



OF4WD Membership Management Guide

August 19th 2015

Prepared by Kim Sibbles



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1. Introduction to the OF4WD Membership System

The OF4WD made the decision in 2015 to purchase a membership management system called Membee. This system is developed by a company in Calgary and is used by hundreds of not for profit organizations to manage their membership. Because this system is not a custom made solution we are able to get support from the vendor who made the software by sending an email or making a phone call. We also get access to new features regularly so the system never gets out of date.

This system is a hosted system which means it lives on a server in a data centre. We do not manage the server it is on. It is accessed by the internet via a web browser and is connected to our website to help manage our members only area.

To access the membership system you will need to go to the url below and login using these credentials. The OF4WD decided only to purchase one administrator login so this username and password must be shared with approved users only!

<http://1089.membee.com>

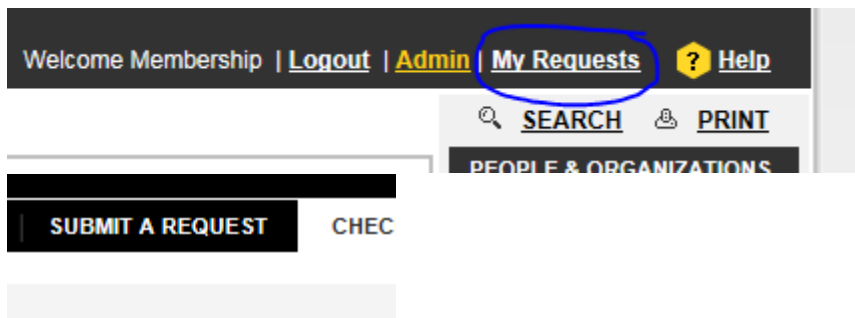
username: admin@of4wd.com

password: membee99

1.1 Contact Information for Membee

Membee is also known as IRM Systems and is located in Calgary. There are multiple ways to contact them:

- Open a ticket from within the membership screens. Click on my requests in the top right of the screen. Then click on submit a request. * Note you must be logged into the membership system as an administrator in order to do this.



- Send an email to support@membee.zendesk.com. Be sure to state you are submitting your request on behalf of the of4wd.

1.2 Learning your Way around Membee

Membee has a great help site. All new users of this system should start by going through the “I’m a NewBee” Tutorial. This will familiarize you with the user interface, how the menus work and how to perform basic functions. It can be found here.

<http://membee.zendesk.com/entries/20421997-I-m-a-NewBee-Get-Started-Here>

1.3 How the OF4WD Uses Membee

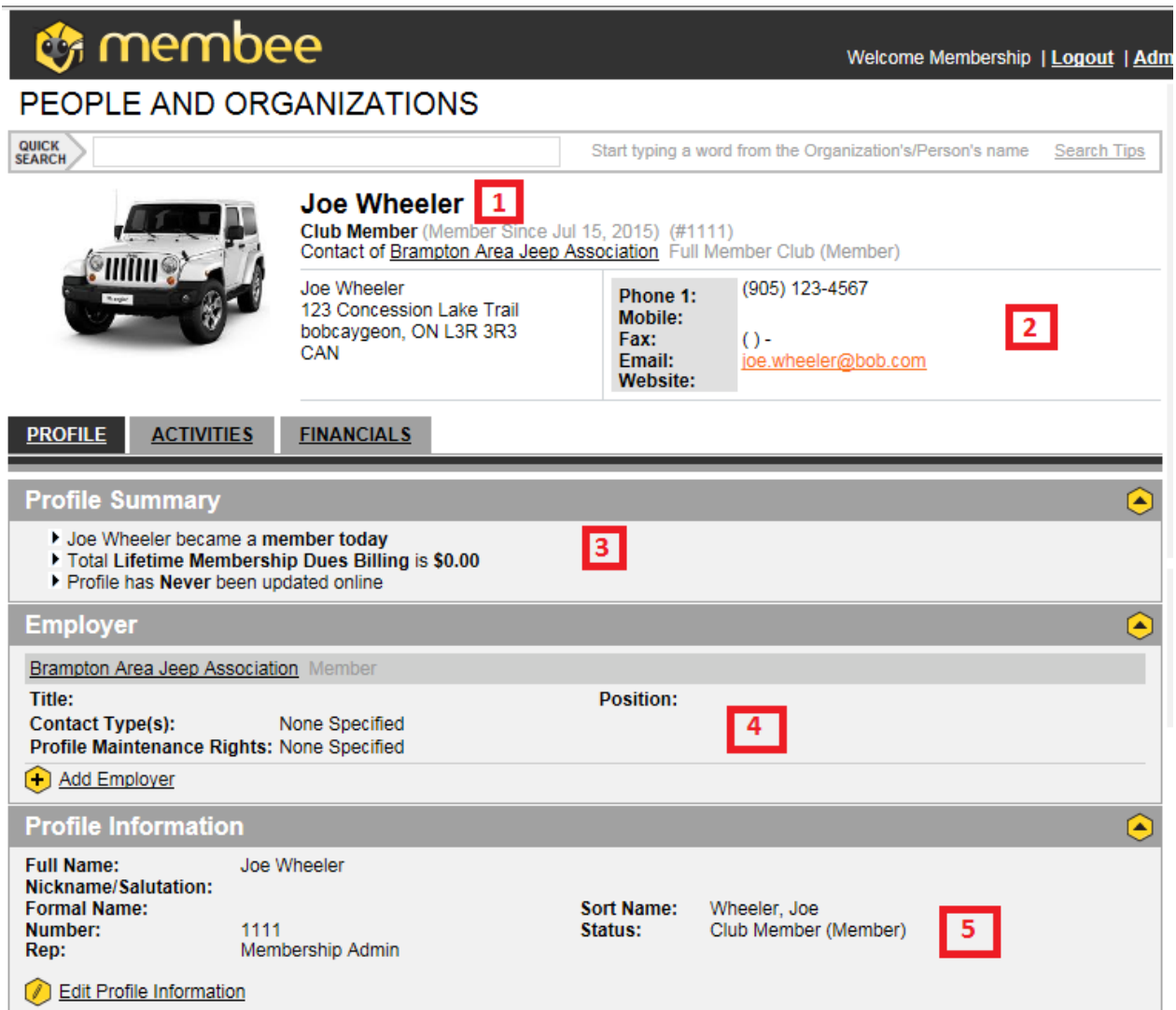
Although Membee is a standard tool and there are many great help documents available on their site about how to perform basic functions, there are some specific processes and guidelines that the of4wd has developed to help us consistently use this system. The rest of this document focuses on these processes.

It is assumed that before you read the rest of this document you have already completed the “I’m a Newbee” tutorial above. We will be using membee terminology and making assumptions you know how to perform basic tasks.

2 Understand the Member Record

Membee has a lot of information available on how the member record works. You can find that on their help site. Below we are outlining how the OF4WD is using these various fields in the member record to store our information. The following section will describe what each of these fields mean for our membership.


2.1 Profile Tab



membee Welcome Membership | [Logout](#) | [Admin](#)

PEOPLE AND ORGANIZATIONS

QUICK SEARCH Start typing a word from the Organization's/Person's name [Search Tips](#)



Joe Wheeler 1
Club Member (Member Since Jul 15, 2015) (#1111)
Contact of [Brampton Area Jeep Association](#) Full Member Club (Member)

Joe Wheeler 123 Concession Lake Trail bobcaygeon, ON L3R 3R3 CAN	Phone 1: (905) 123-4567 Mobile: Fax: () - Email: joe.wheeler@bob.com Website:
---	---

2

PROFILE | **ACTIVITIES** | **FINANCIALS**

Profile Summary

- ▶ Joe Wheeler became a member today 3
- ▶ Total Lifetime Membership Dues Billing is \$0.00
- ▶ Profile has **Never** been updated online

Employer

[Brampton Area Jeep Association](#) Member

Title:	Position:
Contact Type(s): None Specified	4
Profile Maintenance Rights: None Specified	

[+ Add Employer](#)

Profile Information

Full Name: Joe Wheeler	
Nickname/Salutation:	
Formal Name:	
Number: 1111	Sort Name: Wheeler, Joe
Rep: Membership Admin	Status: Club Member (Member) 5

[Edit Profile Information](#)

Custom Fields ▲

Organization Notes: Total Member Count: 0.00
Screen Name: Vehicle Year: 9
Vehicle Make & Model: Profession:
Membership Notes:

[Edit Custom Fields](#) You have defined 7 of 55 custom fields available. Click [here](#) to find out more.

Key Dates ▲

- Last modified in **Administrative Interface** (by Membership) on **Jul 15, 2015** at 11:05 AM
- Became a **Member** on **Jul 15, 2015**
- Record **originally created** on **Jul 15, 2015**
- Last contact date has **not** been set
- Began business date has **not** been set

[Edit Dates](#) 10

Relationships ▼

Membership Dues ▲

- Membership dues billing is **Not** enabled

[Edit Membership Dues Details](#) 11

Access Information ▲

Method: Undetermined (Pending) 12
Email:

[Send Reset Login Email](#)
[Deactivate User](#)

Program Permissions ▲

Programs	Roles
Member Service Center	
Website	Trail Index

[Add Program](#)

Communication Consent ▲

Communication consent **has been granted** 13

Date of Consent: Jul 15, 2015 11:04 AM
IP Address: 69.42.184.99
Consent Set By: Membership Admin
Consent Location: Manual Record Update

[Edit Communication Consent](#)

Diagram #	Description	Use
1	Basic Demographics (view only)	This header section shows basic member info at a glance. If you need to update it you will do so in sections below. The header includes information such as: Member Name Member type (Club individual) How long they have been a member Member number


		Club if they are in one
2	Contact Information (view only)	This header section includes basic member contact info at a glance. If you need to update it you will do so in sections below. Here you see mailing address, phone numbers and email.
3	Profile Summary (view only)	This section shows a snap shot of member activity, when they joined any any billing related info. Note club members always show no billing info as the clubs pay for them they don't pay for themselves Individual billing info is only since moving to membee system, (since June 2015) does not carry over dues paid in old system as we did not have good enough records.
4	Employer/Club Section	This section shows any club or Sponsor the member is affiliated with. The system uses the word Employer here (we can't change that) but the members will see the proper words Club or Business when the login to the website. You can also add or edit clubs or businesses in this section of the profile. If the member holds a position in a club it is listed under position. If they are a main contact or a billing contact it will be listed under contact type If they have rights to edit club or sponsor info on the website it should say "manager" beside profile maintenance rights.
5	Profile Information	This section will show key member info. You can edit any of this info in this pane as well. Member Number Membership type (Club, Individual) Name Note changes to membership type may have billing impacts so do not update this without first referring to proper process in this document.
6	Categories & Types (Custom fields)	These fields contain some of the custom information we track for our members. System admins can create new ones if required. Experience Level (entered when a member joins or renews) Trail Quiz Complete (only used for import purposes will not be kept up to date) Requires printing (used in membership printing routine to indicate reprints required) Refer to membership mailout section for details.
7	Addresses	This section lists all available addresses for a member. Their personal address is the mailing or

		primary address. But it will also list the address of any affiliated club or business.
8	Communication Info	Similar to addresses you will see the personal information listed first followed by the club or business information.
9	Custom Fields cont'd	<p>These are some additional custom fields not listed in the categories section. Includes free text items. This information is mostly collected via the member profile during renewal or signup.</p> <p>Organization/Membership Notes (imported from old system. Only for historical purposes) New notes will be on activities tab.</p> <p>Screen Name</p> <p>Vehicle Make & Model</p> <p>Vehicle Year</p> <p>Profession</p> <p>Total Member count (to be used in future for club member billing)</p>
10	Key Dates	This section shows information generated by membee about when a member was last updated etc.
11	Membership Dues	This section is note used for club members but is used for Clubs and Individual members. It is very important as it drives renewal process and ensure members are billed each year. If a member changes from Club to Individual this needs to be setup (see section of this document on changing member status)
12	Access Information	<p>This section controls the members access to our website. It is not used for clubs or businesses only people.</p> <p>Member Service Centre Program allows them to update their profile online.</p> <p>Website allows them to see member area of site if their membership is current</p> <p>Trail Index field tied to Website access shows they have completed quiz and can access trail index as well.</p> <p>Note Website admins will be responsible for managing this area. If something looks off here defer to them to troubleshoot.</p>
13	Communication Consent	We are required by law to allow members to opt out of any email communication. Every time they fill out an event registration, renew, or join they are asked if they consent to communication. This section records their response. If this is set to no, they will not receive any messages from our system.


2.2 Activities Tab


This tab contains information about any events the member is or has attended and notes. It is only visible to admins via member not to members. It is a good place to come to confirm if a registration went through, or if a member updated their info etc.

PROFILE **ACTIVITIES** FINANCIALS


Activity Summary 

- ▶ 0 To-Dos completed (in total)
- ▶ 2 Notes added (in total) 14
- ▶ Attended 0 Events and registered to attend 0 future events
- ▶ Member of 0 Committees and 0 Groups

Notes & To-Dos 


Active 


Due Date	User	Task
There are no active Notes or To-Dos		


History 


Search: Select User (Date) To (Date) Go

Date Completed	User	Result
Jul 15, 2015	Admin, Membership	Email delivered. Recipient: joe.wheeler@bob.com Subject: New OF4WD Website!! Message: Joe, Welcome to the OF4WD! Below you will find information to access our website members area. Username: Your email address this notice was sent to 15 More
Jul 15, 2015	Admin, Membership	Communication consent has been granted Date: Jul 15, 2015 IP Address: 69.42.184.99 Consent Set By: Membership Admin Consent Location: Manual Record Update More

 [Add Note](#)


 [Add To-Do](#)


Groups & Committees 


Current Groups & Committees 


Search: 16 Go


There are no active groups or committees

Groups & Committees Participation History 

 [Add Joe Wheeler to a Committee](#)


 [Add Joe Wheeler to a Group](#)


Events 

Active 

Search: 17 Go

Event Start	Event	Represented By
There are no future events		

History 

 [Add Joe Wheeler to an event via quick sale](#)


 [Add Joe Wheeler to an event](#)

Diagram #	Description	Use
14	Activity Summary	Shows a summary of members activities
15	Notes & To Dos	This section will show any system notes included copies of email messages sent by system to

		member, updates member made to their profile, event registration etc. It will also show any notes manually added to the members file by our admin team or changes we make to their info. It is an audit trail of sorts of all activity with the member.
16	Groups & Committees	This section is currently used to track Board members only. It helps us to assign members to the board and in turn grant access to specific parts of the website to those members.
17	Events	This section will show details of any event registration past or future and a link to the details of the registration.

2.3 Financials Tab

This tab contains information about any events the member is or has attended and notes. It is only visible to admins via member not to members. It is a good place to come to confirm if a registration went through, or if a member updated their info etc.

This tab shows the details of any financial transactions that the member has performed (renewals, joining, event registrations etc). When the transaction is performed on our website it is automatically logged and shown here. If it is a manual or cash transaction it must be entered manually (ie member pays cash for membership at show). See section of this document on in person membership transactions.

The screenshot shows the 'FINANCIALS' tab selected in a member profile. The interface includes several sections:

- Financial Summary:** Shows 'Total Lifetime Membership Dues Billing for Joe Wheeler is \$0.00' and 'Total Lifetime Event Billing for Joe Wheeler is \$0.00'.
- Current Invoices:** A table with columns: Invoice #, Date, Description, Due Date, Age, Amount, Balance. It states 'There are no current invoices'.
- Current Credits:** A table with columns: Date Issued, Reference, Reason, Amount. It states 'There are no current credits'.
- Transaction History:** Includes a search bar with 'Search:', 'Select Transaction Type' (dropdown), '(Date)' (dropdown), 'To (Date)' (dropdown), and 'Go'. Below is a table with columns: Date, Description, Due Date, Amount, Balance, Credit. It states 'There are no historic transactions'.
- Charitable Receipts:** States 'There are no charitable receipts posted.'
- Other Financial Details:** Includes checkboxes for 'Receives membership invoice notifications by email', 'Receives event invoice notifications by email', and 'Not Tax Exempt'. An 'Edit' button is at the bottom.

3 Managing Individual Members

3.1 Important to know

- The membee system works on the assumption that most members will renew. This is in an effort to reduce the amount of work required at renewal time. So instead of having to renew all members every year, it keeps members active unless you tell it to cancel them. We will run a batch process at renewal time to determine which members to expire (ie who hasn't renewed & paid)
- Individual members registration process is fully automated. (they join online and we don't have to do anything)
- Club membership still contains manual processes.
- The Membee System is best designed for online sign-up. Access creation billing etc is all automated and setup instantly when a member joins via our website.
- Manual entry of a new member into membee is prone to error and requires many steps from a user with admin access. It is discouraged and the board has decided to push all individual member sign-ups through our website front end with electronic payment. For Show signups a laptop can be provided to prospective members to register.

3.2 Individual member sign-up

- Member signs up online using new member sign-up widget
- Payment must be completed online
- Member will get instant access to our website. (email is sent to them with link to set password)
- Email is sent confirming renewal and states sticker will be received in 45 days.

3.3 Individual Renewal

- Annually at renewal time all members are sent an email with a link to renew. Ideally members should renew before their membership expires. If they pay the invoice for renewal their membership will not expire.
- Unlike the old website an expired member can not login. They must renew first.
- To renew, the member should go to the website, under membership click "Renew Your membership"
- Member should use same name and email as previous year to retain same member number.
- Payment must be completed online
- Member will get instant access to our website. (email is sent to them with link to set password)
- Email is sent confirming renewal and states sticker will be received in 45 days.

3.4 Switch from Club to Individual

- Member simply needs to go to our website and fill out renew membership form. It will switch them from Club to individual.

3.5 Switch from Club to Individual

- Member simply needs to attend club meet and sign up in person with club. When membership admin receives the request to add the individual to the club they will convert their membership from individual to club.
- For instructions on how to do this see section on "Process Club Roster Changes"

4 Managing Clubs and Club Members

4.1 New Club

- Club signs up and pays online using new club sign-up widget; Start a Club under the clubs section. <http://www.of4wd.com/clubs/start-a-club/>
- Club pays online
- Club is automatically created in membee
- The club main contact will be setup as a “main contact (non member)” in membee
- Club submits Roster using online Update Club Roster Form
- Membership Director manually adds all club members to club. (see Process Club Member Additions below)
- **Note** because the club main contact was already added above you can treat this person as a renewal, ie open the main contact record and modify it to change status, activate membership and add to printing group.

4.2 Club Renewal

- Annually at renewal time all clubs are sent an email with a link to renew. Ideally clubs should renew before their membership expires. If they pay the invoice for renewal their membership will not expire.
- If a club lets their membership expire they can renew on our website using the club renewal link under membership. **PROCESS TO BE FINALIZED SOON**
- Their club will be instantly renewed along with any members who they submit on the Update Club Roster Form.

4.3 Process Club Roster Changes

- Club contact should complete the update club roster form online. This form is used for both additions & renewals. <http://www.of4wd.com/clubs/club-roster-updates/>
- Club submits payment by sending money to membership@of4wd.com via Paypal and enters confirmation # in form.
- Membership admin confirms payment for club members and makes note in club file.
- To add a note search the club, click on activities, and add note. In the body of the note indicate X number of members were added and paste in member names from the email for reference. (see below for steps to add note)

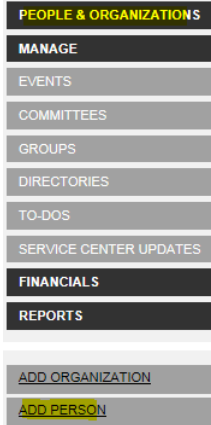
The screenshot shows the profile page for 'Krater Sudbury Krawlers', a Full Member Club. The page includes a search bar, club details (address: 20 Hanna Capreol, ON P0M 1H0 CAN), and contact information (Phone: (705) 589-3005, Email: nickel4x4@live.com, Website: http://www.nickel4x4.com). Below the details are tabs for PROFILE, ACTIVITIES, and FINANCIALS. The ACTIVITIES tab is selected, showing an 'Activity Summary' with 0 To-Dos completed and 2 Notes added. A 'Notes & To-Dos' section is visible, and at the bottom, there are buttons for 'Add Note' and 'Add To-Do', both highlighted with red boxes.

- For each member on the roster either add them or renew them following directions below.
- Search for person’s name to confirm they don’t already have a record.
- If there is a question about whether a member matches an existing member contact club to confirm. (ie sometimes people change all/most contact info)

- If a match is found confirm email or address to ensure it is the same person and proceed to instructions on renewing a club member below.
- If a match is not found follow directions below for Create a new Club member Record.

4.4 Add New Club Member

- Click on People & Organizations then Add Person on the right hand menu



- Complete the following fields for the new member (they can update the rest using their profile when they login)
 - First Name
 - Last Name
 - Status (set to club member)
 - Address Type (set to mailing)
 - Address
 - City
 - Postal Code
 - Email
- Communication Consent (set to yes)
- Proceed to steps below to link member to club, add to printing list, and grant Website Access,

4.5 Renew Club Member

- Search for club member and open record. Confirm record is correct by matching email or address to club roster. If information has changed update it.
- On Profile tab under Profile information click edit button.



- Click on magnifying class to choose correct member status of "Club Member (Member)" then click Save.


Profile Information

Full Name:	<input type="text" value="Michael"/>	<input type="text" value="Bendick"/>	<input type="text"/>
Nickname/Salutation:	<input type="text"/>		
Formal Name:	<input type="text"/>		
Number:	<input type="text" value="5585"/>		
Rep:	<input type="text" value="None Specified"/>		
Sort Name:	Bendick, Michael		
Status:	<input type="text" value="Club Member (Member)"/>		

- Proceed to steps below to link member to club, add to printing list, and grant Website Access,

4.6 Link Member to Club

- From the member record will open on the screen. Click On Add Employer to link this member to their club.



TEST CLUBMEMBER
 Club Member (Member Since Jul 16, 2015) (#8659)

TEST CLUBMEMBER 123 easy Ajax, ON CAN	Phone 1: () - Mobile: Fax: () - Email: test@tes2t.com Website:
---	---

PROFILE

ACTIVITIES

FINANCIALS

Profile Summary

- ▶ TEST CLUBMEMBER became a **member today**
- ▶ Total **Lifetime Membership Dues Billing** is **\$0.00**
- ▶ Profile has **Never** been updated online

Employer

+ Add Employer

4.7 Add to Printing List

Each new or renewed member will receive a membership package. For Individual members they are added to the list automatically. For club members you must add them manually.

- While in the member record you can click on the Activities tab

PROFILE

ACTIVITIES

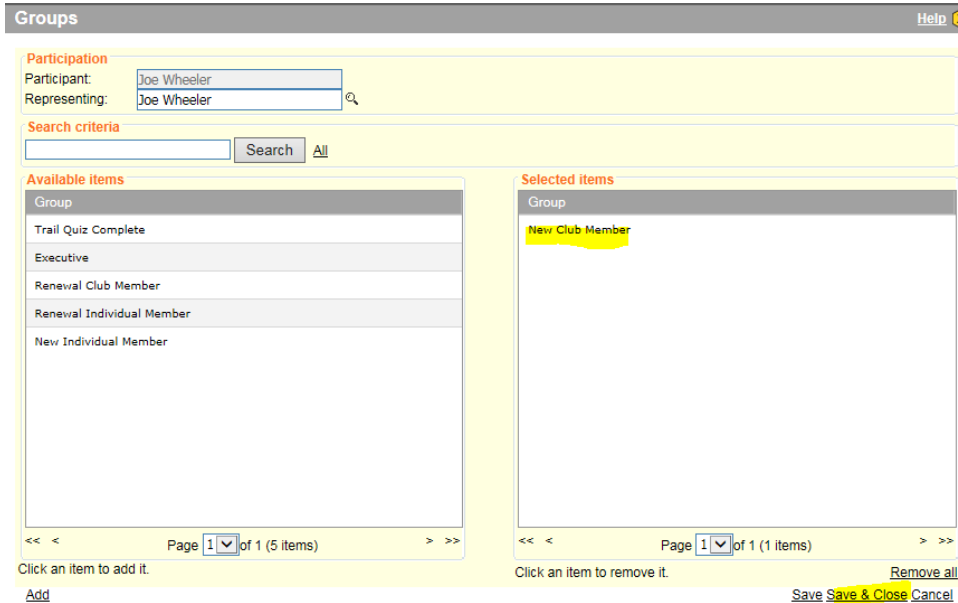
FINANCIALS

Activities Summary

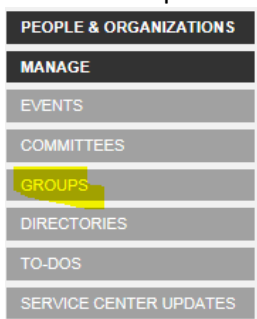
- Scroll down to the Groups section and click on the link to add the member to a group



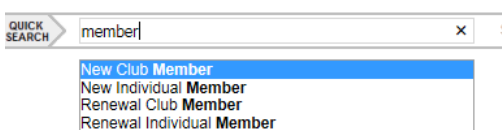
- Click on the Appropriate Group (New Club Member or Renewal Club Member). The Group will move to right hand column. Click Save & Close



- Another way to add members to the print list is in batch using the group menu item. This is an easy way to add a whole list of club members at once when you receive a large roster.
- Click on Groups in the right hand menu (under manage)



- Find the group you need to add the members to (type in word member to get list)



- Search each member and click on their name to add them to the group.
****NOTE** for club members you will see two entries for each, one is their personal contact and one is their club contact. Always choose the personal one (where club isn't listed) this will ensure card

is sent to member not their club.

The screenshot shows the 'Group Members' interface. At the top, there is a search bar with the text 'alex james' and a 'Search' button. Below the search bar, there are two tables. The first table, titled 'Available items', has columns for 'Organizat', 'Person', 'Type', 'Phone', 'Email', and 'URL'. It contains two rows: one for 'James, Alex' (Person) with phone '(905) 619-8499' and email 'alexbjame:', and another for 'Durham 4x4' (Employer) with email 'alexbjame:' and URL 'http://www...'. The second table, titled 'Selected items', is currently empty. At the bottom of the 'Available items' table, it says 'Page 1 of 1 (2 Items)'. At the bottom of the 'Selected items' table, it says 'Page 1 of 0 (0 Items)'. There are also buttons for 'Click an item to add it.', 'Click an item to remove it.', 'Remove all', 'Save', 'Save and Close', and 'Cancel'.

- Click Save & Close once all members are added.

4.8 Grant Member Access to Website

- Now you must grant the member access to the website. Scroll down to the section titled "Access Information" and Click Activate

The screenshot shows the 'Access Information' section of the interface. It has a title bar 'Access Information' with a help icon. Below the title bar, there is a 'Method: (Not Activated)' label and an 'Email:' label. A plus sign is visible to the left of the 'Activate' button, which is highlighted in yellow. Below this section is another section titled 'Communication Consent' with a help icon.

- Select Activate Member Access and click continue. Confirm email address is correct and click submit. An email is sent to member with instructions to set their password.

The screenshot shows the 'Activate User' dialog box. It has a title bar 'Activate User' with a help icon. There are two radio buttons: 'Activate Member Access' (which is selected) and 'Activate Access for Association Staff'. Below the radio buttons is a 'Continue' button.

- To enable access to the members area of the website you need to add a "program" A new section will appear below Access information once you have activated a member. Click on Add Program.

The screenshot shows the 'Access Information' section of the interface. It has a title bar 'Access Information' with a help icon. Below the title bar, there is a 'Method: Undetermined (Pending)' label and an 'Email:' label. There are two links: 'Send Reset Login Email' and 'Deactivate User'. Below this section is another section titled 'Program Permissions' with a help icon. It contains a table with columns 'Programs' and 'Roles'. The table has one row: 'Member Service Center'. Below the table is an 'Add Program' button, which is highlighted in yellow.

- Select Website and click Save and Close

5 Membership Mailout

In the Membee System membership cards and letters are printed in batch, not individually. The batch is run based on date created or date renewed (joined). The batch should be run once a month and cards printed and sent out all at once. The mailout should be done early in the month for the previous month.

- Before you begin the mailout process save the zip file below to your desktop and unzip it.
<http://www.of4wd.com/wp-content/uploads/Membership-Mailout.zip>

5.1 Run Reports for Monthly Mail out

- Go into membee and launch the reports module.
- Find the Group Report, select it
- When the report screen opens use the favourites pull down at the top to select "Membership Letters".
- Run the report
- Wait until the PDF version show a checkmark then click on the excel CSV icon to run the excel version. You will be asked to select an export. Select Mailout and Click Created Selected Export. (bottom right of window)

Area	Name	Status	PDF	CSV	Quickbooks	Bulk Email	Process	Submitted Date
Groups	Group Report	Complete						2015-08-17 1:43:00 PM

Export Name	Private	Description	Created By
Mailout	N		admin@of4wd.com

Page 1 of 1 (1 items)

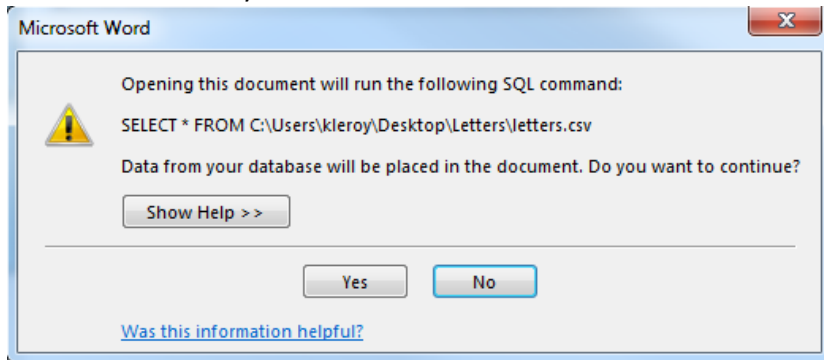
Create Selected Export Export All Fields Cancel

- Wait for the excel icon to show a checkmark then click on it and download the file to the folder you created above. Save the file as "Letters"
- Repeat the above steps but instead of using the Membership Letters Option under Favourites Choose "Membership Cards"
- Save this report file as "Cards" in the folder you created.

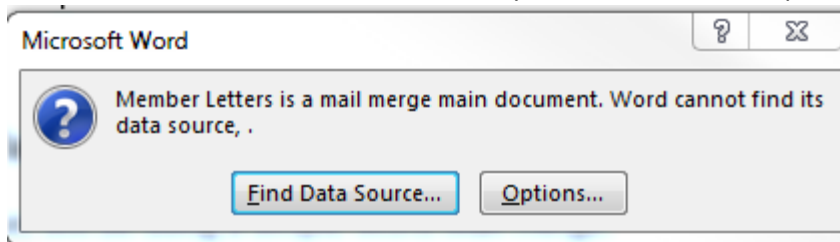
5.2 Perform Mail Merge for Monthly mail out

- For this step we will be using a simple Word Mail merge.
- Open the folder you downloaded above and launch the letters file. This file will be used to generate the letter to be sent to the members. It is used with both the renewals and the joins.

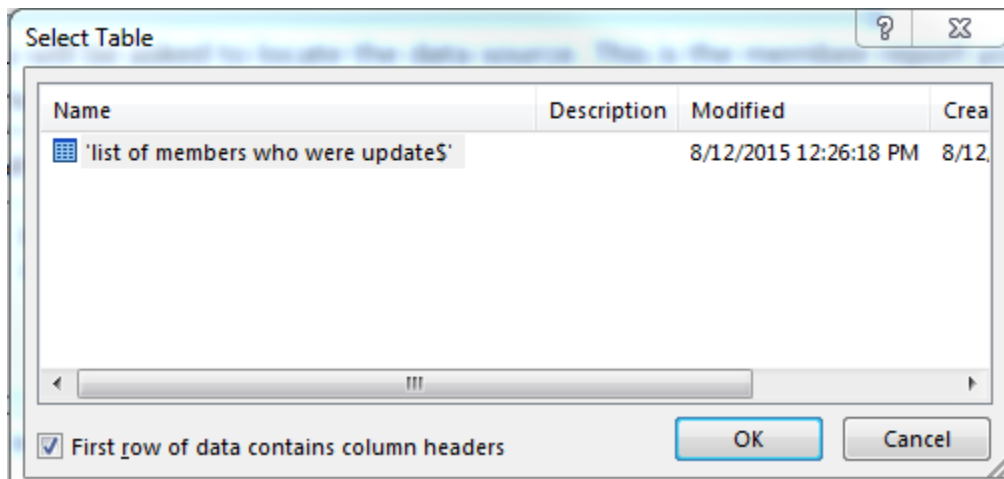
- You will be asked if you want to run an SQL command. This is the merge function. Select Yes.



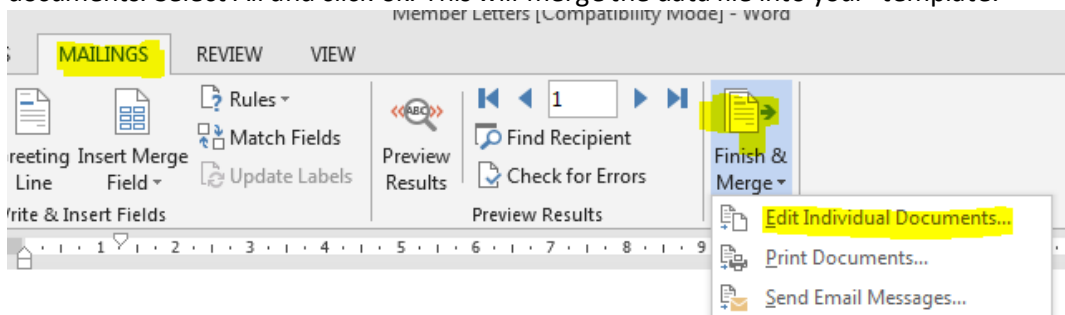
- Next you may be asked to locate the data source. This is the member report you want to use to create the letters, Select the "Letters" file you created and click open.

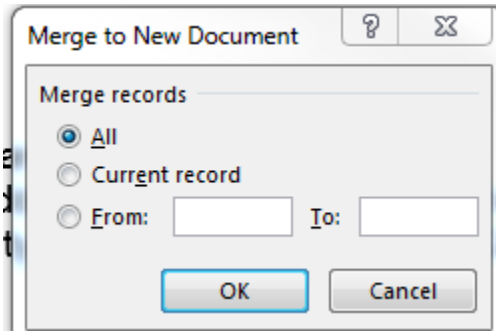


- You will may be asked to select the table. Select the only table in the list and click ok. NOTE THIS WINDOW DOESN'T ALWAYS SHOW UP.



- The template will open up in word.
- Click on the mailings tab at the top of the screen. Select Finish & Merge, and select edit individual documents. Select All and click ok. This will merge the data file into your template.



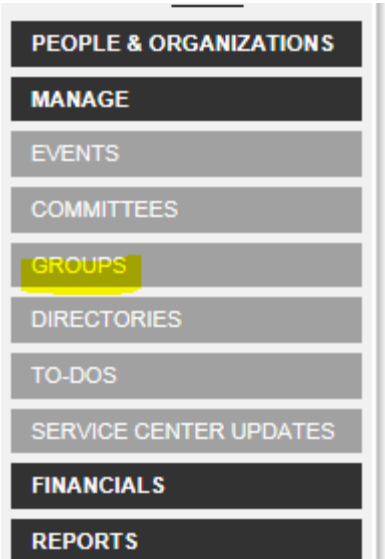


- You will see a separate Word window open up with the letters. Scroll down to preview the letters and ensure they are accurate. Print as usual. These are your renewal letters (no cards required)
- Repeat the above steps using the Cards word template and selecting the “Cards” data file to produce the New Member Cards.

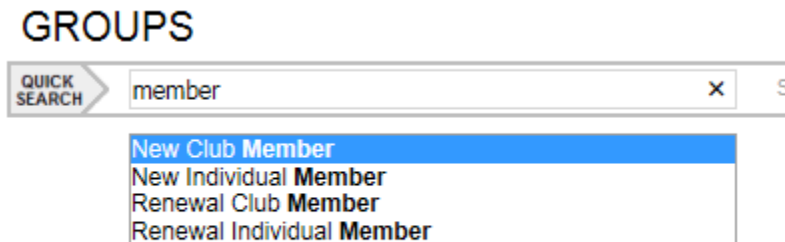
5.3 Reset Printing Lists

Now that you have completed your printing you must reset the printing list so that the items you printed are removed. This is a simple process.

- In member select groups from the right hand menu.



- Type the word “member” into the search box, you should see a list that contains all the printing groups



- Go into each of the groups listed above and perform the following steps.

- Open the group and click on the link to “Manage Group Members”

New Club Member

Group Details

Name: New Club Member

[Edit Group Details](#)

Group Members

[All](#)

Search Results

Employer	Person/Contact	Type	Phone	Email	URL
	Wheeler, Joe	Person	(905) 123-4567	joe.wheeler@bob.com	

Page 1 of 1 (1 items)

[Manage Group Members](#) [Email Members](#) [Print Members](#)

- On the right hand side of the screen select “Remove All” And click “Save & Close”. This will reset your list and remove those you already printed. NOTE ENSURE YOU DO THIS SHORTLY AFTER PRODUCING YOUR PRINT FILE SO THAT THERE IS NO TIME FOR NEW MEMBERS TO JOIN AND BE MISSED IN YOUR REPORT.

Group Members [Help](#)

Search criteria

Available items

Organizat	Person	Type	Phone	Email	URL
-----------	--------	------	-------	-------	-----

Page 1 of 0 (0 items)

Click an item to add it.

Selected items

Person	Organizat	Type	Phone	Email	URL
Wheeler, Joe		Person	(905) 123-4567	joe.wheele	

Page 1 of 1 (1 items)

Click an item to remove it.

[Remove all](#)

[Save](#) [Save and Close](#) [Cancel](#)

5.4 Print One Off Cards & Letters

Sometimes a member contacts us for a replacement card or because they didn't receive theirs. To print a one off card & Letter follow the steps below

- In the membership Mailout file (see above) open the One off letter file
- Replace the fields in the letter with the members information. Try not to change spacing
- In the membership Mailout file (see above) open the One off card file
- Replace the xxx and "first last" text with the members information. Try not to change spacing
- Print the Letter & Card

6 Annual Renewal Process

At renewal time Membee is set to automatically process individual members. To do so the system will perform the following scheduled steps using what's called a scheduled automation. To view the automation schedule go to the admin link at the top of the membee screen and then click on active automations.

Welcome Membership | [Logout](#) | [Admin](#) | [My Requests](#) | [? Help](#)

Automations

[Active Automations](#)

Add, edit or delete and review specific tasks that are performed automatically based on a schedule you define.

[Automation History](#)

Review the history and details of automations performed

6.1 Scheduled Automations

Task	What it does	Email Templage	Date Scheduled
Club Renewal	Reminds club heads to renew their club by paying their club fee and resubmitting their roster list. Club will be sent an email with link to invoice to be paid. If invoice is paid before April 1 st club remains member and is not expired.	New Invoice - Club Renewal	February 1 st at 9am every year.
Individual Renewal	Reminds individuals to renew their membership by paying their fee. Member will be sent an email with link to invoice to be paid. If invoice is paid before April 1 st member remains active and is not expired.	New Invoice - individual Member Renewal	February 1 st at 9am every year.
Club Membership Cancellation	Process will run after the membership renewal deadline to expire any clubs who didn't pay their invoice issued above. When the club is expired their status is changed to Former Member club,	Cancel/Suspend Membership - Club Membership	April 5 th at 9am every year.

	all linked members expire as well. Set to run 4 days after deadline to provide small grace period.		
Individual Member Cancellation	Process will run after the membership renewal deadline to expire any members who didn't pay their invoice issued above. Status is changed to Expired Member. Website access is terminated. Set to run 4 days after deadline to provide small grace period.	Cancel/Suspend Membership - Individual Membership	April 5 th at 9am every year.





6.2 Customize message sent with each automation

Each automation listed above has a corresponding email that goes with it. You can customize the email content for each message. See table above for email template names.

- To customize the email go to Admin and select System Email Templates
- Select the template you want to edit. Edit content and click Save.

Welcome Membership | [Logout](#) | [Admin](#) | [My Requests](#) | [? Help](#)

Email

	System Email Templates	Modify system email templates that inform members of changes to their record.
	Set Default Email Templates	Set which email templates you want to use in specific situations and which email templates you want as the default choice when selecting an email template from a list.
	Bulk Email Integration Setup	Settings that allow you to export your data to third party bulk email distributors.
	Integrated Email Setup	Connect Member to your email server to enable Member's Integrated Email