How to record offline payments

Members may elect to make offline membership contributions by cash, cheque, or direct bank transfer. These contributions can be recorded in Membershipworks so that you can see an accurate picture of your choir's finances.

1. Log into your portal here using your credentials:
membershipworks/admin
The first step is to navigate to the member's timeline.

2. Click on 'Folders' in the sidebar, then click on the folder with the name of your choir.
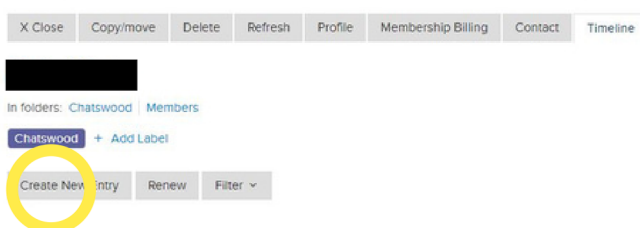

3. This will pull up a list of all the members in your choir, listed in alphabetical order by first name. You can use the search bar at the top to search for specific members.
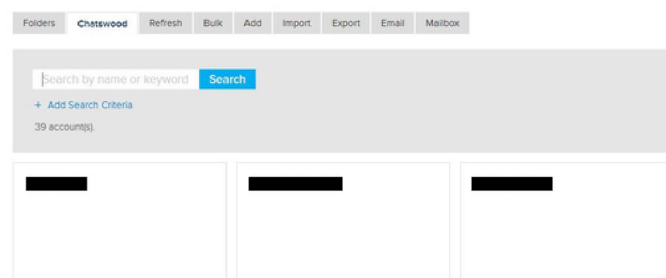
4. Clicking on the member's name will pull up their membership timeline.

Click on 'Create New Entry'.

Type: select 'Renewal'

Date: click to select the date that the contribution was received

Action: select 'Record payment received' to record an offline contribution. If the member wishes to make a one-off contribution by credit card, you can select 'Charge amount to a credit card'.

Type	Renewal			
Date	Jun 27 2023			
Action	Record payment received			
Calculate Renewal Using	Offline contributions - cash, cheque,			
New Membership Expiration Date	Jul 27 2023			
Line Item		Category	Qty	Each	Tax
Chatswood Jun 27, 2023 - Jul 27, 2023		Cart	1	45	Override
+ Add Line Item					

Gross amount 45
Tax 0
Fees
Credit card txn ID
Tags
Admin notes Enter your notes here

○ Send payment receipt email

Save   Close

Calculate Renewal Using: if the member has selected $10, $25, or $45, choose the appropriate membership level. If they have chosen a different amount, select 'Offline contributions'.

New Membership Expiration Date: click to select the new membership expiration date for this member. For example, if the member has contributed $500, their new expiration date will be a year from when the contribution was received.

Line Items: if the member has chosen a custom amount, change the amount listed in the 'Each' column. Make sure the dates under the name of the choir are correct.

Send payment receipt email: click the circle to email a contribution receipt to the member.

If you selected 'Charge amount to a credit card', you will be prompted to enter the card details here.

Click 'Save' to confirm.

This will record the contribution and update the member's expiration date.