

# MyBernard New Release

## July 28, 2016

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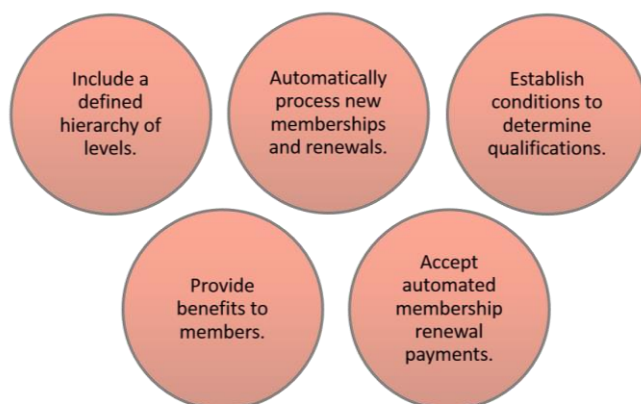
### Overview

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The July, 2016 release of **MyBernard** includes the new Membership module and enhancements to **MyBernard** Mobile as well as the Partners and Major Donors modules.

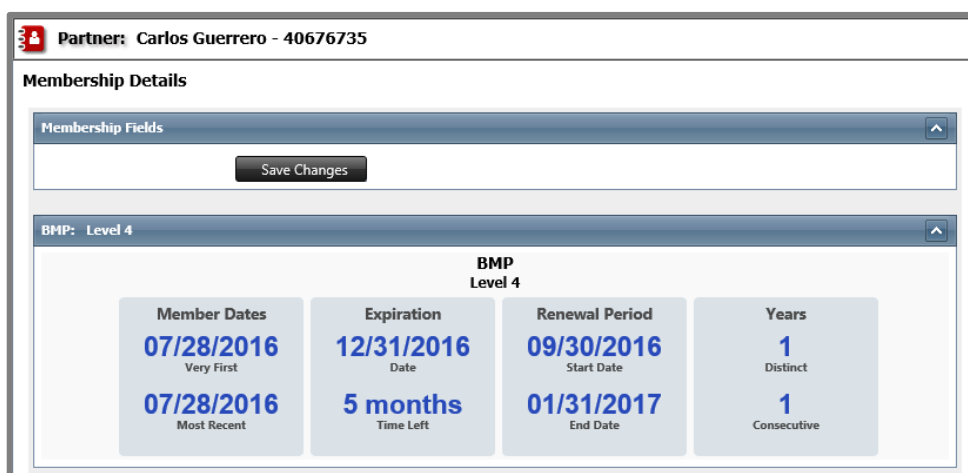
### Membership

The new Membership module in **MyBernard** gives you the ability to manage all aspects of your membership programs. You can define your levels, establish requirements for achieving each level, and provide different benefits to members who meet the requirements.



You can also determine processes to automatically renew memberships and accept renewal payments made by debit or credit card. You must process these payment methods through **MyBernard** to utilize this functionality.

You can view membership details on the partner and major donor records. On the partner record, click the **Membership Details** link in the **Actions** pane.




The screenshot shows the 'Membership Details' page for Partner Carlos Guerrero (ID: 40676735). The page is divided into two main sections:

- Membership Fields:** A section with a 'Save Changes' button.
- BMP: Level 4:** A section displaying membership details for Level 4. It includes a table with the following data:

BMP Level 4			
Member Dates	Expiration	Renewal Period	Years
07/28/2016 <small>Very First</small>	12/31/2016 <small>Date</small>	09/30/2016 <small>Start Date</small>	1 <small>Distinct</small>
07/28/2016 <small>Most Recent</small>	5 months <small>Time Left</small>	01/31/2017 <small>End Date</small>	1 <small>Consecutive</small>

On the major donor record, select the **Membership** tab.



**Carlos & Sara Guerrero** [Edit](#)

Partner ID: 40676735  
Salutation:  
Birth Date: 01/01/1989

Planned Giving

**MGOs Assigned**

Carlos Guerrero  
Jennifer Mitchell

**Primary Address**

3906 Sunstone Ct  
Fort Collins, CO 80525-5612

**Primary Contact Info**

Phone: (no phone numbers)  
Email: cguerrero@bernardsolutions.cor

Create Note Additional Addresses Generic Response

Metrics Touch Points Notes & Follow-Ups Inbound Activity Pledges Annuities & Bequests Membership

**Membership Fields**


[Save Changes](#)

**BMP: Level 4**

**BMP Level 4**

<p><b>Member Dates</b></p> <p><b>07/28/2016</b> <small>Very First</small></p> <p><b>07/28/2016</b> <small>Most Recent</small></p>	<p><b>Expiration</b></p> <p><b>12/31/2016</b> <small>Date</small></p> <p><b>5 months</b> <small>Time Left</small></p>	<p><b>Renewal Period</b></p> <p><b>09/30/2016</b> <small>Start Date</small></p> <p><b>01/31/2017</b> <small>End Date</small></p>	<p><b>Years</b></p> <p><b>1</b> <small>Distinct</small></p> <p><b>1</b> <small>Consecutive</small></p>
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From the membership record you can easily generate a report that tracks the success of your membership program and includes member and gift counts per level.



## Membership Revenue by Level

Client Demo - Carlos Guerrero

8/1/2016 8:53:10 AM

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Include Active Programs: False

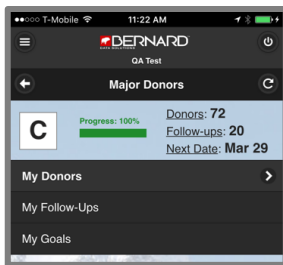
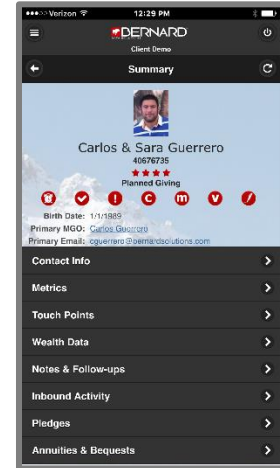
Dates between: Jan 1 '16 and Dec 31 '16

BMP - Bernard Membership Program					
Level	Member Count	Gift Count	Total Revenue	Cost	Net Revenue
Level 3	1	2	\$20.00	\$14.00	\$6.00
Level 2	306	306	\$6,120.00	\$10.00	\$6,110.00
Level 1	150	151	\$1,510.00	\$0.00	\$1,510.00
<b>Sub Total:</b>	<b>457</b>	<b>459</b>	<b>\$7,650.00</b>	<b>\$24.00</b>	<b>\$7,626.00</b>
<b>Grand Total:</b>	<b>457</b>	<b>459</b>	<b>\$7,650.00</b>	<b>\$24.00</b>	<b>\$7,626.00</b>

## MyBernard Mobile

The Partners module is now available in **MyBernard** Mobile. With this module you can:

- Search for and view partner records.
- Access and view mobile profiles.
- View a partner's revenue by year in a graphical format.
- View inbound activity
- Create notes and follow up reminders.
- View bequests and annuities.
- View and create pledges.



The Major Donors module has been updated so you can:

- Access your **My Follow-Ups** page.
- Map a donor's address.
- View your goals.

## Partners Module

In **MyBernard**, enhancements to the Partners module include:

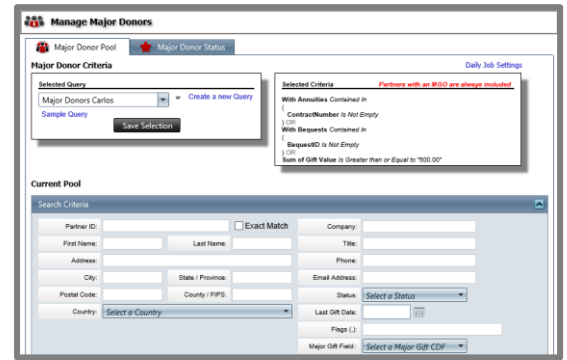
- View Donor Touch Points graph.
- View Household giving.
- View Major Donor Status.



## Major Donors Module

In **MyBernard**, enhancements to the Major Donors module include:

- Map donor addresses using Google maps.
- Import MGO Assignments.



## Other Enhancements

Additional updates have been made to **MyBernard** and include:

- Queries
  - Membership details, membership program, and nightly calculated field categories are available for the Contacts query type.
- Email Engine
  - Custom query fields are now available as merge fields in MailChimp.
- Web API
  - Return a partner's ask array values.
  - Return available event volunteer shifts.
  - Assign volunteers to event volunteer shifts.

## Questions and Answers

The table below includes frequently asked questions and answers for this release.

Feature	Question	Answer
Membership	Can you use this feature for someone who reaches a specific lifetime amount?	Yes, within the Membership module you can setup a query based on lifetime giving amount (or any 'Contacts' query) to identify who qualifies for a certain membership level.
Membership	How can this feature be used for open ended memberships?	The Membership module includes "conditions" which provide you with flexibility to manage many different types of membership programs, including open-ended memberships.
Membership	Is an appeal required when creating membership levels?	No, inclusion in or response to an appeal is not required criteria for creating a membership level. A donor can qualify for a membership level based on meeting any one (1) of many triggers you setup.
Membership	How do we identify individuals who are no longer associated with a membership level?	On the Partner record in the <b>Actions</b> pane click the <b>Membership Details</b> link to view all membership-specific custom data fields you can include in queries.
Membership	How do we assign new benefit SKUs on a monthly basis for a membership level?	With the Membership Module you can manage all aspects of your program. You can edit the SKUs as often as you want and we can talk through this in more detail with you to identify your specific needs.
Membership	Can we manage more than one membership program?	MyBernard can support unlimited Membership programs. Each is program is completely distinct and independent of each other.

Membership	How do we assign a name to the Membership Type and track in custom fields?	When creating membership levels, users can customize the <b>Membership Name, Program Name</b> and <b>Description</b> to fit the needs of your organization. These fields are also stored as fields in the <b>Membership</b> section of each Partner record.
Membership	How do we convert current membership data?	Please contact the Bernard Support team for details on how to convert your current membership data.
MyBernard Mobile	How do we view the MyBernard mobile web app?	Simply visit <a href="http://www.mybernard.com">www.mybernard.com</a> from your mobile device to access our mobile web app. No download required.
MyBernard Mobile	Can we view the revenue by year graph in the mobile web app?	Yes, this graph can be found within both the mobile web app and desktop browser versions of MyBernard.
MyBernard Mobile	Can we use location services to identify donors near me?	Yes from the Major Donors module users can leverage Google Maps technology to quickly identify nearby donors based on the donors' address.
MyBernard Mobile	Will notes added from a mobile device be accessible from the Major Donors module in <i>MyBernard</i> ?	Yes, any notes added to a Partner record via the mobile web app will be accessible in real-time in the Partner record within MyBernard. All rights and policies pertaining to MyBernard for user access pertain to the mobile web app as well.
MyBernard Mobile	How do we add the Membership and Major Donors modules to <i>MyBernard</i> ?	Please contact Bernard Support or your White Glove Services team member for next steps.