

Latest Innovations for Online Join and Renew with iMIS

Presented by:

Association Technology Solutions



Association Technology Solutions



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 & 2016 Authorized iMIS Solution Provider (AiSP) of the Year

Hosted by



Presenter:

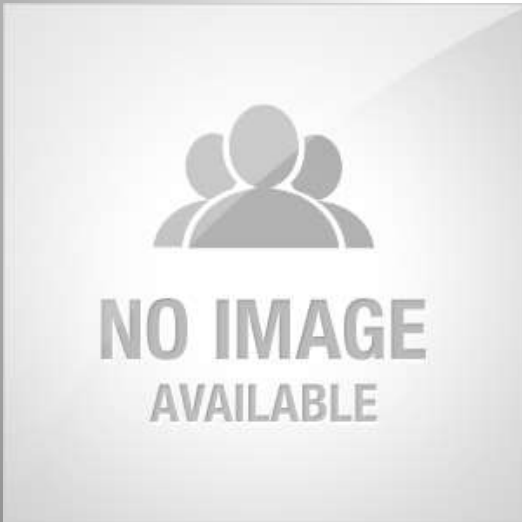
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Goals of the Join Process

- Get information about the person/Company
- If required, go through a review process
- Collect the money
- Welcome the person
- Start the member journey



Goals of the Renew Process

- Make it easy
- Ask them to review their contact information
- Let them change their membership type
- Upsell additional chapters, sections
- Ask for a donation
- Collect the money
- Continue the member journey



People who Join

- People who are not in iMIS
- People who are already in iMIS
- People who used to be members
- Companies who are not in iMIS
- Companies who are already in iMIS
- Companies who used to be members



Join Process

Create/Edit
Account

Ask Join specific
questions

Ecommerce

How can we do this in RiSE?

- Make a landing page
- Ask the person to login or create an account
 - You can have a different create an account for each member type
- Use the Content Collection Organizer to walk the person through the process
- After completion send them to the store to make the purchase

What data do you collect

- In the standard profile, collect information that you want to let people update and change regularly
- The join should, in general, only ask for items that are asked one time and relevant to calculating their dues or are a minimum requirement for joining (e.g., upload a transcript)

Academy of General Dentistry Landing Page

The screenshot shows the Academy of General Dentistry website. At the top left is the logo with the tagline "Your voice for excellence through education and advocacy". A search bar is at the top right. A navigation bar contains links for MEMBERSHIP, EDUCATION & EVENTS, ADVOCACY, PUBLICATIONS & MEDIA, and PATIENT RESOURCES. The "Membership" section is highlighted in blue on the left sidebar, listing options like "Join the AGD", "Membership Categories", "Membership FAQs", "Renew My Membership", "My Profile", "Member Benefits", "Marketplace & Careers", "Member Connections", "Celebrate Members", "Student Resources", "AGD Products", "Contact Us", and "Log In". The main content area features a banner image of three dentists and a "JOIN" button. Below the banner, the text reads "AGD Home » Membership » Join the AGD". The main heading is "Join the AGD". A thank-you message follows, directing users to the membership categories page. Three membership application options are listed: "U.S. Dentist Membership Application", "Canadian Student and Dentist Membership Application", and "International Dentist Membership Application". Each option includes a description of eligible professionals and links to "join online" or "download a paper application". Red arrows point to the "join online" links in each of these three sections.

Academy of General Dentistry™
Your voice for excellence through education and advocacy

Site Search

MEMBERSHIP | EDUCATION & EVENTS | ADVOCACY | PUBLICATIONS & MEDIA | PATIENT RESOURCES

Membership

- Join the AGD
- Membership Categories
- Membership FAQs
- Renew My Membership
- My Profile
- Member Benefits
- Marketplace & Careers
- Member Connections
- Celebrate Members
- Student Resources
- AGD Products
- Contact Us
- Log In

AGD Home » Membership » [Join the AGD](#)

Join the AGD

Thank you for your interest in AGD membership! Please select the membership category below that applies to you. For more information, visit our [membership categories](#) page.

U.S. Dentist Membership Application
General dentists, specialty dentists, [dental residents](#) who currently practice dentistry in the U.S. can [join online](#) or [download a paper application](#).

Canadian Student and Dentist Membership Application
General dentists, specialty dentists, [dental residents](#) who currently practice dentistry in Canada can [join online](#) or [download a paper application](#).

International Dentist Membership Application
General dentists, specialty dentists, and dental residents who currently practice dentistry in a country other than the U.S. or Canada can [join online](#) or [download a paper application](#). Visit our [International Membership page](#) to learn more.

U.S. and International Student Membership Application

Regular Member Join

Academy of General Dentistry® through education and advocacy

Site Search

MEMBERSHIP | EDUCATION & EVENTS | ADVOCACY | PUBLICATIONS & MEDIA | PATIENT RESOURCES

Membership

- Join the AGD
- Renew My Membership
- My Profile
- Member Benefits
- Member Connections
- Celebrate Members
- Student Resources
- AGD Products
- Contact Us
- Log in

Join as an Active Member

Sign In/Create Account | Contact Address | Personal Information | Education/Practice Profile

Welcome to the Academy of General Dentistry!

Please choose an option below to continue:

- If you already have an AGD account, please sign in to become a member
- If you have already signed in, please select **"Next"** to continue
- If you don't already have an AGD account, please select **"Create a new account"** to get started
- If your need to have an email sent to you which will remind you of your username, or allow you to reset your password, select **"Forgot my username or my password"**.

Sign In


Username

Password

Remember me

[Forgot my password or my username](#)

[Create a new account](#)



After Signing In

The screenshot shows the website for the Academy of General Dentistry. The header includes the logo and the tagline "Your voice for excellence through education and advocacy". Navigation links for LCC, Governance, AGD Foundation, and About Us are present. A search bar is located in the top right. The main navigation bar contains links for MEMBERSHIP, EDUCATION & EVENTS, ADVOCACY, PUBLICATIONS & MEDIA, and PATIENT RESOURCES. The "Membership" section is active, with a sidebar listing options like "Join the AGD", "Renew My Membership", "My Profile", "Member Benefits", "Member Connections", "Celebrate Members", "Student Resources", "AGD Products", "Contact Us", and "Log In". The main content area is titled "Join as an Active Member" and features a progress bar with steps: "Sign In/Create Account", "Contact Address", "Personal Information", and "Education/Practice Profile". A "Welcome to the Academy of General Dentistry!" message is followed by instructions to choose an option to continue. A list of options includes signing in for existing members, selecting "Next" for those already signed in, creating a new account for new members, and using "Forgot my username or my password" for email reminders. A red arrow points to the "Next" button.

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Welcome to the AGDI

Site Search

MEMBERSHIP | EDUCATION & EVENTS | ADVOCACY | PUBLICATIONS & MEDIA | PATIENT RESOURCES

Membership

- Join the AGD
- Renew My Membership
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- Member Benefits
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- AGD Products
- Contact Us
- Log In

Join as an Active Member

Sign In/Create Account | Contact Address | Personal Information | Education/Practice Profile

Welcome to the Academy of General Dentistry!

Please choose an option below to continue:

- If you already have an AGD account, please sign in to become a member
- If you have already signed in, please select **"Next"** to continue
- If you don't already have an AGD account, please select **"Create a new account"** to get started
- If your need to have an email sent to you which will remind you of your username, or allow you to reset your password, select **"Forgot my username or my password"**.

Address Edit Tab

The screenshot displays the AGD website's membership management interface. At the top, the AGD logo and tagline "Your voice for excellence through education and advocacy" are visible. Navigation links include LCC, Governance, AGD Foundation, and About Us. A search bar is present with the text "Site Search" and a "Go" button. The main navigation menu includes MEMBERSHIP, EDUCATION & EVENTS, ADVOCACY, PUBLICATIONS & MEDIA, and PATIENT RESOURCES. The "Membership" section is highlighted, and a sidebar menu lists options like "Join the AGD", "Renew My Membership", "My Profile", "Member Benefits", "Member Connections", "Celebrate Members", "Student Resources", "AGD Products", "Contact Us", and "Log In". The main content area is titled "Join as an Active Member" and features four tabs: "Sign In/Create Account", "Contact Address", "Personal Information", and "Foundation/Practice Profile". The "Contact Address" tab is active, showing "Contact Information" instructions and a form for "Office Address". The form contains the address "4704 Harlan St, Denver, CO 80212, UNITED STATES" and the email "michter@atsol.org". A red arrow points to the "Next" button at the bottom right of the form area.

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LCC | Governance | AGD Foundation | About Us |

Welcome to the AGDI

Site Search:

MEMBERSHIP | EDUCATION & EVENTS | ADVOCACY | PUBLICATIONS & MEDIA | PATIENT RESOURCES

Membership

- Join the AGD
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- Member Benefits
- Member Connections
- Celebrate Members
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- AGD Products
- Contact Us
- Log In

Join as an Active Member

Sign In/Create Account | **Contact Address** | Personal Information | Foundation/Practice Profile

Contact Information

Please verify your office address and update if necessary. This will be your preferred mailing address.

If you would like to provide a different preferred mailing address, simply click the **+** symbol to add the new address and indicate your preferred mailing preference.

Office Address

michter@atsol.org

Please click next to continue.

Personal Information Tab

The screenshot shows the 'Personal Information' tab of the 'Join as an Active Member' form on the AGD website. The page header includes the AGD logo, the tagline 'Your voice for excellence through education and advocacy', and navigation links for LCC, Governance, AGD Foundation, and About Us. A search bar is also present. The main navigation bar highlights 'MEMBERSHIP', 'EDUCATION & EVENTS', 'ADVOCACY', 'PUBLICATIONS & MEDIA', and 'PATIENT RESOURCES'. The 'Membership' section is active, with a sidebar menu listing options like 'Join the AGD', 'Renew My Membership', 'My Profile', 'Member Benefits', 'Member Connections', 'Celebrate Members', 'Student Resources', 'AGD Products', 'Contact Us', and 'Log In'. The 'Personal Information' tab is selected, showing fields for 'Date of Birth' (2/18/1962), 'Gender' (Male), and 'Ethnicity' (checkboxes for African American or Black, American Indian or Alaskan Native, Asian or Pacific Islander, East Indian, and Hispanic or Latino). Below this is a section for 'Are you a member of other associations?' with checkboxes for various dental organizations and an 'Other:' text input field.

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Welcome to the AGDI

Site Search

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- AGD Products
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- Log In

Join as an Active Member

Sign In/Create Account | Contact Address | **Personal Information** | Education/Practice Profile

Please tell us about yourself.

• Date of Birth

• Gender

Ethnicity

- African American or Black
- American Indian or Alaskan Native
- Asian or Pacific Islander
- East Indian
- Hispanic or Latino

Are you a member of other associations?

- American Association of Public Health Dentistry
- American Academy of Cosmetic Dentistry
- American Academy of Pediatric Dentistry
- American Academy of Implant Dentistry
- American Dental Association
- American Dental Education Association
- Hispanic Dental Association
- National Dental Association

Other:

Personal Information Tab

American Dental Association
 American Dental Education Association
 Hispanic Dental Association
 National Dental Association

Other:

Would you like to be in the Mentor Program?

I would like to find a mentor
 I would like to be a mentor

Would you like to receive special offers?

Check here if you'd like to receive special offers and promotions directly from the AGD Member Savings & Offers providers and Corporate Sponsors.

Were you referred by an AGD member?

Name of AGD member you were referred by:


City of AGD member you were referred by:

State of AGD member you were referred by:
(None)

Did you receive a promotional code?

If you received a promotional code, please enter it here:

Please click next to continue.



Education/Practice Info Tab

The screenshot shows the AGD website's 'Education/Practice Profile' form. The page header includes the AGD logo, the tagline 'Your voice for excellence through education and advocacy', and navigation links for LCC, Governance, AGD Foundation, and About Us. A search bar is also present. The main navigation bar highlights 'MEMBERSHIP', 'EDUCATION & EVENTS', 'ADVOCACY', 'PUBLICATIONS & MEDIA', and 'PATIENT RESOURCES'. The 'Membership' section is active, with a sidebar menu listing options like 'Join the AGD', 'Renew My Membership', 'My Profile', 'Member Benefits', 'Member Connections', 'Celebrate Members', 'Student Resources', 'AGD Products', 'Contact Us', and 'Log In'. The 'Join as an Active Member' section has a progress bar with four steps: 'Sign In/Create Account', 'Contact Address', 'Personal Information', and 'Education/Practice Profile'. The form asks for dental school information and license details. Below that, it asks about practice type and federal employment.

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Welcome to the AGD!

Site Search

MEMBERSHIP | EDUCATION & EVENTS | ADVOCACY | PUBLICATIONS & MEDIA | PATIENT RESOURCES

Membership

- Join the AGD
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- AGD Products
- Contact Us
- Log In

Join as an Active Member

Sign In/Create Account | Contact Address | Personal Information | **Education/Practice Profile**

Where did you attend dental school? Also, please provide your license number.

• Dental School:

• Degree:

• Date Graduated:

• License No.:

• License State:

License Country:

Date License Received:

Tell us about your practice.

Private Practice

Associateship

Group Practice

Faculty member at a CODA approved dental school?

If yes, choose faculty status.

Are you employed full time with a branch of the Federal Services?

If yes, select your Federal

Education/Practice Info Tab

Remember Us
Log In

• License State: Colorado
License Country: (None)
Date License Received: []

Tell us about your practice.

Private Practice
 Associateship
 Group Practice
 Faculty member at a CODA approved dental school?

If yes, choose faculty status. (None)

Are you employed full time with a branch of the Federal Services?
If yes, select your Federal Services Branch. (None)

Please select a Specialty, if any

- Dental Public Health
- Endodontics
- Oral and Maxillofacial Pathology
- Oral and Maxillofacial Radiology
- Oral and Maxillofacial Surgery
- Orthodontics

Are you currently in a GPR/AEGD program or have you completed a GPR/AEGD program in the past?

Current Residency Institution: (None)
Residency start date: []
Residency end date: []

Previous Residency Institution: (None)
Residency start date: []
Residency end date: []

Previous Finish

What happens after you have collected profile information

- Move to Ecommerce to collect optional items and payment

Typical RiSE Join Page

Regular Membership Fees

Membership Fees

Item	Unit Price	Quantity	Amount
<input checked="" type="checkbox"/> Regular Member Fees	200.00	1	200.00

Chapter Membership Fees

Item	Unit Price	Quantity	Amount
<input type="checkbox"/> East Chapter	47.00	0	0.00
<input type="checkbox"/> North Chapter	45.00	0	0.00
<input type="checkbox"/> South Chapter	43.00	0	0.00
<input type="checkbox"/> West Chapter	45.00	0	0.00

Sections and Specialty Groups

Item	Unit Price	Quantity	Amount
<input type="checkbox"/> Finance Section	20.00	0	0.00
<input type="checkbox"/> Marketing Section	20.00	0	0.00
<input type="checkbox"/> Technology Section	20.00	0	0.00

Journals and Other Subscriptions

Item	Unit Price	Quantity	Amount
<input type="checkbox"/> Industry Insider Magazine	34.95	0	0.00
<input type="checkbox"/> Journal of Professional Leadership	34.95	0	0.00

Voluntary Contributions

Item	Unit Price	Quantity	Amount
<input checked="" type="checkbox"/> PAC Contribution	N/A	1	20.00
<input type="checkbox"/> Scholarship Fund Contribution	N/A	0	0.00

Subtotal 220.00

Add to Cart

RiSE Cart

- When you add a join to the cart, existing items in the cart priced at non-member rate do NOT change to member pricing
- All items are rolled into one line item
- You cannot use dues coupons
- You cannot pay someone else's dues unless you are a company admin

RiSE Cart Page

The screenshot displays the RiSE Cart Page. At the top, there is a navigation bar with the iMIS logo, a 'Sign Out' button, social media icons for Facebook, Twitter, and LinkedIn, a 'Keyword Search' input field, and a language dropdown set to 'English'. Below the navigation bar are menu items: ABOUT US, MEMBERSHIP, EVENTS, SHOP, GIVE NOW, CERTIFICATION, and COMMUNITIES. A 'Continue Shopping' button is located on the right side of the page.

The main content area is titled 'Shopping Cart'. Underneath, there is a section for 'Items' which contains a table with the following data:

Item	Quantity	Price	Total	
Regular Membership Fees	1	220.00	220.00	Remove

A red arrow points to the 'Regular Membership Fees' link in the table. To the right of the table is an 'Update' button.

Below the items table is a 'Cart Charges' section with the following details:

Item Total	220.00
Shipping	0.00
Handling	0.00
TRANSACTION GRAND TOTAL	220.00

Below the cart charges is a 'Promotional Code' field with an 'Apply' button. A red arrow points to this field.

At the bottom of the page, there is a 'Payment Details' section with a 'Pay with PayPal' option.

ATS Online Marketplace Dues Page

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Site Search

MEMBERSHIP EDUCATION & EVENTS ADVOCACY PUBLICATIONS & MEDIA PATIENT RESOURCES

STORE HOME

SEARCH STORE

Dues

0 Item(s) (\$0.00)

Randy Richter
Current Member Type: Web Sign-Up

Your AGD dues amount is as follows:

- Membership Dues \$154.00

NEXT

*If the total dues amount is not displaying correctly, please contact the AGD Membership Services Center at 888.243.3368 or membership@agd.org. We apologize for the inconvenience.

DUES

EVENTS

PRODUCT CATEGORIES

KEYWORDS

16 17 18 19 Academy AGD American Associates Association Center Certificate College Dental Dentistry Edition Guide to

ATS Online Marketplace Dues Page

The screenshot shows the 'Dues' page for a member named Randy Richter. The page header includes the Academy of General Dentistry logo and the tagline 'Your voice for excellence through education and advocacy'. A navigation bar contains links for MEMBERSHIP, EDUCATION & EVENTS, ADVOCACY, PUBLICATIONS & MEDIA, and PATIENT RESOURCES. Below the navigation bar, there are buttons for 'STORE HOME' and 'VIEW PREVIOUS ORDERS'. A search bar is present with a 'SEARCH STORE' button. On the right side, there are buttons for 'VIEW CART' and 'PAY NOW'. The main content area displays the member's name, 'Randy Richter', and their current member type, 'Web Sign-Up'. It states, 'Your Constituent Dues amount is as follows:' and shows a checked box for 'Colorado AGD \$40.00'. There are 'BACK' and 'NEXT' buttons. A disclaimer reads: '*If the total dues amount is not displaying correctly, please contact the AGD Membership Services Center at 888.243.3368 or membership@agd.org. We apologize for the inconvenience.' On the right side, there are several sections: '0 Item(s) (\$0.00)' with a '+ Show' link; 'DUES' with a 'Renew' link; 'EVENTS' with an 'All Events' link; 'PRODUCT CATEGORIES'; and 'KEYWORDS' with a list of terms including '16', '17', '18', '19', 'Academy', 'AGD', 'American', 'Associates', 'Association', 'Center', 'Certificate', 'College', 'Dental', 'Dentistry', 'Edition', 'Guide', and 'to'.

ATS Online Marketplace Dues Page

[STORE HOME](#) [VIEW PREVIOUS ORDERS](#)

SEARCH STORE [SEARCH STORE](#) [VIEW CART](#) [PAY NOW](#)

Dues

0 item(s) (\$0.00) [+ Show](#)

DUES
[Renew](#)

EVENTS
[All Events](#)

PRODUCT CATEGORIES

KEYWORDS
16 17 18 19 Academy AGD American
Associates Association Center Certificate
College Dental Dentistry
Edition Group Guide Inc
Institute LLC Maryland Medical
Membership Online Pacific Sch
School STUDY Univ

Randy Richter
Current Member Type: Web Sign-Up

Please consider a donation to the following

Description	Amount
Foundation Donations I wish to contribute to the AGD Foundation's efforts to improve the oral health of the public and to support the efforts of the general dentist through educational and charitable initiatives. Note: This may be tax deductible in the U.S. Consult your tax advisor.	\$ 0.00
Advocacy Fund Donations I wish to strengthen the voice of general dentistry at the local and national levels by contributing to the Academy of General Dentistry (AGD) Advocacy Fund.	\$ 0.00

[BACK](#) [NEXT](#)

***If the total dues amount is not displaying correctly, please contact the AGD Membership Services Center at 888.243.3368 or membership@agd.org. We apologize for the inconvenience.**

ATS Online Marketplace Dues Summary

Academy of General Dentistry™
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MEMBERSHIP | EDUCATION & EVENTS | ADVOCACY | PUBLICATIONS & MEDIA | PATIENT RESOURCES

STORE HOME | VIEW PREVIOUS ORDERS

SEARCH STORE

VIEW CART | PAY NOW

Dues

Randy Richter
Current Member Type: Web Sign-Up

Description	Amount
Membership Dues through 12/31/2017	\$154.00
Colorado AGD	\$40.00
Total:	\$194.00

*If the total dues amount is not displaying correctly, please contact the AGD Membership Services Center at 888.243.3368 or membership@agd.org. We apologize for the inconvenience.

BACK | ADD TO CART

0 Item(s) (\$0.00) + Show

DUES
[Renew](#)

EVENTS
[All Events](#)

PRODUCT CATEGORIES

KEYWORDS
16 17 18 19 Academy AGD American Associates Association Center Certificate College Dental Dentistry Edition Guide

ATS Online Marketplace Cart

- When you add a join to the cart, existing items in the cart priced at non-member rate DO change to member pricing. If you remove the dues from the cart it goes back to non-member pricing
- You can control what gets rolled up (Kitting)
- Supports dues coupons
- Can pay your dues, anyone else's dues, or company dues based on a query.

ATS Online Marketplace Cart Page

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LCC | Governance | AGD Foundation | About Us | [LOGIN](#) | Join

Site Search [Go](#)

[MEMBERSHIP](#) | [EDUCATION & EVENTS](#) | [ADVOCACY](#) | [PUBLICATIONS & MEDIA](#) | [PATIENT RESOURCES](#)

[STORE HOME](#) [VIEW PREVIOUS ORDERS](#)

Qty	Item Description	Total Price
Delete	Dues: Membership Dues, Colorado AGD - Randy Richter	\$194.00

Coupon Code: [Apply](#)

Subtotal:	\$194.00
Freight:	\$0.00
Handling:	\$0.00
Tax:	\$0.00
Total:	\$194.00

[CONTINUE SHOPPING](#) [PAY NOW](#)

[f](#) [t](#) [in](#) [RSS](#) [You](#) [G+](#)

Basic Renew Concepts

- Bill people in iMIS
- Pay what you were billed
- Make changes as necessary
- Consider how to handle your Grace Period

RiSE Renew

- Show people what they were billed for
- If you want to let people change their member type or category you in essence have them “join” as that type. That will work if the dues product code is different.

ATS Online Marketplace

- Let people change their member type or billing category
- Can change chapter, or any other dues products
- Can let people only renew for some items even if the join is manual

Other Considerations

- Account Expiration Dates
- AutoPay
- AutoDraft
- Late Fees
- Taxes
- Proration

Summary

- Use RiSE for profile management
- Use RiSE for collecting join-specific information
- Use out of the box iMIS first for e-commerce
- If it doesn't meet your needs, consider the ATS Online Marketplace

Questions & Answers



Presenter:

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Moderator:

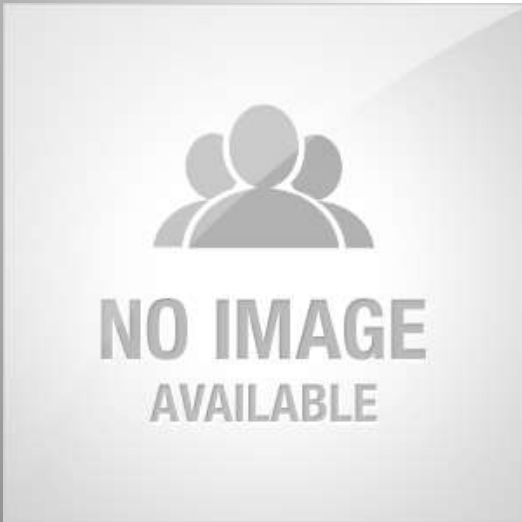
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*video recordings and
downloadable presentation slides*

Other Questions?

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