

The **Membership** application allows you to define special types of user membership for the website (or globally for all sites in the system).

Within the security model of Kentico, membership objects perform a function similar to [roles](#). Users that belong to memberships are authorized to perform certain actions on the website, access secured content or similar. However, memberships do not directly allow individual permissions, but instead group together one or more existing roles. When a membership is assigned, it grants the given user the sum of all permissions defined for the contained roles.

Typically, a membership will be associated with a certain product, which can then be purchased by users through the website's ecommerce features. This will allow them to gain access to restricted sections of the website or other types of premium content for a specified amount of time. For additional information about how you can offer various types of website membership as products, see [Managing E-commerce memberships](#).



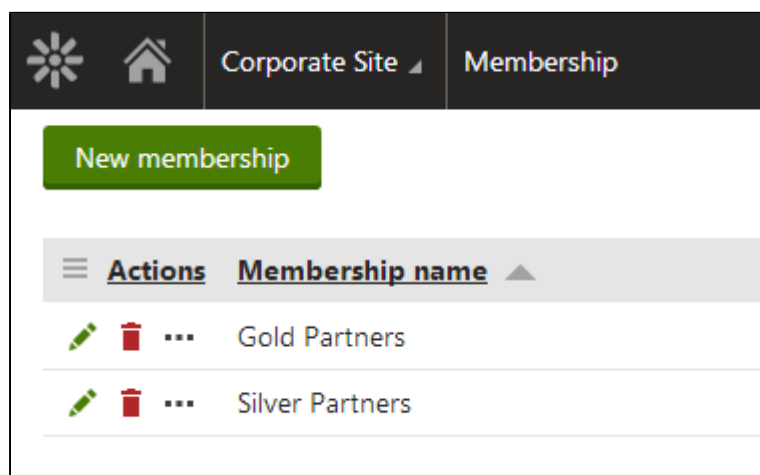
#### Memberships versus roles

Memberships are mainly intended to be used in combination with ecommerce for live site users and customers, or for other specific purposes where an additional security layer that groups together multiple roles is useful.

If you need to define authorization options for different types of users, such as content editors or administrators for specific applications, it is recommended to do so directly using standard roles.

## Managing memberships

You can manage memberships in the **Membership** application.



Memberships can either be assigned to a specific site or defined as global objects that are available for all sites. You can select the site context using the **Site** dropdown list at the top of the page. Only the Global administrator can manage global objects.

You can specify the following properties when creating a new membership:

- **Membership name** – sets a name for the membership which is displayed in the administration interface.
- **Membership code name** – sets a name that serves as an identifier for the membership.
- **Membership description** – can be used to enter an optional text description for the membership.

There are four tabs available when editing a membership:

### General

On this tab you can edit the same properties that were specified when the membership was created.

## Roles

On this tab you can define which roles which the membership should contain. When the membership is assigned to a user, it will grant all permissions allowed by the specified roles until it expires.

To add roles, click the **Add roles** button and check the boxes next to the appropriate roles in the displayed selection dialog. Only roles that belong under the same site as the membership can be chosen (global memberships may only contain global roles).

If you need to add a role under multiple memberships, you can do this more quickly in the **Roles** application by editing the given role on its **Memberships** tab. There you may easily assign the role to any number of memberships using a single action.

## Users

On this tab you can view which users are assigned to the currently edited membership. For as long as their membership is valid, the listed users will be authorized to perform any actions allowed for the roles that the membership contains, as defined on the **Roles** tab.

Typically users will be added automatically when they purchase the membership as a product, so it is not necessary to manually assign them one by one. The purpose of this tab is to allow administrators to monitor the membership and override its settings if necessary.

If you wish to add users, click the **Add users** button and check the boxes next to the appropriate users in the displayed selection dialog. Only users who are assigned to the same site as the membership can be chosen (global memberships may be assigned to all users in the system).

## Select users

User name or its part:

Search

Select all


Deselect all

<input type="checkbox"/>	User
<input type="checkbox"/>	<a href="#">Andrew Jones (Andy)</a>
<input type="checkbox"/>	<a href="#">Global Administrator (administrator)</a>
<input type="checkbox"/>	<a href="#">Luke Hillman (LukeH)</a>
<input type="checkbox"/>	<a href="#">Public Anonymous User (public)</a>
<input checked="" type="checkbox"/>	<a href="#">Sam Serious (Sam)</a>
<input checked="" type="checkbox"/>	<a href="#">Sample Gold Partner (gold)</a>
<input type="checkbox"/>	<a href="#">Sample Silver Partner (silver)</a>
<input type="checkbox"/>	<a href="#">Sean Gaines (SeanG)</a>

Items per page 10 ▾

### Membership properties

Valid to:


 [Now](#)

Send notification:

☐

Save & Close

Using the **Valid to** field you can specify the exact date and time when the membership should expire for the given users. If this field is left empty, the users will be assigned to the membership for an unlimited time period. If you set an expiration date for the membership, you can also select the **Send notification** check box to enable email reminders that will be sent to the selected users before their membership ends. For more about notification emails, see [Membership expiration reminders](#) below.

Using the **Change validity**  action you can prolong or shorten the time interval for which the user should be assigned to the membership. This way you can set an expiration date or reactivate expired memberships for users.

## Products

This tab displays a list of products with which the membership is associated, as well as additional details. When purchased, these products assign the membership to the customer along with the authorization options that it provides. Membership as a type of product is described in [Managing E-commerce memberships](#).

## Setting memberships for users

It is also possible to directly manage the memberships of individual users via the administration interface in the **Users** application.

When editing a user, switch to the **Membership** tab where you can add or remove memberships to/from the user. Note that global memberships can only be assigned by users with the Global administrator [privilege level](#). Using this approach, you can set an expiration date for each of the memberships assigned to the user.

### Displaying memberships on the live site


The My account web part from the **Membership -> Logon & Registration** category can be used to allow users to view a summary of their current memberships on the live site. If its **Other tabs -> Display my membership** property is enabled, the web part will display a list of all memberships assigned to the current user and their expiration dates.

The web part may also be configured using its **Memberships -> Memberships page URL** property to generate a link to a page where users can buy new memberships for the website or renew existing ones.

## Membership expiration reminders

To help users keep track of their memberships and ensure that they know when it is necessary to renew a paid membership, the application includes an automatic notification feature.

There is a global [scheduled task](#) named **Membership reminder** that periodically checks memberships (once per day by default) and sends a notification email to users whose membership will expire within the amount of days specified by the **Settings -> Security & Membership -> Send Membership reminder (days)** field. You can configure this task and setting as needed.

 The **Membership reminder** scheduled task is a global scheduled task and works by default only for global memberships. If you use site memberships, you need to clone the scheduled task to the specific site.

To clone the scheduled task to a specific site:

1. Open the **Scheduled tasks** application.
2. Next to the **Membership reminder** task, click **Other actions** (⋮) -> **Clone**.
3. In the dialog, click **Show advanced settings**.
4. In **Clone to site**, select the site.
5. (Optional) Set the other fields as desired.
6. Click **Clone**.

These reminders are only sent for memberships that were assigned with the **Send notification** flag enabled and for those that were purchased as a product with a limited duration. The content of the reminder emails is taken from the **Membership - Expiration notification** email template, which can be edited via the **Email templates** application.

HTML version

```
The following memberships will expire soon:
<br />


{%MembershipsTable.ApplyTransformation("Ecommerce.Transformations.Order_MembershipsTable")#%}

<br />

To renew it, please follow these steps:

<ol>
<li>In My profile section on My memberships tab, click <strong>Buy membership</strong>. You will be redirected to the Buy membership page.</li>
<li>Choose the required membership and add it to your shopping cart.</li>
<li>Finish your order.</li>
<li>Once you pay the order, your membership will be renewed.</li>
</ol>

This is an automatic reminder, please do not respond.<br />
Thank you.
```



When editing this email template, you can use the **{% MembershipsTable %}** context macro to insert a list of all memberships that will soon expire for the given user. This list must be formatted via a **Text/ XML** type [transformation](#), which you can specify through the *ApplyTransformation* method, for example:

```
{%MembershipsTable.ApplyTransformation("Ecommerce.Transformations.Order_MembershipsTable")%}
```

In addition to this special macro, you can also use all other standard [macro expressions](#) in the templates.