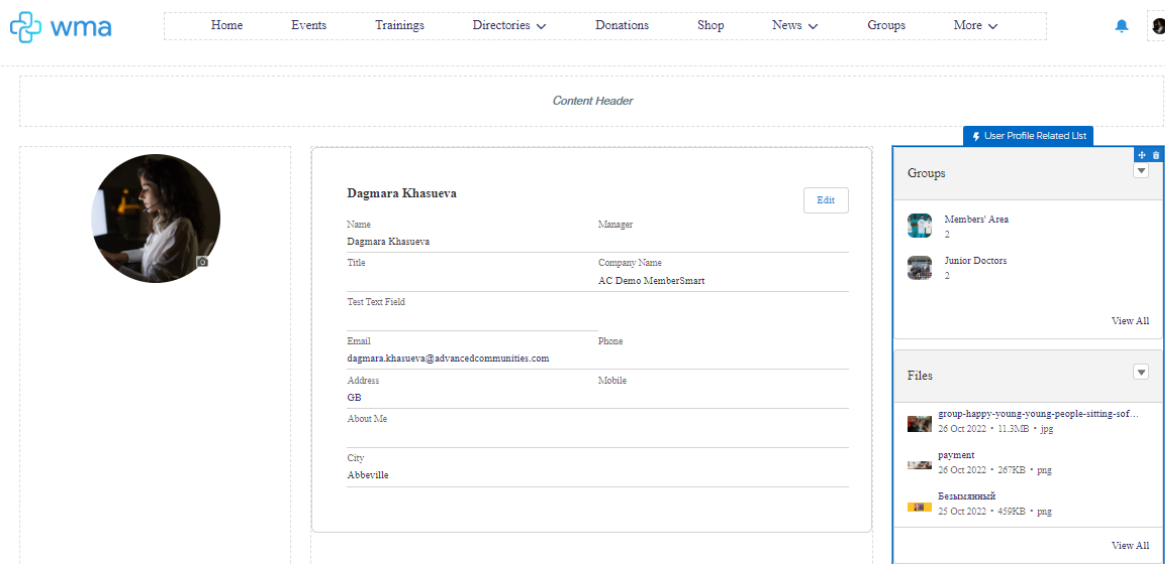
User Profile Image Component

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

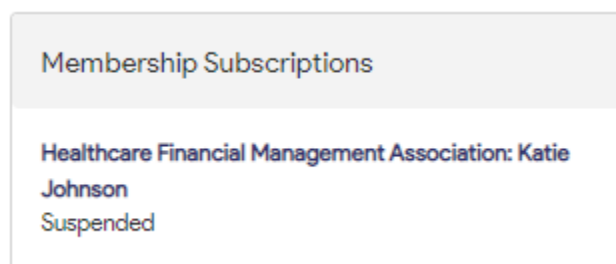
We recommend adding a standard User Profile Related List component to the User Profile page to display the related groups, files, followers, etc.



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 Component.

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

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.

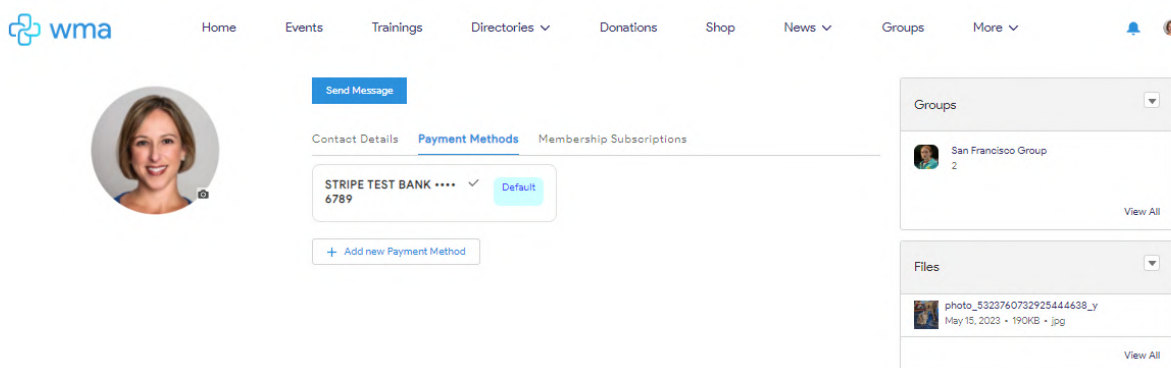
Payment Methods Manager Component

With this component, community users can manage their existing payment methods and create new ones from site. 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 organising 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.



The component has the following property:

MbrSmart Payment Methods
Manager

* Record Id

{!recordId}

Record id – required field, leave the default value

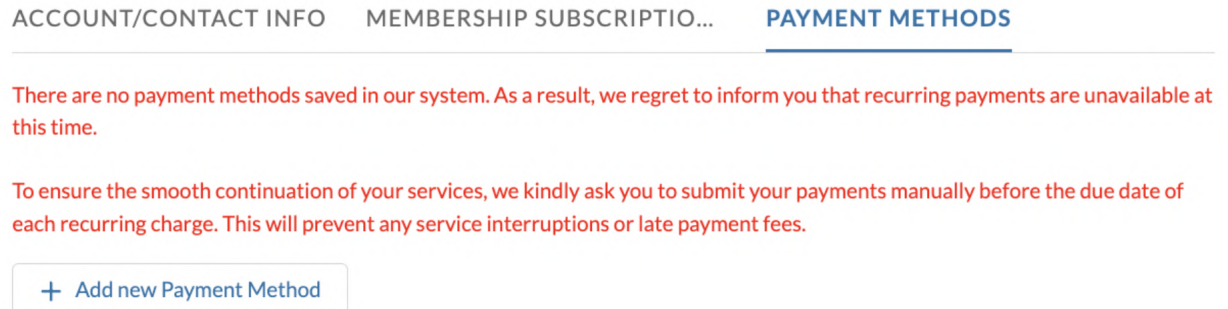
With the component, a user can:

- Create a payment method (Card, ACH)
- See the default method

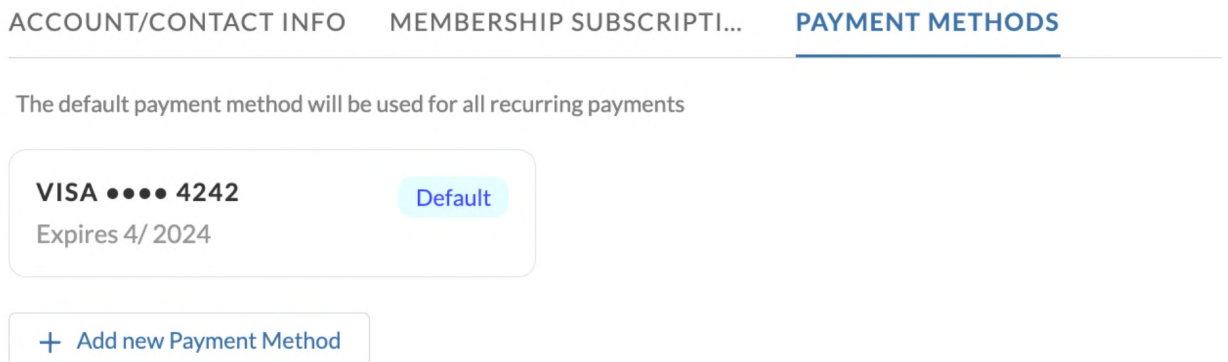
- Mark another payment method as default
- Delete payment method (if the payment method is not marked as default)

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 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)

STANDARD PAYMENT METHOD

INSTANT ACH PAYMENT

Card number	Expiration	CVC
1234 1234 1234 1234 	MM / YY	CVC 
Country		
Georgia 		

By providing your card information, you allow Advanced Communities to charge your card for future payments in accordance with their terms.

Fill in:

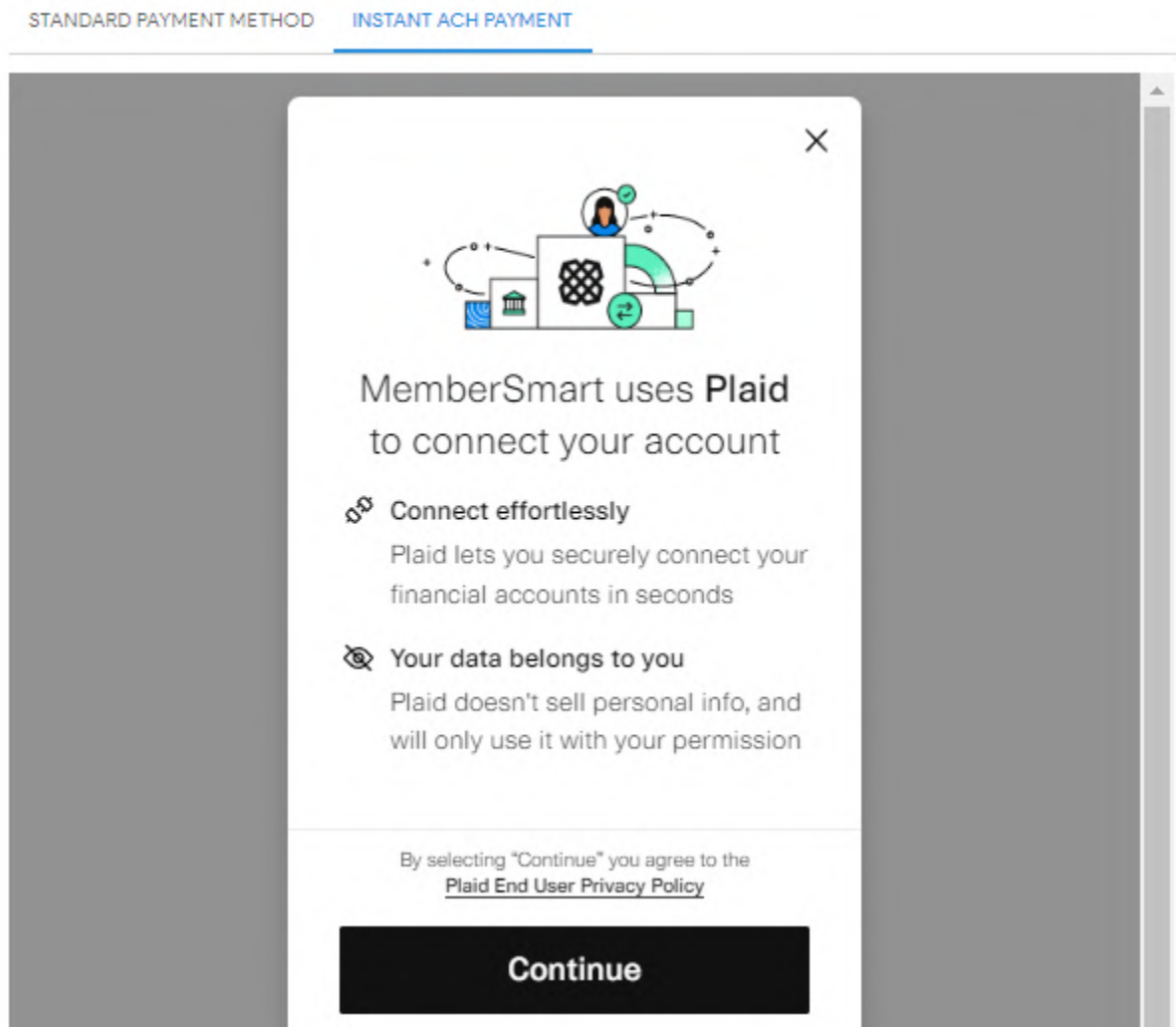
- Card number
- Expiration
- CVC
- Country
- Save

INSTANT ACH PAYMENT (ACH Direct Debit Payment Method)

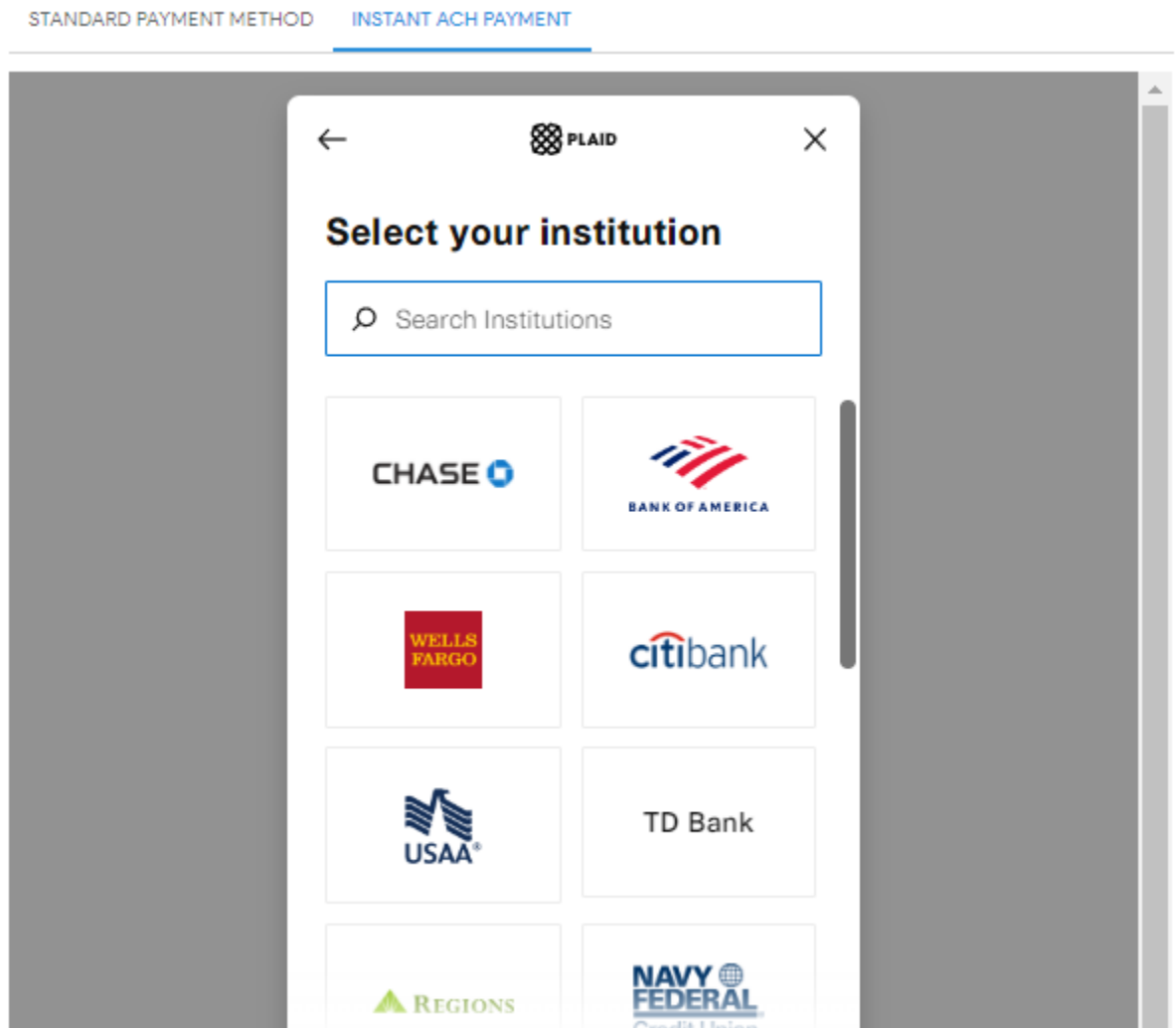
We use Plaid for connecting your bank account.

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

- Go to the INSTANT ACH PAYMENT tab



- Select your Bank



- Authenticate

STANDARD PAYMENT METHOD INSTANT ACH PAYMENT

←



×



Log in at Chase

After you log in, select the info below to share the required data with MemberSmart.

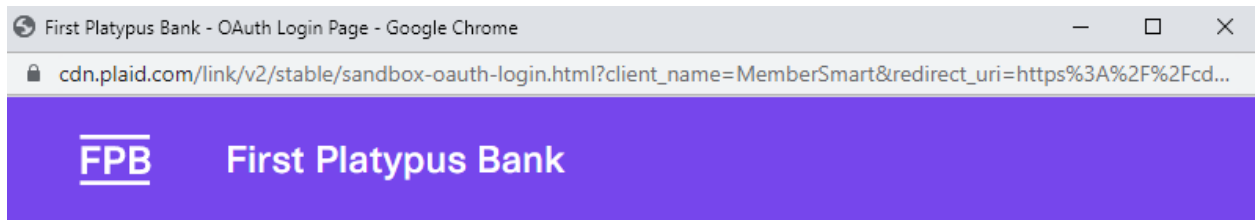
SELECT AT CHASE

☒

Checking or savings account

Continue to login

- Go through the Sign In process



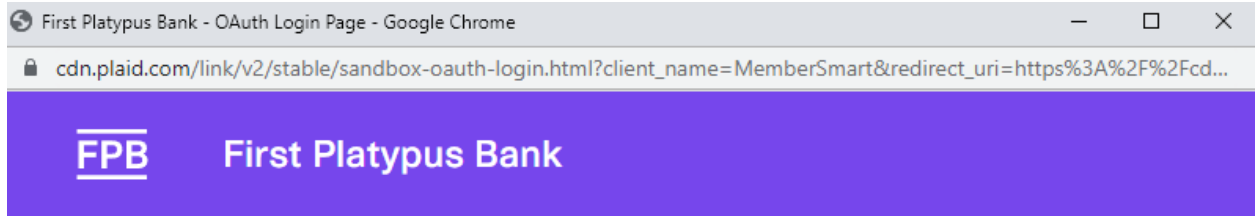
Sign in

Username

Password

Sign in

Simulate error



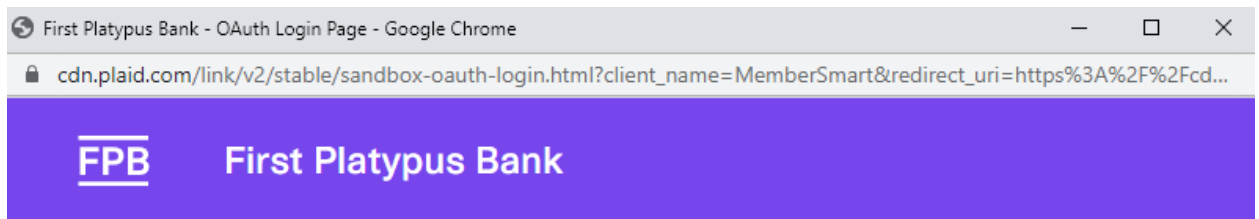
Verify your identity

How should we get in touch?

Tell us how

Mobile

Get code



Verification

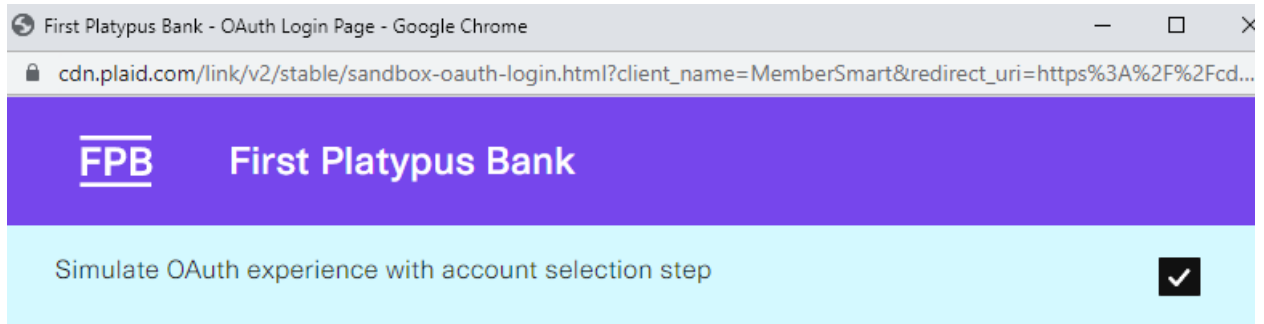
Enter the security code sent to ... 1111

Code

Code

Submit

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



Connect account information

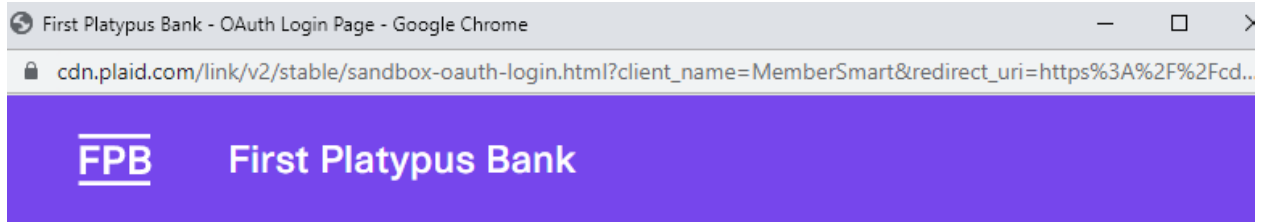
Select the accounts you want First Platypus to connect with Plaid. Please note that not all account information may be available for connecting at this time.

Select account(s) to share

☐ Plaid Checking
... .. 0000

☐ Plaid Saving
... .. 1111

- Confirm



Connect account information - Confirm

You have selected the following account information to connect with Plaid. To confirm, select **Connect Account Information**. You will be returned to the 3rd party service.

Cash accounts:

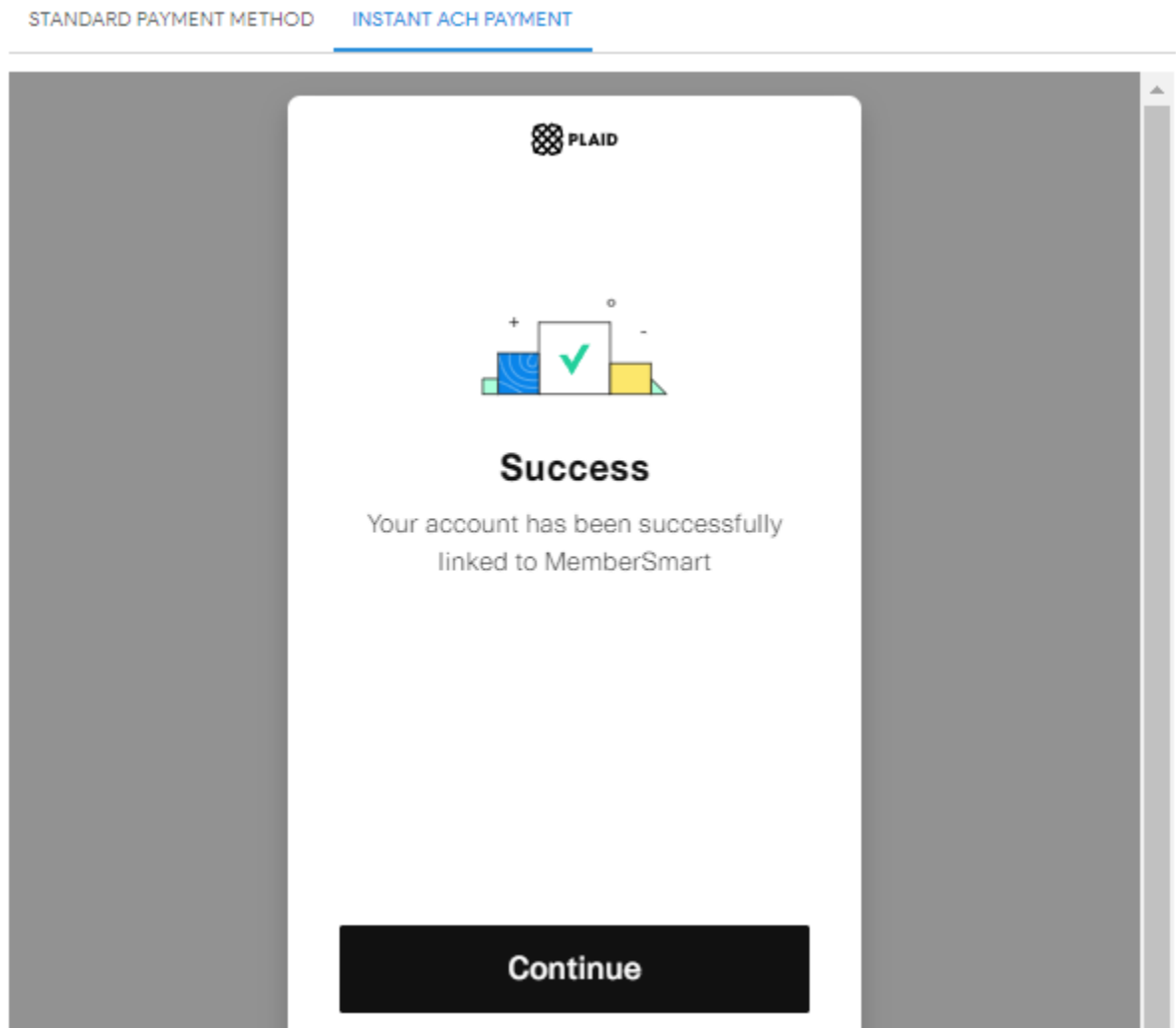
Plaid Checking 0000

Statements

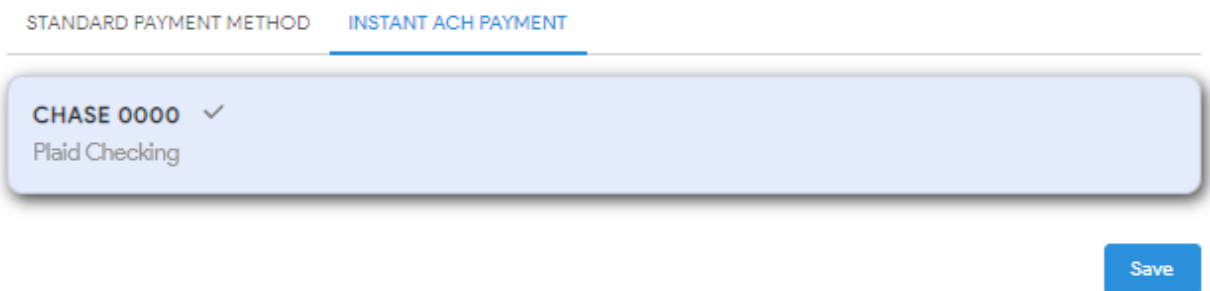
All of your checking, savings, mortgage, home equity, lines of credit, and credit card statements will be shared with the authorized third party as they become available online.

Profile Information

- See success message



- Select your account



- Save

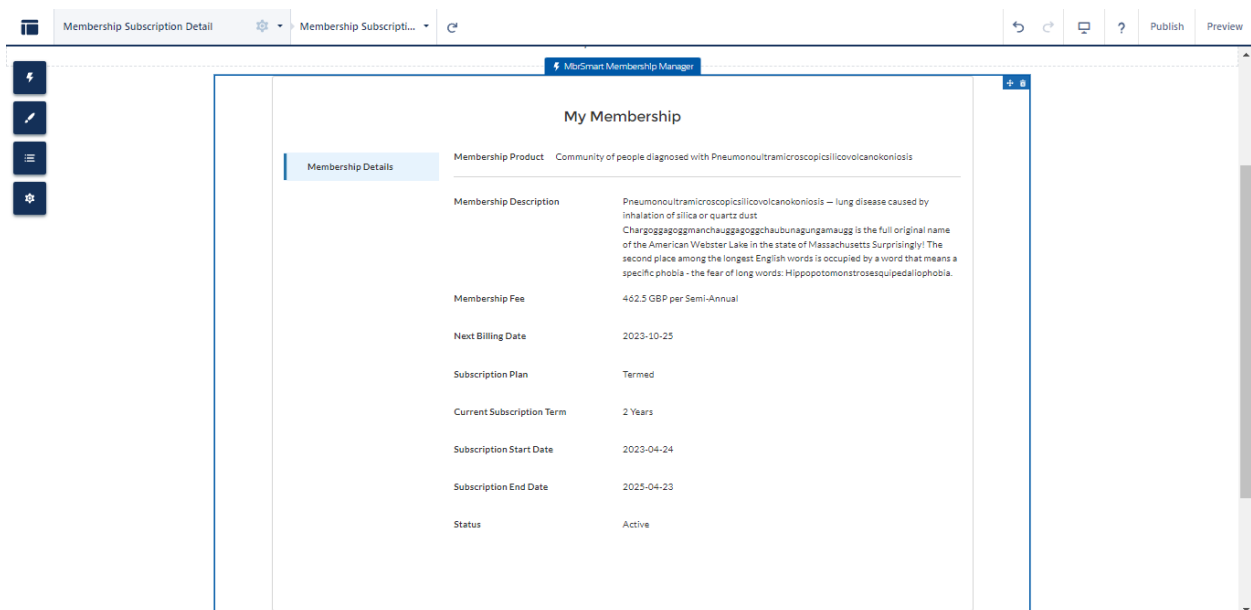
Note When you delete a payment method from Salesforce environment, it is deleted in Stripe as well.

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 component, 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.



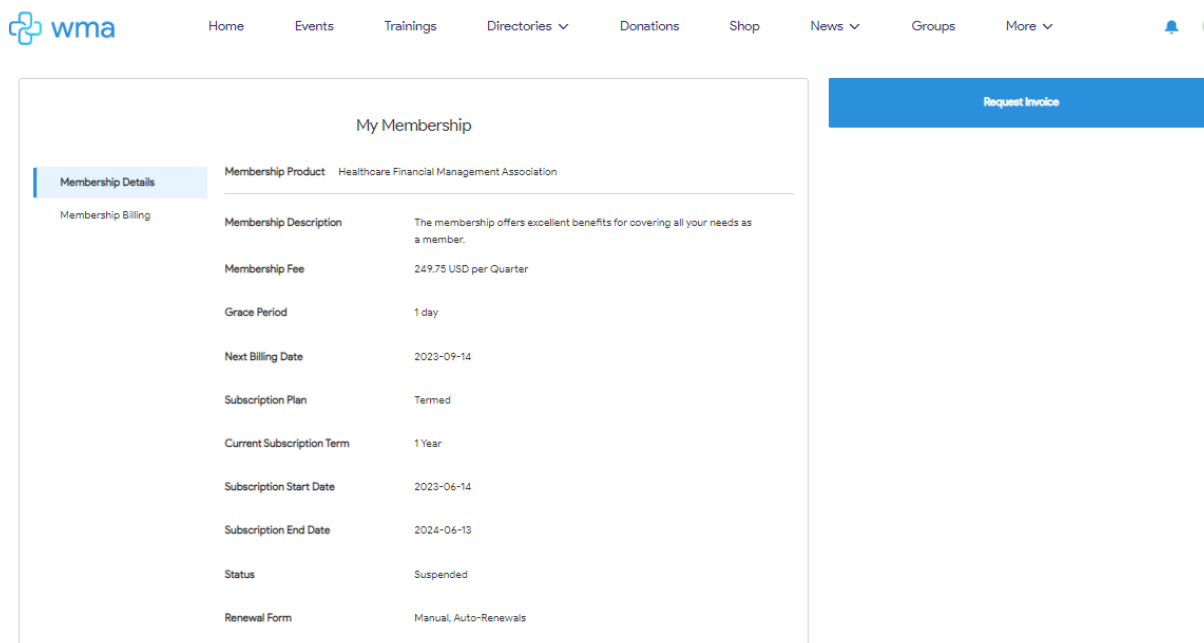
Membership Manager Component

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, we recommend

utilizing the [Membership Details](#) component. This component, when combined with others, offers an efficient solution.

Membership Details



My Membership	
Membership Product Healthcare Financial Management Association	
Membership Description	The membership offers excellent benefits for covering all your needs as a member.
Membership Fee	249.75 USD per Quarter
Grace Period	1 day
Next Billing Date	2023-09-14
Subscription Plan	Termed
Current Subscription Term	1 Year
Subscription Start Date	2023-06-14
Subscription End Date	2024-06-13
Status	Suspended
Renewal Form	Manual, Auto-Renewals

In the Membership Details section, 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 grace period
For how many days a user can use the membership benefits without providing a payment
- 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 plan
The value selected by a user when registering as a member

- Current subscription term
The value selected by a user when registering as a member
- Subscription start date
Date when the subscription starts
- Subscription end date
Date when a subscription ends
- Status of the membership subscription
- Renewal form
The value selected by a user when registering as a member (automatic or manual)
- Renew, Cancel, Finalize Payment 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.
 - 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.
 - Finalize Payment button is displayed if:
 - if the '*Finalize Payment Flow API Name*' property is filled.
 - if the subscription has the following status: '*Pending*'.

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.

The screenshot displays the WMA Membership Manager interface. At the top, there is a navigation bar with the WMA logo and links for Home, Events, Trainings, Directories, Donations, Shop, News, Groups, and More. A user profile icon is visible on the right. Below the navigation bar, the main content area is titled "My Membership". On the left, there is a sidebar with "Membership Details" and "Membership Billing" (the latter is highlighted). The main content area shows the "Membership Product" as "Healthcare Financial Management Association". Below this, the user's name "Karl Johnsonn" is displayed. The "Contact Info" section includes fields for First Name (Karl), Last Name (Johnsonn), Email (karljohnson@gmail.com), Account Name (European Academy of Pediatrics), Description, Languages, Phone (+44 7975 777666), and Mobile (+44 7975 777666). The "Billing Address" section includes fields for Account Name (European Academy of Pediatrics), Phone (+44 7911 123456), and Billing Address (9178 Chester Road, London, E63 0PD, United Kingdom). A blue button labeled "Request Invoice" is located in the top right corner of the main content area.

The component has the following properties:

MbrSmart Membersh...



* Subscription Id

{!recordId}

* Contact Field Set Name

MbrSmart__Member_Default_Fieldset

* Account Field Set Name

MbrSmart__Member_Default_Fieldset

Renew Subscription Flow API Name

MbrSmart__Subscription_Renew

Cancel Subscription Flow API Name

MbrSmart__Subscription_Renew

Finalize Payment Flow API Name

MbrSmart__Subscription_Renew

☐ Hide the "Membership Billing" section

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

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 (not provided by AC, please create the payment flow according to your organisation's needs)

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

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](#) and [payment methods](#), 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

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.

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 grace period
For how many days a user can use the membership benefits without providing a payment
- 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 plan
The value selected by a user when registering as a member
- Current subscription term
The value selected by a user when registering as a member
- Subscription start date
Date when the subscription starts
- Subscription end date
Date when a subscription ends
- Status of the membership subscription
- Renewal form
The value selected by a user when registering as a member (automatic or manual)
- Renew, Cancel, Finalize Payment 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.
- 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.
- Finalize Payment button is displayed if:
 - if the '*Finalize Payment Flow API Name*' property is filled.
 - if the subscription has the following status: '*Pending*'.

The component has the following properties:

MbrSmart Membersh...



* Subscription Id

{!recordId}

Renew Subscription Flow API Name

MbrSmart__Subscription_Renew

Cancel Subscription Flow API Name

MbrSmart__Subscription_Renew

Finalize Payment Flow API Name

MbrSmart__Subscription_Renew

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 – dd
the flow API name (not provided by AC,
please create the payment flow
according to your organisation's needs)

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

As an admin, you have the flexibility to choose whether to display the component within the Membership Manager or use it separately.

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.

<https://advancedcommunities.com>

sales@advancedcommunities.com