Select the year you are renewing members for. Each batch is limited to one year selection. Start a new batch for another year. For new members, you will select the date on another screen.

Click here to use a hand-held scanner to add members to the batch by scanning the bar codes on the renewal notices.

Click here to access these same help screens online.

There are several ways to add members to the batch: use your mouse to drag and drop members from the left hand panel to the batch panel on the right, find records by name, enter ID numbers manually, or use a scanning wand.

The left hand side of the screen shows members of the chapter while the right hand panel indicates members you have added to the batch.

Click the ID number or the "person" icon to access more information about each member. This will take you to screens where you can make changes to addresses, phone numbers, or emails.

Here's your button to "add a new member"

Clicking the "pencil" takes you to a screen to change the type on a member's record as well as add family members, if applicable.

Click here to page through your chapter members—the bigger your chapter, the more pages in the list.

If a member gets added to the batch in error, simply use your mouse to drag and drop them back to the left panel.

Click here to create a report of all the members you have submitted in this batch. You can print and save a copy of the list.

As you add records to your batch, click "save" every so often to update your work. Finish your batch in one sitting or work on it over the course of multiple days.

You can preview the tally sheet at any time. Be sure to always hit "save" first so all your entries are updated.

When you are finished with your entries, click here to open the final submission screen where you will send the members on to National and, if you opt to, submit payment immediately via PayPal.

If you have made errors or just want to end the current batch without saving any entries, click here to delete the batch. You can then start a new batch.

Interface

Chapt

16   105   Member Name (optional)...   Fetch Members

Scan Invoices

Dubuque Chapter
Refine your search using id#, last name, first name, or last, first

Batch No: 858   Renewal Year: ● 2017 ○ 2016

New Member   MemberTypes   ℹ Help...

Dubuque - Chapter members

ID	All Members
00227677	Plein, Thomas 12/31/2016, RG, Active
12 00218193	Pregler, Steven 12/31/2015, RG, Expired
13 00227642	Puccio, Dalton 12/31/2016, RG, Active
15 00216929	Reagin, Ryan 12/31/2015, ST, Expired
16 00217162	Recker, Andrew 12/31/2015, RG, Expired
17 00227678	Reese, David 12/31/2016, RG, Active
18 00041643	Rehmke, Bruce 12/31/2015, RG, Expired
19 00211647	Reinert, Robert 12/31/2015, RG, Expired
20 00186644	Remakel, Michael 12/31/2016, RG, Active
21 0019396	Renier, Kent 12/31/2016, RG, Active
23 00218964	Rheingans, Stan 12/31/2015, RG, Expired

	ID	Renewal Batch Members ▲
1	00209150	Arnold, Dan 12/31/2016, RG, Active
2	00109318	Barry, Robert 12/31/2016, RG, Active
3	00227636	Glanz, Andrew S. 12/31/2016, RG, Active
4	00171103	Hansel, Jeffrey S. 12/31/2016, RG, Active
5	00193989	Powers, Rob 12/31/2016, RG, Active
6	00209152	Pusateri, Tony 12/31/2016, RG, Active
7	00078177	Renne, Robert 12/31/2016, RG, Active

☐ Indicates member already selected for batch
☐ Indicates member not valid for batch

⏮ ◀ Page 8 of 12 ▶ ⏭   ⟳   Displaying 176 - 200 of 277   Print Batch Members

Save Batch   Preview Tally Sheet   Submit Batch   Delete Batch

This is the screen that pops-up when you click the pencil "edit" icon on a member's record. This is the screen you will use to upgrade/downgrade membership types.
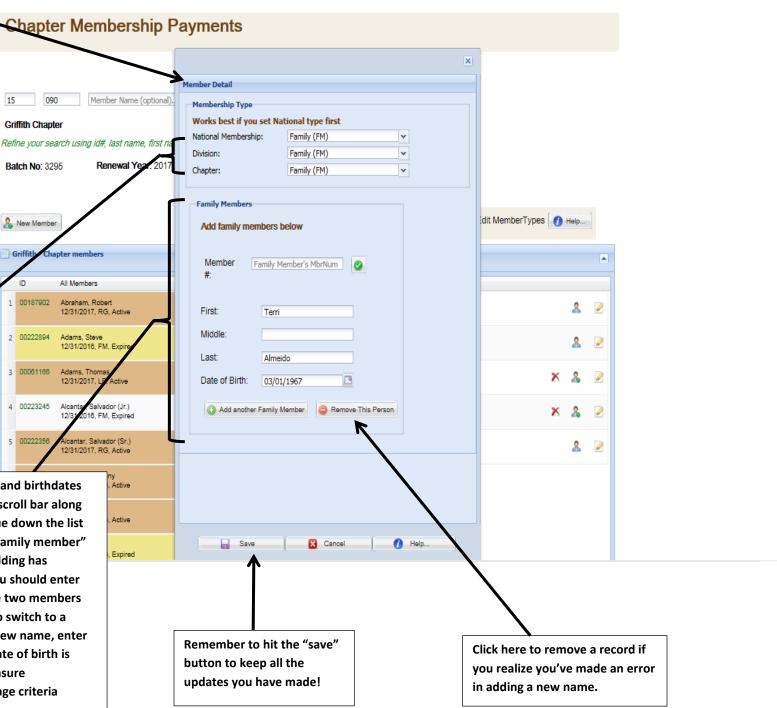
Edit membership types at EACH level as needed. For instance, if a family member is changing to an individual membership, select "individual" on each of the three lines. In this example, if the member is upgrading to Family Life at the National level, you will change the type on just that line.

Use this section to add names and birthdates for new family members. The scroll bar along the right allows you to continue down the list as you click the "add another family member" button. If the name you are adding has previously been a member, you should enter their ID number (i.e., you have two members who have married and want to switch to a family membership). If it is a new name, enter the name and date of birth. Date of birth is required for new records to ensure memberships are in line with age criteria detailed in the bylaws.

Remember to hit the "save" button to keep all the updates you have made!

Click here to remove a record if you realize you've made an error in adding a new name.

Chapter Membership Payments

15   090   Member Name (optional).

Griffith Chapter

Refine your search using id#, last name, first na

Batch No: 3295   Renewal Year: 2017

New Member

Edit MemberTypes   Help...

Griffith Chapter members

ID	All Members
1	00187902 Abraham, Robert 12/31/2017, RG, Active
2	00222894 Adams, Steve 12/31/2016, FM, Expired
3	00061166 Adams, Thomas 12/31/2017, LF, Active
4	00223245 Alcantar, Salvador (Jr.) 12/31/2016, FM, Expired
5	00222356 Alcantar, Salvador (Sr.) 12/31/2017, RG, Active

Member Detail

Membership Type

Works best if you set National type first

National Membership: Family (FM)

Division: Family (FM)

Chapter: Family (FM)

Family Members

Add family members below

Member #:   Family Member's MbrNum

First: Terri

Middle:

Last: Almeido

Date of Birth: 03/01/1967

Add another Family Member   Remove This Person

Save   Cancel   Help...

This is the first screen that pops up when you click "new member." You will enter the name, address, email, and phone information. Fields in red are required. Arrow symbols at the end of a field indicate there is a drop down list from which to select valid entries.

This is the second new member screen where you will enter the type of membership. Valid entries for your chapter appear in the drop down menus for each level. In most cases, a new member will have the same type across the board but this screen does give you the option to indicate something special if required.

At the appropriate times of the year, you will see options that allow you to indicate someone is paying for a full year, a half year, or a year and half. The expiration date will adjust accordingly and the system will keep track of the correct amount of money for you.

New Member Info

Prefix	Dr.
First Name	Stella
Last Name	Greentree
Suffix	
Email	stella@mymail.com
	◉ Home ○ Business
Country	United States
Street	234 Shady Lane
Street 2	
City	Gaithersburg
State	Maryland
Zip	22334
Phone	3105480150

Membership Details

Membership Type

Please set National Type First

National Membership:	Family (FM)
Division:	Family (FM)
Chapter:	Family (FM)
Date of Birth:	12/12/1957
Period:	○ 1/2 Year ◉ Full Year ○ 1 1/2 Years
	Membership Year ○ 2017 ◉ 2018
	Expiring: 12/31/2018

Family Members

Add family members below

Member #:	Family Member's MbrNum ✓
First:	Stan
Middle:	
Last:	Greentree
Date of Birth:	10/03/1956

⊕ Add another Family Member   ⊖ Remove This Person

💾 Next   ❌ Cancel

This field shows you the expiration date the person will have; pay close attention to the year. Half year members expire in the current year, 1½ year memberships expire the next year, and full year payments require you to indicate the year paid for.

If you enter a family membership type, you will see this section of the screen that allows you to indicate the name/birth date for each family member. Click the "add another family member" button to include additional names such as minor age children.

When you are finished adding a new member, simply click "next" to add the person to your batch and continue with your next entry.

If you add a family name in error, just click "remove this person" and it will clear the name. If you want to remove the entire new membership, click "cancel" instead.

This screen shows a batch with both new and renewing members. New members are easy to identify because of the "pending" status as well as the red "x" that lets you delete them from the batch if you have made an error.

Batch No: 2847   Renewal Year: 2017

New Member   Legend: 👤 View Member   Edit MemberTypes   ℹ️ Help...

Loudoun County - Chapter members

	ID	All Members	
1	00220713	Abbas, Sam 12/31/2017, RG, Active	👤
2	00196362	Abbas, Syed 12/31/2016, RG, Expired	👤
3	00201795	Abela, Andrew 12/31/2017, FM, Active	👤
4	00024689	Acker, Cary L. 12/31/2016, RG, Expired	👤
5	00198187	Ackert, Kevin 12/31/2017, RG, Active	👤
6	00220714	Adams, Thomas E. 12/31/2017, RG, Active	👤
7	00106334	Adcock, David J. 12/31/2017, RG, Active	👤
8	00213747	Aiello, Augustine A. (Jr.) 12/31/2017, RG, Active	👤
9	00196289	Albers, Edward 12/31/2017, RG, Active	👤
10	00199198	Aldrich, John P. 12/31/2016, RG, Expired	👤
11	00177996	Alexiou, James 12/31/2017, FM, Active	👤
12	00212323	Alison, David R. 12/31/2016, RG, Expired	👤

	ID	Batch Members	
1	00196362	Abbas, Syed 12/31/2016, RG, Expired	👤 ✏️
2	00024689	Acker, Cary L. 12/31/2016, RG, Expired	👤 ✏️
3	00198854	Beglis, Jim 12/31/2016, RG, Expired	👤 ✏️
4	00207674	Blackwell, Bruce E. 12/31/2016, FM, Expired	👤 ✏️
5	00235133	Greentree Stella 12/31/2017, FM, Pending	✖ 👤 ✏️
6	00235134	Robinson Meredith 12/31/2018, LX, Pending	✖ 👤 ✏️
7	00235135	Brewster Berlin 12/31/2018, RG, Pending	✖ 👤 ✏️

🟨 Indicates member already selected for batch

🟫 Indicates member not valid for batch

|◄   ◄   Page [1] of 41   ►   ►| 🔄   Displaying 1 - 25 of 1003   Print Batch Members

Save Batch   Preview Tally Sheet   Submit Batch   Delete Batch

This is the new tally sheet that creates itself automatically when you click the "submit batch" button—you will not need to make any calculations at all. Submitted members are automatically included in the correct categories based on each member's type at the national and division levels. This preview screen allows you to print a draft of the report or finish and submit your batch.

Chapter Member Payment Batch

Online Chapter Payment Tally Sheet
15 – 090   Griffith

BatchNo: 3297 | Username: Mary Rubin | Submitted on: 10/16/2017

Renewals

Nat Type	Nat Rate	Div Type	Div Rate	Count	Nat Dues	Div Dues	Total
RG	$50.00	RG	$8.00	2	$100.00	$16.00	$116.00
		TOTAL RG		2	$100.00	$16.00	$116.00
		RENEWAL TOTALS		2	$100.00	$16.00	$116.00

New Member – 1/2 Year

Nat Type	Nat Rate	Div Type	Div Rate	Count	Nat Dues	Div Dues	Total
FM	$37.50	FM	$6.00	1	$37.50	$6.00	$43.50
		TOTAL FM		1	$37.50	$6.00	$43.50
		NEW MEMBER – 1/2 YEAR TOTALS		1	$37.50	$6.00	$43.50

New Member – 1 1/2 Years

Nat Type	Nat Rate	Div Type	Div Rate	Count	Nat Dues	Div Dues	Total
ST	$37.50	ST	$9.00	1	$37.50	$9.00	$46.50
		TOTAL ST		1	$37.50	$9.00	$46.50
		NEW MEMBER – 1 1/2 YEARS TOTALS		1	$37.50	$9.00	$46.50
		GRAND TOTALS		4	$175.00	$31.00	$206.00

Print Report   Submit Batch   Submit By *PayPal*   ✕ Close Window   ⓘ Help...

Click here to open a pdf of the tally sheet that you can print as well as save for your own records.

Click here to finish and submit your batch. This is the option you should use if you will be mailing a check to pay for the submitted members. Member cards will not be mailed to you until your check for the correct amount is received.

This is the option you will select to finish and submit your batch if you will be paying electronically via PayPal. PayPal payments allow us to mail member cards back to you right away.

This is the total amount due for the members you have renewed or added as new. Submit payment in this amount either by sending a check in the mail or electronically via PayPal.