Membership Entity: A White Paper

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The Demand for Membership Management Modules

Interactive membership websites are a type of service that users are coming to expect. Members of clubs, fan sites, and other types of organizations are demanding the ability to accomplish more of their typical membership functions within the website, and the leaders of those organizations have an obligation to deliver. This isn't a change that cropped up over night, in truth the underlying technologies to provide at least the basic features of a membership site have been in place for years. To underscore this, a quick search of the membership site plugin market for Wordpress reveals a thriving ecosystem of developers providing tools for turning a basic blog into a channel for generating revenue and securing content. Unfortunately, one cannot quite say the same thing about Drupal. Sure, there are some modules and third-party systems that can be cobbled together to make a working system, but these solutions typically have deficiencies which leave the developer team with more challenges later on.

Existing Drupal Membership Solutions

The current state of membership solutions for drupal websites essentially includes two general methods, "buy a role" or "CRM integration".

The "buy a role" method involves using a system like Ubercart or Commerce, plus additional modules like Rules and Commerce Subscription to grant roles to a user after purchasing or signing up for a membership. The roles system is then utilized to prevent access to secure content that only members can see.

CRM integrations like RedHen and CiviCRM are excellent modules providing great functionality from a customer relationship standpoint, but they also have submodules or features to establish a basic membership site experience.

The Downsides of these solutions

If you desire a more robust membership solution for your website, then any of these solutions will eventually present one sort of problem or another. For instance:

- What if your members want to have multiple users per membership?

- What if you want to keep a history of membership terms? This is something that could be useful for a loyalty rewards system.
- What if you want to be able to add bonus time to a membership? Often, organizations run promotions where they will end up wanting to give some kind of bonus time on a membership as a reward.
- What if the customer wants the solution to be 100% Drupal, with no third-party software? If data is stored in multiple places or within proprietary software it can be difficult to manipulate.

The Membership Entity Module

The Membership Entity module has been designed from the ground up to be a dedicated, versatile, and extensible solution to the demand for a Drupal-based membership website.

Overview of features.
- It is built upon the entity framework of Drupal 7 (hence the name) thus ensuring interoperability with essential tools like Views or Rules. Automatic integration with these systems can shave off a lot of development time, making it easy to create reports or special rules actions to act on member data.
- The memberships are entities and so can be tracked or manipulated independently of the Drupal user account. Less hacking of the user module. Memberships are also fieldable by type, allowing a great deal of customizability for meeting an organization's structure.
- And of course membership terms are also their own type of entity, making it possible to keep a historical track of things like first terms joined, renewals, lapses, etc. The configuration of terms is very granular and modifiers can be added to their length, overall providing a significant amount of control.
- Importantly, the approach of this module's development has been to be as generalized as possible, while still being full featured, in order to handle a variety of differing use cases and customer needs. Where assumptions cannot be avoided the pluggable nature of the Drupal hooks system facilitates overriding functionality to meet your needs.
- Additionally it is being released as a contributed module to Drupal.org and not as a commercial product.

What this is not .
- The "Membership Entity" module is in no way connected to the existing "Membership" module. This is a completely separate project that is centered around using the Drupal Entity API.

- The "Membership Entity" module is not a Customer Relationship Management (CRM) solution. See the Redhen suite of modules (https://www.drupal.org/project/redhen) if you need a Drupal based CRM.

Memberships In Action

Part of the reason Monarch Digital sponsored the development of this module was because we recognized the need for a comprehensive membership management interface. With each new customer project that requires a membership site, the underlying codebase is improved and the Membership Entity module evolves. Here is a sample list of organizations utilizing the Membership Entity system within their websites:

- Porsche Club of America (http://www.pca.org)
  - D7 – Membership Entity v1.0 Custom ubercart integration
- Colorado Emergency Management Association (http://cemacolorado.com)
  - D7 – Membership Entity v1.0 Custom ubercart integration
- North American Rock Garden Society (https://www.nargs.org)
  - D7 – Membership Entity v0.1
- Catalina 36 International Association (http://www.c36ia.com)
  - D7 – Membership Entity v1.0 Commerce integration v1.0

Comparing Membership Entity and Organic Groups Modules for Membership Websites

The release of the new Membership Entity module has brought up a number of good questions regarding its relationship to existing modules. One comparison in particular relates to similar aspects of Membership Entity and Organic Groups.

- https://drupal.org/project/membership_entity
- https://drupal.org/project/og

If you haven't heard of or used Organic Groups before, essentially it is a module that allows you to organize your site into different groups that users may join. Groups can have their own content and access rules. It is quite useful and excels when developing a system like an online school, with courses and students, and sharing of content within the context of the virtual classroom.

More Than One Solution

Organic Groups is much like many other Drupal modules, in that it can be extended or repurposed for functions outside of its core use cases. With add-on modules, it can be used to create a working membership-based website, allowing users to buy or gain access to groups that grant them special access.

Membership Entity will obviously never be the only way to make a Drupal membership website, and beyond it and Organic Groups there are still other modules that can be used to accomplish the required feature set. They may not even be mutually exclusive. But, for many use cases and organizations a solution like Membership Entity module will be a more effective and efficient path towards achieving this.

Multiple Users Per Membership

One specific feature of the Membership Entity module that no other module seems to provide well, is the ability to associate more than one user under the context of a single membership. This was a requested feature for enough clients that it became one of the main reasons we developed the module.

You might say, couldn't they just log in with the same account? For several reasons, this is not an ideal solution, if one could consider it a solution at all. Sharing a login and password may not be appropriate or acceptable to many people, and may be a sticking point with users. As well, if they have distinct metadata that shouldn't be shared (different addresses, notifications options, etc.) or other info pertinent to the structure of the organization, this becomes an issue with shared login accounts.

Membership Terms

Another area of functionality where Membership Entity is quite useful is when the organization needs a membership term based history that functions independently of order transactions. If you're only relying on a transaction report for a term history you'll likely just get the start date (date of purchase) but won't easily get the term length or end date unless it's factored into a product type.

Adding modifiers, such as an additional two months free for example, without a new transaction would also be difficult. By providing terms as their own entity, Membership Entity makes it

easier to modify the term while also providing a robust history of a user's membership with a complete set of metadata.

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Overall, the most important things to consider are what you're trying to accomplish and if the module at hand achieves this effectively. More often than not, a module that is purpose-built for a specific set of use cases will require less work to get working than making another good module do something outside of its core scope. Organic Groups is a great module that provides a lot of the features needed for developing a basic membership site, but may require more effort than necessary to provide the kinds of features that a large-scale membership organization will require. We've developed comprehensive membership sites for a number of these organizations. The membership entity module was designed to provide most of the core business functions required by these organizations out of the box.

FAQ

What was membership entity originally designed for?

- Multiple user accounts associated with a single membership. All user accounts associated with a single membership should have their roles added/removed when the membership is active/expired.
- Managing a history of terms associated with a membership. This is useful for determining membership lapses for loyalty rewards programs

How can it help my project?

- Provides an out-of-the-box solution for membership sites.
- Easy to install and configure (no third-party libraries required).
- Integrates with the most popular commerce modules (commerce and ubercart).

How can I find help with using it and how can I use its full effectiveness?

- Read README.txt.
- Documentation at https://www.drupal.org/node/2279343.
- Support requests at https://www.drupal.org/project/issues/membership_entity?categories=4

● Contacting Monarch Digital

Do you keep it up to date? (Bug fixes, documentation)

We try to respond to support requests and issues as they are reported. If you would like a custom feature or help with your site, contact Monarch Digital.

How do I find support?

Membership Entity was released as a contributed module to Drupal.org and not as a commercial product. Support can be found by either contacting Monarch Digital directly (Yes, you can speak to the original developer) by calling 719-533-0553 or by visiting the membership entity drupal.org page @ (https://drupal.org/project/membership_entity) and submitting a ticket.

Check Out the Project

For additional information about how to install and configure this module, please visit the project page at Drupal.org (**https://drupal.org/project/membership_entity**)