IHCUS Membership System
User Manual

Revision 3.0

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Table of Contents

Introduction

The IHCUS membership system is used to track membership status (process dues), Officers and Board members, Breed Experts, Breeder Referral, Committees, electronic notification receipt, fostering availability, and sending email notifications to the membership. It produces the membership roster as well as committee and public contact lists. It is vital to Club operations and the membership data must be accurate.

The focus of this manual is to provide reference information and instructions related to performing club-specific activities and tasks required to maintain membership records. An extensive online user manual is available and details how to use the software. Please consult it regarding specific "how-to" questions before contacting the webmaster.

Responsibilities

Everyone is responsible for the accuracy of the membership data. If you have updated contact information and the ability to update it, do so. If you do not have access to update the information, give it to someone who does.

It is important that member contact information to be verified and updated whenever possible. At minimum this should be done during the annual renewal period.

The Treasurer is responsible for manually posting all renewals by check and verifying that online payments were properly applied. If a copy of the membership renewal form is included with the annual dues payment, the Treasurer should also verify the member's contact information at that time.

The Software

aMember Pro is the software that powers the membership system. It was developed by aMember.com. The company also provides the online manual.

The software has been installed on the web server that hosts *ihcus.org*, along with the database used to store and manage the membership information. The database and the software work together and cannot separated.

The software was written to meet the needs of many businesses and organizations. It was not developed especially for our club. To that end you may find that some of the options works differently than you would prefer.

Customizing software often interferes with manufacturer updates and upgrades. Either customization is lost (and must be recoded), or upgrades simply fail.

Rather than customize the software, organizations should use it as designed. Procedures should be adapted to how data is processed. Studies have shown that organizations that do not adapt procedures to support purchased systems fail to realize the potential of those systems.

Licensing

- Only one (1) license is required.
- IHCUS owns one (1) license.
- The license allows unlimited member access over the internet.
- Individual user licenses are NOT required.
- There are NO annual renewal fees.
- However, future software updates may require an additional purchase.

Online User Manual

Content	URL
Main Page	http://manual.amember.com/Main_Page
How It Works	http://manual.amember.com/How_It_Works
Admin Control Panel	http://manual.amember.com/Main_Page#aMember_Admin_CP_Guide

System Access

 A separate administrator login is required to access the software's maintenance functions. This is not the same login that is displayed on the ihcus.org homepage.

Additionally, no link or reference to the admin login exists on the IHCUS website. This is by design. Publishing the location of this login would invite others to attempt to hack into the system.

The maintenance section of the membership system uses special admin accounts that cannot be linked or synchronized with the normal member accounts. Members who need admin access will receive a separate "admin" ID in addition to their IHCUS member ID.

System Logon

1. Open your web browser to the admin URL.

2. Enter a valid administrator login ID and password.

3. Click the **Login** button.

4. The main admin page (a.k.a Control Panel) will display.

The administrator URL is:

http://www.ihcus.org/amember/admin/

The Control Panel

The Control Panel (shown below) is displayed after login. It contains the various options used to update member information and system configuration.

Control Panel Menu Options

Menu options are displayed in the shaded area along the left side of the page. Simply click an option to access those features.

Member Lookup

A useful tool in the Control Panel is the "Lookup" button. This is used to find a member record.

1. Enter part of a name, login ID, or email address.
2. Click the **Lookup** button.

The search results will be displayed to the right. Click the member's Username to view/update their information.

Visibility of Control Panel Options

Depending upon the rights granted to your admin account, you may not see all of the options shown in the above image of the Control Panel.

Setup/Configuration Option

If you have access this option. Use it with caution. Only change settings where you are absolutely certain how the change will affect the system.

When in doubt, click the **Back** button. This will discard any accidental changes.

Additional Options

Additional options (shown below) will appear along the top of the screen, right of the Control Panel. These options will vary depending upon the option you select from the Control Panel list.

How The System Works

The software uses a **subscription model**, where people purchase a subscription to receive a product or service for a period of time (or term). When the subscription expires, they loose access to that product or service.

Each year members renew their membership and receive a new subscription. Subscriptions are not extended. Each subscription is a purchase and is related to a specific online payment or check received by the Club.

Active members, in good standing, have paid their dues. And the End Date for their membership (subscription) reflects that. Committee lists, mailing labels, and the membership roster all depend upon accurate Start and End subscription dates.

Integration
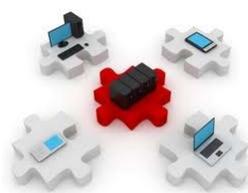
The membership system is integrated with our WordPress-based website and with the online discussion forum. Each system is based on PHP.

Software "plug-ins" link and manage member accounts between the systems. Each member must have a separate account.

IHCUS Members Yahoo Group

The membership system does NOT integrate with the Yahoo Groups. Access to the IHCUS Members Yahoo Group must be managed separately from the IHCUS membership system and website. This Group is also referred to as "the List".

Membership Types

Subscriptions are managed as "products". Each product (or type of subscription) has a duration, and a price. Like subscriptions, IHCUS memberships exist for a specified period of time and must be renewed (for a price) to continue. In other words, **membership** = **subscription** = **product.**

IHCUS Membership Types

The table below lists the basic memberships types that are required to support dues processing, website integration, and access to member-only content.

On-line pricing is higher to cover the PayPal fee for transactions.

Membership Type (product)	Duration	Price	Price (on-line)
Individual Membership	1 year	$ 40.00	$ 41.00
Household Membership for 2	1 year	$ 65.00	$ 66.75
Household Membership for 3	1 year	$ 90.00	$ 92.50
Household Membership for 4	1 year	$ 115.00	$ 118.50
Additional Household Member	*No auto-expire*	-	-
Honorary Membership	Lifetime	-	-
Local Club	1 year	$ 25.00	$ 25.80

Individual Membership

This is the standard type of IHCUS membership. It consists of only one member.

Household Memberships

Household Membership is available where two (2) or more members reside at the same residence. Dues are reduced because only one (1) copy of the *Third Eye* is mailed to the residence and this is the only reason that household memberships exist.

If a household with two (2) members wishes to receive two (2) copies of the *Third Eye*, the members should be set up as two (2) Individual Memberships.

- Household memberships consist of "primary" and "additional" members.
- Only one (1) member in the household is designated as the "primary" member.

Primary Household Member

- Is assigned the appropriate "household" membership (2-4).
- Is responsible for paying the annual dues for the entire household.

Other member(s) in the household are designated as *Additional Household Members*.

Important:
NEVER combine Household memberships into one (1) record!

Additional Household Members

These memberships:
- Are **never** set-up to automatically expire.
- Are manually expired when there is a non-renewal or suspension.
- Are NOT assigned a price (dues). Dues are paid by the "primary" member.

Lifetime Subscription Duration

Payment information may display certain membership types as "Lifetime". This is because there is no expiration date (or the expiration date is many years into the future). For example, setting the expiration date for *Additional Household Members* in the year 2037 minimizes the maintenance required during the annual renewal period.

Do NOT confuse these types of memberships with actual "Lifetime" memberships, such as Honorary.

Other Membership Types

Other membership types (subscriptions or products) are used to show when members served on a board or committee. They are also used to track fostering availability, receipt of electronic notification authorizations, etc. They are hidden from the renewal options available to members.   These are added to member records as subscription payments the same as membership renewals.

Adding Members

Member = User

Members are managed as Users in the system.

Procedure
1. Click Add User.
2. Enter the member's contact information.
3. Click **Save**.

Rules
- Keep Usernames in **lower** case
- Each member **MUST** have a **UNIQUE** Username
- Password – keep it simple (the member will change it)
- Each member **MUST** have a **UNIQUE** email address
- Email addresses may NOT be shared between members
- It is OK to leave Email blank – not all members have email
- Real Name = First + Last Name
- Locked (system use) – don't touch
- Member Since = Year joined IHCUS

To ensure all data is entered correctly, new members are not allowed to create their own membership record. This must be done by someone with administrator privileges, such as the Membership Chair, Secretary, or Treasurer.

Send a Welcome Email

Email the member their IHCUS username and password. Instruct them to change their password the first time they log in.

Suggestions for Usernames

Suggestion	Example	Source
Kennel Name	Arbeca	Arbeca Hounds
Email part before the @ symbol	Hollylulu	hollylulu@email.com
Last Name	Anderson	Anderson
Full Name	kurtanderson	Kurt Anderson
Last Name, First Initial	Andersonk	Kurt Anderson
Part of Last, First Initial, Middle Initial	Publicjq	John Q Public

Or, ask the member what would like their IHCUS username to be.

Editing Member Contact Information

Editing contact information uses the same screen as the Add User option.

Procedure

1. Browse or search users to locate the specific member.
2. Click Edit.
3. Change the appropriate contact information
4. Click **Save**.

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Users List (118)

Login	Name	Email	Payments	Status	Actions
ahram	Michelle Paulin	ahramkennels@aol.com	6 - $91.00	Active	Edit Delete
aifatc	Stacey Hayes	aifatc@sbcglobal.net	1 - $40.00	Active	Edit Delete
akan	Lori Coulson	akanibizans@aol.com	3 - $60.00	Active	Edit Delete
aklovr	Charlene Fortner	aklovr@gmail.com	3 - $61.00	Active	Edit Delete
alfheim	Stephanie McLeod	alfheim@tds.net	4 - $141.00	Active	Edit Delete
alfheim2	Avery McLeod		1 - $0.00	Active	Edit Delete
alisian	Alisa Barbour	alisianibizans@aol.com	6 - $90.00	Active	Edit Delete
amberlithe	Nan Little	nankilgore@amberlithe.com	10 - $91.00	Active	Edit Delete
apolda	Diane Small		3 - $90.00	Active	Edit Delete
arbeca	Teddy Burke	teddy_burke@yahoo.com	7 - $90.00	Active	Edit Delete
arden	Mel Clark	justmel@comcast.net	3 - $151.70	Active	Edit Delete
arden2	Matt Clark		1 - $0.00	Active	Edit Delete
arum	Luane Williams	arum@flash.net	9 - $90.00	Active	Edit Delete
atair	Christine Allen	atairacres@gmail.com	7 - $111.70	Active	Edit Delete
azahounds	Erica Kasper	ericakspr@yahoo.com	6 - $91.00	Active	Edit Delete

Filter: All members

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Membership Suspensions and Expulsions

Both suspensions and expulsions must be reflected in the system. These actions normally revoke member access to club resources/services for a specific time period (permanently for expelled members). Using the Suspended and Expelled membership types, along with updating "active" subscription end dates, accomplishes this.

Suspension of Membership

Important:

- *Do NOT simply change the suspended member's Username.*
- *Do NOT delete member records.*
- *All membership and payment data are historical and must be kept.*
- *Current membership payments should be expired (by changing the expiration date) and then a Suspended Membership product is added.*
- *When a suspension expires, manually restore the current membership expiration date.*

Suspension Procedure

1. Select and open the appropriate member record.
2. Click <u>User/Payments Subscriptions</u>.

3. Expire the current "active" membership product:

    a. Click <u>Edit</u> on the payment record.
    b. Change the Subscription End date to the beginning date of the suspension.
    c. Click **Save**.

4. Add a "Suspended Membership" product:

    a. Select the appropriate begin and end dates.
    b. Type "SUSPEND" in the Receipt # field.
    c. Click **Add**.

5. Upon the end of the suspension, reactivate the current "active" membership:

    a. Click <u>Edit</u>.
    b. Change the Subscription End date to the end date of the current dues year.
    c. Click **Save**.

After completing the above steps, suspended members attempting to log in will receive an accessed denied / subscription expired notice.

Suspensions will automatically expire. Do NOT delete the Suspended Membership subscription/payment record. This is historical membership status data and must be retained. The start/end dates provide history of the suspension.

Unfortunately, there is no automatic email to notify the Club when a suspension expires. We must rely on our memory, accurate notes, or some other process to remind us to reactivate the suspension.

Expulsion

Important:
- *Expulsions are Lifetime.*
- *The rules for expulsion are similar to suspension.*
- *Do NOT delete member records.*
- *All membership and payment data are historical and must be kept.*
- *Current membership payments are expired.*
- *An expelled membership product is added to the member's payment records.*

Expulsion Procedure

1. Select and open the appropriate member record.

2. Change the username to "xx_<username>", where <username> is the current username (eg: xx_smithjd).

3. Erase the Password.

4. Cut and Paste the email address into the (admin only) Comment box.

*Steps 2-3 above will prevent members from being able to log in or reset passwords.

5. Click **Save**.

6. Click User/Payments Subscriptions.

7. Expire the current "active" membership product :
    a. Click Edit on the member's current membership payment record.
    b. Change the Subscription End date to the expulsion date.
    c. Click **Save**.

8. Add an "Expelled Membership" product for the appropriate term:
    a. Change the Subscription Begin date to the expulsion date.
    b. Ensure the Subscription End date is set to 12/31/2037.
    c. Type "EXPEL" in the Receipt # field.
    d. Click **Add**.

If or when a member is readmitted to the club, expire the Expelled Member product (don't delete it) and update the member's contact information as appropriate. The member will be required to submit payment for their new membership.

Officers and Committees

Subscriptions are used to indicate who are Officers, Board and Committee members.

1. Select and edit the appropriate member record.
2. Click User/Payments Subscriptions.
3. Click the appropriate office, committee, or chair item in the product list.
4. Set the appropriate Begin and End dates.
5. Note OFFICER, BOARD, or COMMITTEE in the Receipt # field.
6. Click **Add**.

Be sure to expire those members no longer serving on a committee or the board before the end of their term.

Breeder Referral Listing

The Breeder Referral Listing is a benefit offered to IHCUS members. Members in good standing with planned litters or available puppies can be listed.

Adding a member to the listing
1. Select and edit the appropriate member record.
2. Click User/Payments Subscriptions.
3. Select "Breeder Referral Listing" item in the product list.
4. The expiration date will automatically set to expire in one (1) year.
5. Note "LISTING" in the Receipt # field.
6. Click **Add**.

CAUTION: There are also similar products called "Breeder Referral" and "Breeder Referral Chair". Do NOT select either of these. They are for members who serve on that committee. The "Breeder Referral List" is listed near the end of the product list.

Hiding contact information
Members may indicate that they wish to hide portions of their contact information (address, phone, email, or website). There are several Yes/No fields on the member profile page that will suppress this information in the Breeder Referral Listing.

1. Select and edit the appropriate member record.
2. Open the member's Profile page.
3. Scroll down to the "Show Address/phone/email/web" fields.
4. Click either "Yes" to show or "No" to hide (Yes is the default).
5. Save the changes.

   *Members can also update these show/hide settings.

A custom web page displays the Breeder Referral Listing. Only "active" members with a current "Breeder Referral Listing" subscription are shown.

Sending Email

The system can send email to either individual or groups of members. Replies will be sent to the email defined in the system configuration.

Set the Return Address

This will determine where replies to your email are sent.

1.　Click the **Setup/Configuration** option in the left menu.
2.　Click the **E-Mail** option displayed at the top of the page.

aMember Pro Configuration : Global
main configuration directives

3.　Update the **Outgoing Email Address**.
4.　Click the **Save** button (at the bottom of the page).

Email an Individual Member

1.　Select a member record.
2.　Click Edit.
3.　Click the Actions option along the top of the Edit User page.
4.　The User Actions page will be displayed.
5.　Go to the Email Customer section of the page.
6.　Enter a subject.
7.　Enter a message.
8.　Click **Send**.

Email a Group of Members

- **Browse Users**
  - Search Users
  - Add User
  - Email Users
  - Import / Export
  - Backup / Restore
  - Rebuild DB

1. Click on the **Email Users** option in the Control Panel.
2. The Email To Users screen will display (shown below).

This is where you will select member groups and compose the email.

Which Groups to Use

The groups are selected in the "Select a category" section in the *Email To Users* screen.

Select the following categories for all active members:

- Individual Membership
- Household Membership for 2
- Household Membership for 3
- Household Membership for 4
- Additional Household Member
- Honorary Member
- Local Club

Official Electronic Notifications

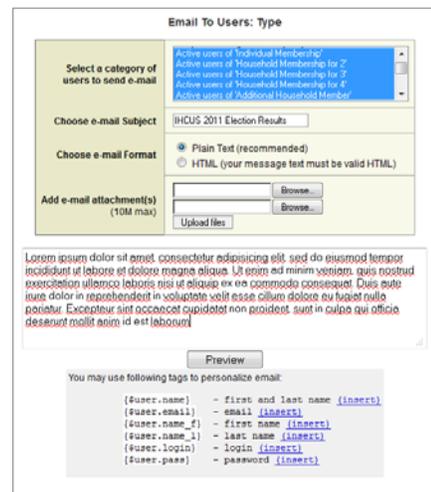Select the following category for notifications that require this authorization from members:

- Electronic Notification Authorization

Members Without Email

Members without an email will not receive an email.

Composing and Sending

1. Select **categories** based on membership type.
2. Change the **e**-mail **Subject** as appropriate.
3. Set format to Plain Text (do not use HTML).
4. Add attachments (optional).
5. **Type your message** into the message box.
6. Click **Preview**.
7. Review your message.
8. Click **Send**, or **Back** to make further changes.

You may also compose your message in a word processing program, check spelling and grammar, then copy the text into the message box. Any formatting will be lost. Only the text will copy.

The email "tags" (shown above) allow you to personalize the message. For example, instead of typing "Hello Members,", you may wish to include each member's first name. "Hello { $user.name_f }," will accomplish this. Don't type the quotes though.

Processing Dues

When dues are paid via PayPal, the system is automatically updated. However, when a member pays with a check, a manual entry must be made.

Subscription Period

The subscription period in the system is from January 31 through January 31. This provides an automatic grace period for late payments. Members could be abruptly locked out of the system on January 1 and unable to renew online.

Important:
- All regular membership payment entries should start and end on January 31.
- The only exception should be for new members who join mid-year.
- Substitute January 31 for any examples of system forms that show December 31.

Entering Payments

Payment Entries for Checks
1. Locate the member record and click edit.
2. Click User/Payments Subscriptions.
3. Select the appropriate membership type.
4. Start Date = December 31 (current year)
5. End Date = December 31 (next year)
6. Enter the Check # and date (eg: CK 123 (10-1-11)
7. Enter the Check amount
8. Click **Add**.

If you have a copy of the renewal form, verify the member's contact information and update it to match the information on the form.

Do NOT simple change the end date to the next year. Yes, this will work. But you will lose the ability to keep records of the actual payment made. These are as much payment records as they are membership status. If audited, they should tie back to the financials.

Verifying Online Payments

All online dues renewal payments should be visually verified against the subscription payments listed in the system.

- Members can (but shouldn't) bypass the renewal options on the IHCUS website. This is done by making a direct online payment to <u>treasurer@ihcus.org</u>. There is nothing to prevent this. Manually create entries following the steps used for check payments.

- Sometimes a member may select the wrong membership type. Edit and correct these as appropriate.

- Contact members if to verify suspicious looking payments.