

1. Payment Plan Option

Menu link:

Administer > Civ/Contribute > Payment plan options

Payment plan options

Name	Type	Details	Actions
12 monthly instalments rolling	Rolling	12 instalments every 1 months	▼
12 monthly instalments fixed	Fixed	12 instalments every 1 months on 7th of month	▼
			<div style="border: 1px solid black; padding: 2px;"> Edit Delete Disable </div>

New option:

Fixed Mode:
No instalment will be taken until the fixed due day. All instalments will be taken on the fixed day in each of the period (week/month/year).

Rolling Mode:
First instalment will be taken right away when payment plan is confirmed. Following instalments will be taken on the same day in each of the period (week/month/year).

New Payment Plan Option

Save Save and New Cancel

Payment Plan Option Name* 12 month instalments

Contribution creation mode* Fixed Rolling

To be created in* 12 instalments every 1 month(s)

Contributions will be created on* 1 day of the period

This applies to weekly, monthly and yearly payments.

Enabled?

Only show in fixed mode

Save Save and New Cancel

'Payment Plan Option' is used for defining a reusable sets of line items with preconfigured instalment and reminder settings.

TBD: If choose to use recurring payment, the reminder will notify the customer that a payment is going to be taken every occurrence.

Due date of rolling depends on the payment plan confirmation date. Hence this field will be hidden in Rolling mode.

New Payment Plan Option

Save Save and New Cancel

Payment Plan Option Name* 12 month instalments

Contribution creation mode* Fixed Rolling

To be created in* 12 instalments every 1 month(s)

Enabled?

Save Save and New Cancel

2. Contribution Page Configuration

TODO: Webform

Configure Page – Member Signup and Renewal

Contribution Links

Title Amounts Memberships Receipt Tell a Friend Profiles Premiums Widgets Personal Campaigns

Use this form to configure Contribution Amount options. You can give contributors the ability to enter their own contribution amounts - and/or provide a fixed list of amounts. For fixed amounts, you can enter a label for each "level" of contribution (e.g. Friend, Sustainer, etc.). If you allow people to enter their own dollar amounts, you can also set minimum and maximum values. Depending on your choice of Payment Processor, you may be able to offer a recurring contribution option. [Learn more...](#)

Save Save and Done Save and Next Cancel

EXECUTE REAL-TIME MONETARY TRANSACTIONS Uncheck this box if you are using this contribution page for free membership signup ONLY, or to solicit in-kind / non-monetary donations such as furniture, equipment, etc.

CURRENCY * One off is the default payment option currently CivCRM provides on page.

PAY OPTIONS FIELD LABEL *

PAY OPTIONS *

Payment Option	Payment Processors	Discount?
<input checked="" type="checkbox"/> One Off <input type="text" value="Full Payment"/>	<input checked="" type="checkbox"/> SagePay <input type="checkbox"/> Paypal <input checked="" type="checkbox"/> Pay later payment processor 1	<input type="radio"/> None <input type="radio"/> Amount <input type="radio"/> Percentage
<input checked="" type="checkbox"/> 12 monthly instalments (Direct Debit)	<input checked="" type="checkbox"/> Sign up Direct Debit	<input type="radio"/> None <input type="radio"/> Amount <input checked="" type="radio"/> Percentage <input type="text" value="3"/> %
<input type="checkbox"/> 12 monthly instalments (Credit Card)	<input type="checkbox"/> SagePay <input type="checkbox"/> Paypal	<input type="radio"/> None <input type="radio"/> Amount <input type="radio"/> Percentage
<input type="checkbox"/> 4 quarterly instalments (Direct Debit)	<input checked="" type="checkbox"/> sign up Direct Debit	<input type="radio"/> None <input type="radio"/> Amount <input type="radio"/> Percentage

PAY LATER OPTION Check this box if you want to give users the option to submit payments via a credit card, call in a credit card, etc.

CONTRIBUTION AMOUNTS SECTION ENABLED Uncheck this box if you are using this contribution page for membership signup and renewal only - and you do NOT want users to select or enter any additional contribution amounts.

Save Save and Done Save and Next Cancel

TODO for future phase:
 Renewal of membership available memberships
 -> What membership types to offer based on current membership?
 Renewal membership start dates
 -> When I change to another type, what is the start date?
 End of current membership or immediate
 Discount for previous amounts paid of previous amount
 -> Deduct amounts paid option
 Discount for upgrade
 -> Coupon codes for now but future requirement

Pay Later will be made to be a payment processor type so it is replicable

Membership Signup and Renewal

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam ut neque dui. Praesent quis turpis augue. Quisque sagittis rhoncus urna, quis interdum dolor pretium vitae. Etiam sapien magna, facilisis ac lorem eget, pellentesque aliquam diam. Sed sed ex congue, mollis justo o, aliquet dui. Quisque hendrerit egestas arcu sed scelerisque.

Membership Levels

- Standard membership - £960
- Concession membership - £700

Payment and Installment

- Full Payment
- 12 monthly instalments (Direct Debit)
- 12 monthly instalments (Credit Card)
- 4 quarterly instalments (Direct Debit)

How would you like to pay?

- Sign up Direct Debit

Direct Debit Mandate Information

Bank Name

Bank Street Address

City

Country

Postcode

Account Holder Name*

Account Number*

Sort Code*

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit the organisation will notify you (normally 10 working days) in advance of your account being debited or as otherwise agreed. If you request the organisation to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by the organisation or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when the organisation asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Membership Signup and Renewal

Please verify the information below carefully. Click Go Back if you need to make changes. To complete your order, click the Confirm button below

Membership Levels

Standard membership - £960

Payment and Installment

12 monthly instalments (Direct Debit)

How would you like to pay?

Sign up Direct Debit

Direct Debit Mandate Information

Bank Name

Bank Street Address

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- If an error is made in the payment of your Direct Debit, by the organisation or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when the organisation asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Checkout information

Please confirm the information below before continue:

Line Item	No.	Amount
Standard Membership	1	£960
Total		£960

A total of £960 are to be paid in 12 instalments on every 6th day of the month.

First instalment summary

Invoice Date 20/04/2017

Due Date 20/10/2017

Total Amount £80

Membership Signup and Renewal

Thanks for supporting our organization with your membership. You can learn more about membership benefits from our members only page.

Keep this receipt for your records

Please print this confirmation for your records

Membership Information	
Membership Type	Standard membership
Term	1
Total Amount	£960

The following are your Direct Debit details. Please note that your first subscription will be collected on, or shortly after, 20/04/2017 and then monthly on this date.

Direct Debit Mandate Information	
Account Holder Name	Jed Adams Jr.
Sort Code	20-20-20

Please check that your Direct Debit details above are correct. If they are not, please contact the Membership Department on membership@example.org or call 020 0000 0901. If your Direct Debit details are correct, you need do nothing and your Direct Debit will be collected as stated above.

3 Contact Page Contributions Tab

Contributions

Jed Adams Jr.

Summary | Tabs | Documents | **Contributions** | Ranges | Memberships | Events | Activities 153 | Cases 0 | Relationships 4 | Groups 3 | Notes 0 | Tags 1 | Change Log 0

Contributions | Payment Plans

Outstanding Contributions

Total Amount	Paid	Due	Line Items	Invoice Date	Due Date	Source	Invoice Status	Payment Status
€300	€50	€50	Standard Membership 1 year (25%)	01/01/2017	01/01/2017	Membership Signup	Approved	Unpaid (Due €300)
€300	€400	€0	2017 workshop (50%)	01/07/2017	31/07/2017	Membership Signup	Approved	Partially Paid (Overbook)
€300	€400	€0	2017 workshop (50%)	01/07/2017	31/07/2017	Workshop Register	Cancelled	Credit Note
€300	€200	€50	Standard Membership 1 year (25%)	01/04/2017	01/05/2017	Workshop Register	Cancelled	N/A

Complete Contributions

Total Amount	Paid	Due	Line Items	Invoice Date	Due Date	Source	Invoice Status	Payment Status
€300	€250	€50	Standard Membership 1 year (25%)	01/01/2017	01/01/2017	Membership Signup	Approved	Paid
€300	€300	€0	Credit Card	01/01/2017		Loren Ipsum Lorem Ipsum Lorem Ipsum	Refunded	
€300	€300	€0	Credit Card	01/01/2017		Loren Ipsum Lorem Ipsum Lorem Ipsum	Completed	

New Contribution

Contact: Jed Adams Jr.

Contribution Information

Financial Type: Donation

Amount: GBP £100

Source: Nearly Donation

Campaign: 2017 Fundraising

Invoice Date: 01/01/2017

Due Date: 01/01/2017

Invoice Status: Approved

Notes: *If approved, allow payment*

Add Payment?

Payment Amount: €50

Payment Method: Check

Check Number: [Field]

Transaction ID: [Field]

Receipt Date: 01/01/2017

Personal Campaign Page:

Donor Information:

Custom Receipt:

Email Notification:

Attach Invoice?

From: [Field]

Message: [Field]

View Contribution

Contact: Jed Adams Jr.

Financial Type: Donation

Amount: €80

Source: Nearly Donation

Campaign: 2017 Fundraising

Invoice Date: 01/01/2017

Due Date: 01/01/2017

Invoice Status: Approved

Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Personal Campaign Page

Donor Information

Custom Receipt

Payment Status: Paid

Amount	Payment Method	Received Date	Notes	Status
€300	Credit Card	01/01/2017	Loren Ipsum Lorem Ipsum Lorem Ipsum	Refunded
€300	Credit Card	01/01/2017	Loren Ipsum Lorem Ipsum Lorem Ipsum	Complete

New Payment

Contact: ragnergear@veargfx.com

Payment Amount: USD \$100.00

Balance Owed: \$100.00

Send Receipt? Automatically email a receipt to ragnergear@veargfx.com?

Payments Details

Date Received: 23/09/2017 05:34PM

Payment Method: -select-

Transaction ID: [Field]

Fee Amount: [Field]

Net Amount: [Field]

Net value of the payment (Total Amount minus fees).

Payment Plans

Jed Adams Jr.

Summary | Tabs | Documents | **Contributions** | Ranges | Memberships | Events | Activities 153 | Cases 0 | Relationships 4 | Groups 3 | Notes 0 | Tags 1 | Change Log 0

Contributions | Payment Plans

Ongoing Payment Plans

Total Amount	Paid	Due	Balance	Line Items	Start Date	End Date	Source	Status
€3000	€500	€300	€300	Standard Membership 1 year	01/01/2017	31/01/2018	Loren Ipsum Lorem Ipsum	In Progress
€300	€400	€500	€600	2017 workshop	01/01/2017	31/01/2017	Loren Ipsum Lorem Ipsum	In Progress (Overbook)
€300	N/A	N/A	N/A	2017 workshop	01/01/2017	31/01/2017	Loren Ipsum Lorem Ipsum	Overbook

Complete Payment Plans

Total Amount	Paid	Due	Balance	Line Items	Start Date	End Date	Source	Status
€3000	€1000	€500	€0	2016 workshop	01/01/2016	31/12/2016	Loren Ipsum Lorem Ipsum	Complete

New Payment Plan

Contact: Jed Adams Jr.

Payment Plan Information

Financial Type: Donation

Amount: GBP £100

Source: Nearly Donation

Campaign: 2017 Fundraising

Payment Plan Option: 12 Month Installments (Billing)

Payment Method: Check

Payment Plan Start Date: 01/01/2017

Payment Plan Status: Approved

Notes: **First installment summary**

Total Amount	Paid	Due	Balance	Line Items	Start Date	End Date	Source	Status
€300	€250	€50	€0	2016 workshop (50%)	01/01/2016	31/01/2016	Loren Ipsum Lorem Ipsum	Approved
€300	€250	€50	€0	2016 workshop (50%)	01/07/2016	31/07/2016	Loren Ipsum Lorem Ipsum	Approved

Add Payment?

Payment Amount: €50

Payment Method: Check

Check Number: [Field]

Transaction ID: [Field]

Receipt Date: 01/01/2017

Email Notification:

Attach Invoice?

From: [Field]

Message: [Field]

View Payment Plan

Contact: Jed Adams Jr.

Financial Type: Donation

Amount: €1000

Source: Nearly Donation

Campaign: 2017 Fundraising

Payment Plan Option: 2 half year Installments (Billing)

Payment Method: Check

Payment Plan Start Date: 01/01/2017

Payment Plan End Date: 30/01/2018

Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Total Amount	Paid	Due	Balance	Line Items	Start Date	End Date	Source	Status
€1000	€1000	€0	€0	2016 workshop	01/01/2016	31/12/2016	Loren Ipsum Lorem Ipsum	Complete

Total Amount	Paid	Due	Balance	Line Items	Invoice Date	Due Date	Source	Invoice Status	Payment Status
€500	€500	€0	€0	2016 workshop (50%)	01/01/2016	31/01/2016	Loren Ipsum Lorem Ipsum	Approved	Paid
€500	€500	€0	€0	2016 workshop (50%)	01/07/2016	31/07/2016	Loren Ipsum Lorem Ipsum	Approved	Paid

4. Membership Screens

Jed Adams Jr.

Summary | Tasks | Documents | Contributions | Ranges | Memberships | Events | Activities | Cases | Relationships | Groups | Notes | Tags | Change Log

Member Since: 01/01/2013 [New Membership Term](#)

Year: 0 Month

Membership	2014	2016	2016	2017	2018
Standard Membership			Term 2	Standard Membership	
Term 1				Term 2	
Term 2				Term 3	
Term 3				Term 3	
Silver Membership				Silver Membership	
Concession Membership					
Bronze Membership					

List Terms: Group by membership

Active Memberships

Membership	Start Date	End Date	Status	Source	Auto-renew	Related	
Standard Membership	01/01/2016	31/12/2018	Current	Membership Signup	✓	0 Created	View Edit
Term 1	01/01/2016	31/12/2016	Expired				View Edit
Term 2	01/01/2016	31/12/2017	Expired				View Edit
Term 3	01/01/2017	31/12/2018	Expired				View Edit
Silver Membership	01/01/2017	31/12/2018	Current	Membership Signup	✓	0 Created	View Edit

Inactive Memberships

Membership	Start Date	End Date	Status	Source	Auto-Renew	Related	
Concession Membership	01/01/2013	31/12/2015	Expired	Membership Signup	Enable	0 Created	View Edit
Bronze Membership	01/01/2013	31/12/2015	Expired	Membership Signup	Enable	0 Created	View Edit

View Membership

Contact: Jed Adams Jr.

Membership: Standard Membership

Source: Membership Signup

Campaign: 2017 Fundraising

Start Date: 01/01/2016

End Date: 31/12/2018

Auto-renew: 10/09/2018

Related Membership: 0 Created

Membership Terms

Term	Start Date	End Date	Status
1	01/01/2016	31/12/2016	Expired
2	01/01/2016	31/12/2017	Expired
3	01/01/2017	31/12/2018	Current

Contributions and Payment Plans

Total Amount	Paid	Due	Balance	Lines Items	Start Date	End Date	Source	Status
£160	£160	£160	£0	Standard Membership	01/01/2016	31/12/2016	Loren Ipsum Lorem Ipsum	Complete
£160	£160	£160	£0	Standard Membership	01/01/2016	31/12/2017	Loren Ipsum Lorem Ipsum	Complete
£160	£80	£80	£80	Standard Membership	01/01/2017	31/12/2018	Loren Ipsum Lorem Ipsum	In Progress

View Membership Term

Membership Information

Contact: Jed Adams Jr.

Membership: Standard Membership [View Membership](#)

Term Information

Start Date: 01/01/2016

End Date: 31/12/2016

Contribution and Payment Plan

Total Amount	Paid	Due	Balance	Lines Items	Start Date	End Date	Source	Status
£160	£160	£160	£0	Standard Membership	01/01/2016	31/12/2016	Loren Ipsum Lorem Ipsum	Complete

View Payment Plan

Contact: Jed Adams Jr.

Financial Type: Donation

Amount: £160

Source: Yearly Donation

Campaign: 2017 Fundraising

Payment Plan Option: 12 Month Installments (Rolling)

Payment Method: Direct Debit [View Mandate](#)

Payment Plan Start Date: 30/09/2017

Payment Plan End Date: 10/09/2018

Notes: Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Total Amount	Paid	Due	Balance	Lines Items	Start Date	End Date	Source	Status
£1500	£300	£200	£0	2016 workshop	01/01/2016	31/12/2016	Loren Ipsum Lorem Ipsum	Approved
£500	£500	£0	£0	2016 workshop (50%)	01/01/2016	31/01/2016	Loren Ipsum Lorem Ipsum	Approved
£500	£500	£0	£0	2016 workshop (50%)	01/01/2016	31/01/2016	Loren Ipsum Lorem Ipsum	Approved

Jed Adams Jr.

Summary | Tasks | Documents | Contributions | Ranges | Memberships | Events | Activities | Cases | Relationships | Groups | Notes | Tags | Change Log

Member Since: 01/01/2013 [New Membership Term](#)

Year: 0 Month

Membership	2014	2016	2016	2017	2018
Standard Membership			Term 2	Standard Membership	
Term 1				Term 2	
Term 2				Term 3	
Term 3				Term 3	
Silver Membership				Silver Membership	
Concession Membership					
Bronze Membership					

List Terms: Group by membership

Membership Terms

Start Date	End Date	Membership Type	Status	
01/01/2017	31/12/2018	Standard Membership	Current	View Edit
01/01/2017	31/12/2018	Silver Membership	Current	View Edit
01/01/2016	31/12/2017	Standard Membership	Expired	View Edit
01/01/2016	31/12/2016	Standard Membership	Expired	View Edit
01/01/2014	31/12/2015	Concession Membership	Expired	View Edit
01/01/2014	31/12/2015	Bronze Membership	Expired	View Edit
01/01/2013	31/12/2014	Concession Membership	Expired	View Edit
01/01/2013	31/12/2014	Bronze Membership	Expired	View Edit

Invoices

New Membership Term

Contact: Jed Adams Jr.

Membership: Standard Membership

Source: Membership Signup

Start Date: 20/09/2017

End Date: 10/09/2018

Contribution and Payment Plan: One-off Payment Plan

Pay by: Different Contact? Same

Amount: £80

Invoice Date: 20/09/2017

Due Date: 20/09/2017

Invoice Status: Approved [If approved, allow payment](#)

Notes:

Add Payment?

Payment Amount: £80

Payment Method: Check

Check Number:

Transaction ID:

Receipt Date: 20/09/2017

Email Notification:

Attach Invoice?

From: system@memorg.com

Message:

View Mandate

Bank Name: Barclays Bank PLC

Bank Street Address: 1 Churchill Place

City: London

Country: United Kingdom

Postcode: E14 5HP

Account Holder Name: Jed Adams Jr.

Account Number: 33333333

Sort Code: 20-20-20

Direct Debit Code: 0N

Amount: £80

DD Ref: cv000001

Start Date: 20/09/2017

Authorization Date: 20/09/2017

Authorization File: [Upload](#)

Suspend Date: 2/7

Reason for Suspension: Collection Day

Collection Day: 3rd of the month

Payment Plans

New Membership Term

Contact: Jed Adams Jr.

Membership: Standard Membership

Source: Membership Signup

Start Date: 20/09/2017

End Date: 10/09/2018

Contribution and Payment Plan: One-off Payment Plan

Pay by: Different Contact? Same

Amount: £160

Payment Plan Option: 12 Month Installments (Direct Debit)

Payment Method: Direct Debit [Direct Debit requires mandate](#)

Payment Plan Start Date: 20/09/2017

Payment Plan Status: Approved

Notes:

First instalment summary

Invoice Date: 20/09/2017

Due Date: 20/09/2017

Total Amount: £80

Direct Debit Mandate

Bank Name:

Bank Street Address:

City:

Country:

Postcode:

Account Holder Name:

Account Number:

Sort Code:

Direct Debit Code:

Amount: £80

DD Ref: cv000001

Start Date: 20/09/2017

Authorization Date: 20/09/2017

Authorization File: [Upload](#)

Suspend Date: 2/7

Reason for Suspension: Collection Day

Collection Day: 3rd of the month

Email Notification:

Attach Invoice?

From: system@memorg.com

Message:

Payment Plans

New Membership Term

Contact: Jed Adams Jr.

Membership: Standard Membership

Source: Membership Signup

Start Date: 20/09/2017

End Date: 10/09/2018

Contribution and Payment Plan: One-off Payment Plan

Pay by: Different Contact? Same

Amount: £160

Payment Plan Option: 12 Month Installments (Direct Debit)

Payment Method: Direct Debit [Direct Debit requires mandate](#)

Payment Plan Start Date: 20/09/2017

Payment Plan Status: Approved

Notes:

First instalment summary

Invoice Date: 20/09/2017

Due Date: 20/09/2017

Total Amount: £80

Email Notification:

Attach Invoice?

From: system@memorg.com

Message:

New option for status rule, to set the status to grace or overdue when invoice is missed.

▼ **Membership Status Rules**
🖨️ ↻ ✕

New Membership Status

Label *
Display name for this Membership status (e.g. New, Current, Grace, Expired...).

Start Event * ⓘ
When does this status begin? EXAMPLE: New status begins at the membership 'join date'.

Start Event Adjustment ⌵
Optional adjustment period added or subtracted from the Start Event. EXAMPLE: Current status might begin at 'join date' PLUS 3 months (to distinguish Current from New members).

End Event ⓘ
When does this status end? EXAMPLE: Current status ends at the membership 'end date'.

End Event Adjustment ⌵
Optional adjustment period added or subtracted from the End Event. EXAMPLE: Grace status might end at 'end date' PLUS 1 month.

Current Membership?
Should this status be considered a current membership in good standing. EXAMPLE: New, Current and Grace could all be considered 'current'.

Administrator Only?
Check this box if this status is for use by administrative staff only. If checked, this status is never automatically assigned by CivMember. It is assigned to a contact's Membership by checking the Status Override flag when adding or editing the Membership record. Start and End Event settings are ignored for Administrator statuses. EXAMPLE: This setting can be useful for special case statuses like 'Non-expiring', 'Barred' or 'Expelled', etc.

Order
Weight sets the order of precedence for automatic assignment of status to a membership. It also sets the order for status displays. EXAMPLE: The default 'New' and 'Current' statuses have overlapping ranges. Memberships that meet both status range criteria are ordered by the status with the lowest value.

Membership in arrears will mean:

> Where the total payments received against all contributions linked to the membership is less than the amount due, taking into account only invoices whose due date (not invoice date) has passed.

This status will no longer apply once:

> The total payments received against all contributions linked to the membership is = or greater than the amount due, taking into account only invoices whose due date (not invoice date) has passed.

Optionally we can have another rule for where we are simply awaiting payment, but not overdue.

▼ **Membership Status Rules**
🖨️ ↻ ✕

New Membership Status

Label *
Display name for this Membership status (e.g. New, Current, Grace, Expired...).

Start Event * ⌵
When does this status begin? EXAMPLE: New status begins at the membership 'join date'.

Start Event Adjustment ⌵
Optional adjustment period added or subtracted from the Start Event. EXAMPLE: Current status might begin at 'join date' PLUS 3 months (to distinguish Current from New members).

End Event ⌵
When does this status end? EXAMPLE: Current status ends at the membership 'end date'.

End Event Adjustment ⌵
Optional adjustment period added or subtracted from the End Event. EXAMPLE: Grace status might end at 'end date' PLUS 1 month.

Current Membership?
Should this status be considered a current membership in good standing. EXAMPLE: New, Current and Grace could all be considered 'current'.

Administrator Only?
Check this box if this status is for use by administrative staff only. If checked, this status is never automatically assigned by CivMember. It is assigned to a contact's Membership by checking the Status Override flag when adding or editing the Membership record. Start and End Event settings are ignored for Administrator statuses. EXAMPLE: This setting can be useful for special case statuses like 'Non-expiring', 'Barred' or 'Expelled', etc.

Order
Weight sets the order of precedence for automatic assignment of status to a membership. It also sets the order for status displays. EXAMPLE: The default 'New' and 'Current' statuses have overlapping ranges. Memberships that meet both status range criteria are ordered by the status with the lowest value.

To discuss whether this is even needed.

Awaiting any payment:

> Where the total payments received against all contributions linked to the membership is less than the amount due, taking into account contributions whose invoice date has passed.

This status will no longer apply once:

> The total payments received against all contributions linked to the membership is = to or greater than the amount due, taking into account only invoices whose invoice date has passed.

3. Contact Page Contributions Tab

Contributions

Jed Adams Jr.

Actions View Filter Contact

Summary Tasks Documents Campaigns Pages 1 Memberships 0 Events 0 Activities 133 Cases 0 Relationships 4 Groups 0 Notes 3 Tags 1 Change Log 0

Sub-administrators 0

Contributions Payment Plans

New Contribution

Outstanding Contributions

Total Amount	Paid	Due	Line Items	Invoice Date	Due Date	Source	Status	Payment Status
E300	E250	E50	Standard Membership 1 year (25%)	01/10/2017	01/10/2017	Membership Signup	Approved	Unpaid (Due E250)
E500	E400	E100	2017 workshops (50%)	01/01/2017	31/07/2017	Membership Signup	Approved	Partially Paid (Overdue) (Due E100)
E500	E400	E100	2017 workshops (50%)	01/01/2017	31/07/2017	Workshop Register	Cancelled	Credit Note
E300	E250	E50	Standard Membership 1 year (25%)	01/04/2017	01/04/2017	Workshop Register	Cancelled	N/A

Complete Contributions

Total Amount	Paid	Due	Line Items	Invoice Date	Due Date	Source	Status	Payment Status
E300	E250	E50	Standard Membership 1 year (25%)	01/10/2017	01/10/2017	Membership Signup	Approved	Paid
E300								
E300								
E300								

New Contribution

Contact Jed Adams Jr.

Contribution Information

Financial Type: Donation

Amount: GBP £0

Source: [Dropdown]

Campaign: [Dropdown]

Creation Date: 22/09/2017

Payment Due Date: 22/09/2017

Status: Approved

Notes: If returned, please inform [Dropdown]

Add Payment

Payment Amount: E90

Payment Method: Credit Card

Check Number: [Input]

Transaction ID: [Input]

Payment Date: 22/09/2017

Personal Campaign Page

Donor Information

Custom Fields

Email Notification

Attach Invoice?

From: system@reemrg.com

Message: [Input]

Cancel Save and New Save

View Contribution

Contact Jed Adams Jr.

Financial Type: Donation

Amount: E90

Source: Yearly Donation

Campaign: 2017 Fundraising

Creation Date: 22/09/2017

Due Date: 22/09/2017

Status: Approved

Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Personal Campaign Page

Donor Information

Custom Fields

Payment Status: Paid

Amount	Payment Method	Received Date	Notes	Status
E300	Credit Card	01/01/2017	Lorem ipsum Lorem ipsum Lorem ipsum	Refunded
E300	Credit Card	02/01/2017	Lorem ipsum Lorem ipsum Lorem ipsum	Complete

Cancel Save and New Save

New Payment

Contact: ragporgear@veargfw.com + Submit Credit Card Payment

Payment Amount: USD \$0

Balance Owed: \$ 150.00

Send Receipt? Automatically email a receipt to ragporgear@veargfw.com?

Payment Details

Date Received: 28/09/2017 09:34PM

Payment Method: [Dropdown]

Transaction ID: [Input]

Fee Amount: [Input]

Net Amount: [Input]

Net value of the payment (Total Amount minus Fee).

Cancel Record Payment

Credit Note Assign It