

# Using Membership Best Practices

This topic outlines a number of membership best practices introduced in Aptify 5.5.1. These improvements focus largely on renewal, which is one of the most important practices to leverage through automated technology. The updates in version 5.5.1 described here improve the ease for a member to maintain continuity with their membership organization.

Updates with version 5.5.1 include

- The introduction of a scheduled task to automatically generate quotation orders for all memberships within a 90 day expiration.
- Automatic generation of email notification for expiring and unpaid memberships.
- A complete auto-renewal workflow that creates an order and payment on the membership anniversary date.
- Cancellation for memberships that expired 120 days prior.

The best practices for these updates are described in the following subsections:

- [Recommendations for Membership Renewal Workflow](#)
- [Activating the Membership Renewal Workflows](#)



Additional membership management best practices can be found in [Best Practices for Membership Dues](#).

## Generating Renewal Quotation Orders

In 5.5.1, Aptify provides improved productivity via an automated monthly process that generates quotations orders for all subscriptions with an expiration month/year, three months from "Today" (the day the process runs). Aptify 5.5.1 includes a pre-built view pulling in the appropriate subscription records that will then be passed to the Aptify Subscription Renewal Wizard thus generating the quotation orders.



### Note

This will be set up to run daily for organizations that have rolling membership start dates and once a year for those organization where the subscriptions all expire on the same day.

## Automated Email Renewal Notices Sent Monthly

In version 5.5.1, an automated process creates renewal notices using an e-mail template and sends them to the appropriate members whose memberships are expiring and who have not yet paid.

The message varies depending on how much time has expired from the original notice date. Notifications include a 90 day in advance message, a 60 day in advance message, a 30 day in advance message, a 0 day in advance message, a 30 day past due message, a 60 day past due message and a final 90 days past due message. The view automatically filters people out as soon as they renew.

## Membership Auto-Renewal

Beginning with version 5.5.1, Aptify formalizes the membership auto-renewal process using the Standing Orders service to automatically create an order and payment on the membership anniversary date by running the Standing Order Fulfillment object.

## Expire Memberships for Non-Payment

Version 5.5.1 includes a new workflow that expires memberships that expired 120 days ago, cancels the open quotation order, and includes an option to change the Member Type of the subscription recipient's record.