



# Association Management Software

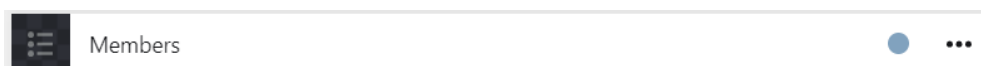
## MANAGING MEMBERS

In the **Administration section** click on “**Members**” (see the image below)

Administration		⊕ Add
	Login	● ...
	Membertypes	● ...
	Mollie payonline	⊘ ...
	Mollie success/cancel	⊘ ...
	My account	● ...
	Positions	● ...
	Members	● ...
	Invoices per year	● ...

### 1) Step 1: Add a member

In the administration panel click on “Members”



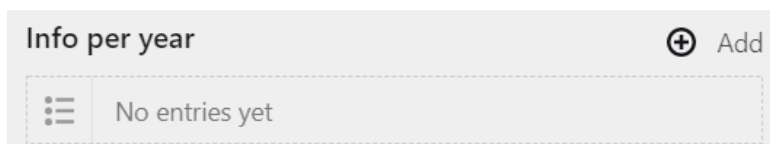
Click on the **Add** button

In the popup screen complete the name of the person and click on “create draft”

You need to complete at least the following details:

- Name
- First name
- Email (private)

Now add the type of membership for the current year. Click on the Add like shown below and





- Enter the current year
- Select a position in the board if applicable
- Select the type of membership
- Click on the Add button

You will see that an orange/brown bar appears at the bottom. It's time to save the changes.

After saving you can return to the overview of the members by clicking on "Members" in black bar on the top

## 2) Step 2: Invite the member

Now that the member is created you can invite him to complete his profile + pay his membership online (if applicable) and download his invoice.

Option 1:

- Go to the members
- Click on **Invite members** and select the name of the new member and click on send

Option 2:

- In the member profile click on "Personal link to member" and give a temporary password. (Note you need to be logged out to do so).

Send in a separate email to the password to the member.

Note: You can do Step 3 "Create the membership invoice" (see below) before Step 2 "Invite the member". If you do this the member will be able to pay his membership online when he logs in for the first time to complete his profile.

*To edit the content of the invitation mail, refer to the chapter "Standard emails".*

## 3) Step 3: Create the membership invoice

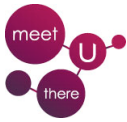
If the new member has a membership fee to pay you need to create his proforma invoice.

In the **Administration section** click on "**Invoices per year**" and then click on the current year and follow these steps:

1. Click on the "Import members" button
2. Select the name of the new member and click on Ok
3. Click on the "Mail members" button
4. Select the Mailtemplate "Proforma" and then click on Ok. Note that this will send the proforma to all members that did not receive their proforma yet.

Important remarks:

- In the beginning of a year, when you allocated the new membership type to all the existing members you can select "ALL" in step 2 instead of a specific name.



- If you already created the proformas for the existing members and you created some new members you can also select 'ALL' in step 2. The system only generates proformas for members with a fee to pay where no proforma was issued before.

*To edit the content of the mails "Proforma, Invoice & Reminder", refer to the chapter "Standard emails".*



## MAILINGS TO MEMBERS

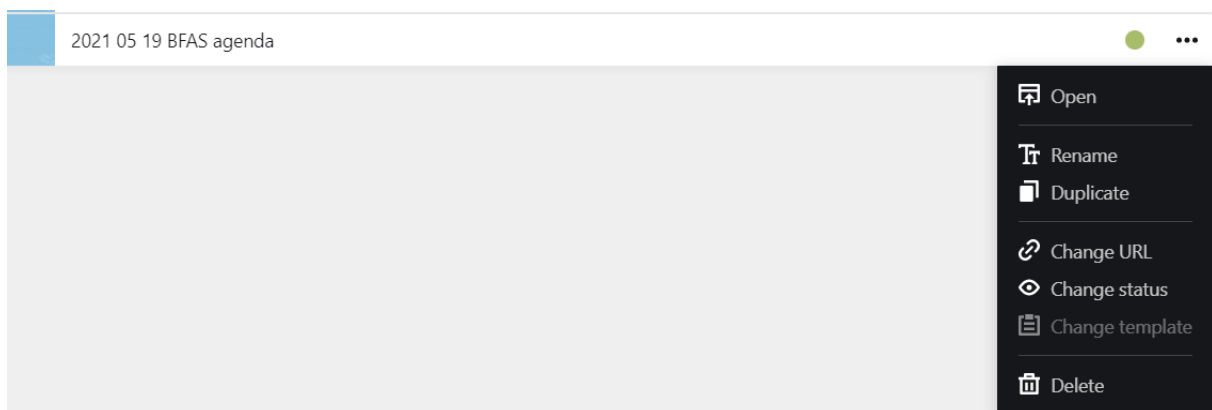
All actions need to be performed from the Mail Dashboard

Mail		⊕ Add
	Mailcontent	● ...
	Mailing	● ...
	Mailtemplates	○ ...

### 1) Create a Mailtemplate

Click on *Mailtemplates*

Click on the 3 dots of an existing mailtemplate and select *Duplicate*



Name the duplicate by starting with the date of the meeting in the format YYYY MM DD followed by the title of the mailing. Always set copy files to **on**.

URL appendix \*

Copy files \*

 on

Cancel  Duplicate

Go with your mouse on the right of the title and a pen will appear. Click on the pen to change the title of the template

Now you can change the title and content of the mail template.

To have some parts in Bold or Italic select the text and use the toolbar. To add a link select the text and use the button.



To add an image or a pdf file just drag and drop in the text.

Before you can send the email you need to **change the status** from **Draft** to **Public**.

## 2) Sending the email

Go Back to the main dashboard and click on the Mailing bar



When you click on **Mail contacten** you have a popup screen.

- Select the Mailtemplate you want to send
- Select the current year
- Select the Membertype. Special for testing and keep black to send to all membetypes
- Select Paid of not yet paid if needed
- Send to everyone = on will also send to the persons that didn't select to option "receive news mails"

A message will appear with the number of people to who the email was sent. If there is an error on some emails the email addresses will be shown

A screenshot of a web application popup window for configuring an email send. The title is 'Testmodus on verstuurt geen emails'. It contains several controls: a toggle switch for 'Testmodus on verstuurt geen emails' (currently off), a dropdown menu for 'Mailtemplate' (selected '2021 06 26 BFAS meeting'), a dropdown menu for 'Year' (selected '2021'), a dropdown menu for 'Membertype' (selected 'Special'), a dropdown menu for 'Paid' (selected '-'), and another toggle switch for 'Send to everyone' (currently off). At the bottom, there are 'Cancel' and 'Ok' buttons.