

# STEP-BY-STEP DUES AND MEMBER MANAGEMENT

## PAY DUES

### >ORDERS

- 1) Click MANAGE
  - Members are in Alpha, or ID # order
- 2) Click box next to name of member paying dues
- 3) Click CREATE ORDER
  - Review Pending Order
- 4) Check "I have reviewed this new..."
- 5) Click SUBMIT

**Order has been created**

- 6) Click PRINT.
  - Make copies to send with payments & for your records.
- 7) Send checks. Include order # in the memo line.

**Note:** Never make a change to the order form. Call HQ if there is an error.

## ADD MEMBER

### >MEMBERS

- 1) Click ADD/TRANSFER
- 2) Complete as much info as possible
- 3) Click SEARCH
  - "Success! We did not find a match..."
- 4) Click CONTINUE CREATING NEW MEMBER
- 5) Complete New Member Form 81. Send Copy to State Treasurer.

**Click SAVE and CLOSE**

- 6) Return to Order Management to post and pay dues.

**Note:** New Members may be added at any time.

## TRANSFER MEMBER

### >MEMBERS

- 1) Click ADD/TRANSFER
- 2) Complete as much info as possible. ID # is preferred.
- 3) Click SEARCH
  - "Notice! We found the following possible matches."
- 4) TRANSFER
- 5) Confirm Transfer

**Click SAVE and CLOSE**

**Note:** Members may be transferred at any time, and must be done by the chapter the member is transferring into.

## REINSTATE MEMBER

### >MEMBERS

- 1) Click ADD/TRANSFER
- 2) Complete as much info as possible. ID # is preferred.
- 3) Click SEARCH
  - "Notice! We found the following possible matches."
- 4) Click REINSTATE
- 5) Select membership type from the dropdown menu
- 6) Click SUBMIT

**Click SAVE and CLOSE**

- 7) Return to Pay Dues to post & pay dues.
- 8) Complete "Reinstate Member Form 83" -> Send copy to State Treasurer

**Note:** Members may be reinstated at any time, & pay full dues.

## MANAGE MEMBER INFORMATION

### >MEMBERS

- 1) Click MANAGE
  - Members are listed by ID #
- 2) Click arrow in LAST NAME to sort
- 3) Locate the member to update
- 4) Click EDIT
- 5) Update their membership type (Active > Reserve, etc.) & contact HQ for correct billing.
  - Other edits can be made without contacting HQ.
- 6) Click SAVE
  - "[Name] has been successfully updated!"

**Click SAVE and CLOSE**

**Note:** Membership type changes (Active > Reserve, etc.) must be made prior to posting dues.

