



**Please Stand By  
The Presentation will begin shortly**





# WEBINAR SERIES

## **Leveraging RiSE to Capture Important Information during Online Join/Renew Process**

### **Association Technology Solutions**

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Michelle Clemovich – Sr. IMIS Consultant

Laura Tidquist – Sr. IMIS Consultant



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



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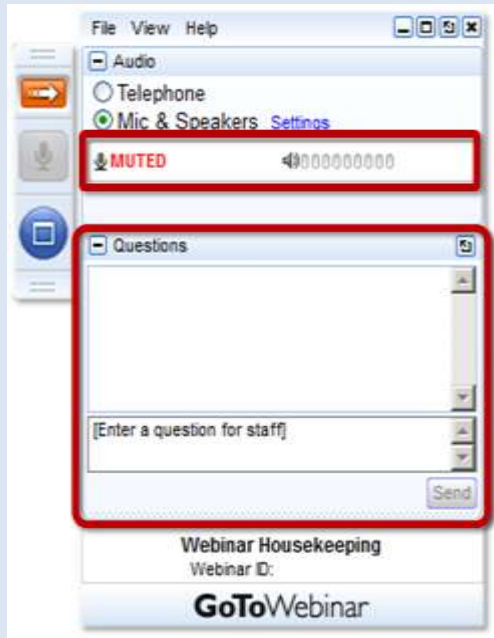
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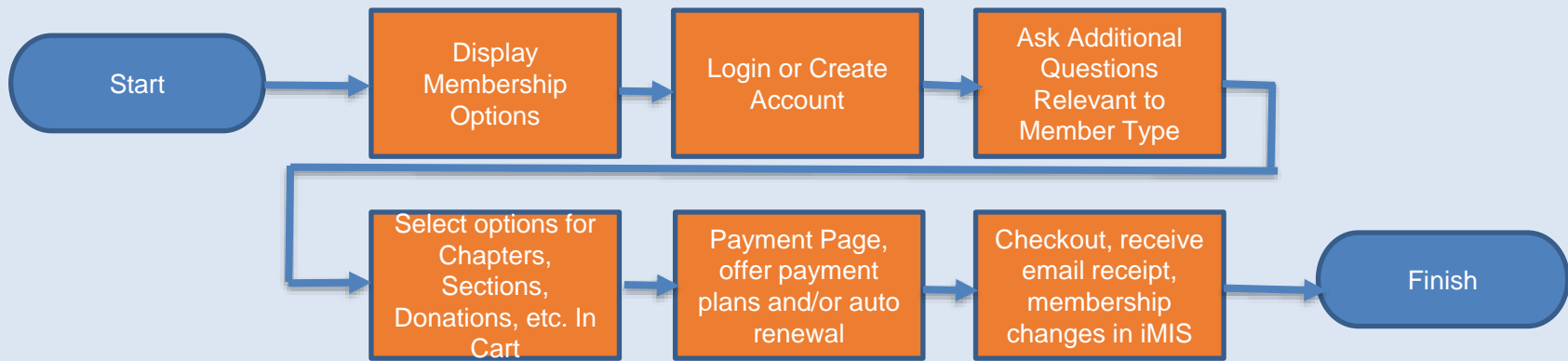


- Attendees are muted to reduce background noise
- Remember to ask questions via the **Questions** panel
- Questions will be answered during Q&A after presentation is complete



# Join Process using RiSE

## Typical join process using RiSE and enSync AutoDraft



**Join Us Today!**

“ I've always considered my membership a great investment. It's not just the opportunities to connect and learn - or how IMS has allowed my voice to be heard - but it's the little things too, like being in the National Membership Achievement Program. With IMS, we can make a difference for each other. **Alex Morgan, Vice President, Veraston Global** ”

**MEMBERSHIP**

- Benefits
- Directory
- Volunteer

**Which type of membership is right for you?**

**Associate Membership**

Associate membership is perfect for pre-professionals and vendors. Receive discounts on events and store products as well as special networking and exhibit opportunities.

**Join - associate**

**Regular Membership**

Members enjoy many benefits including professional networking opportunities, our monthly industry magazine, discounts on events, and in the shop, and up-to-date information on industry news.

**Join - regular**

**Student Membership**

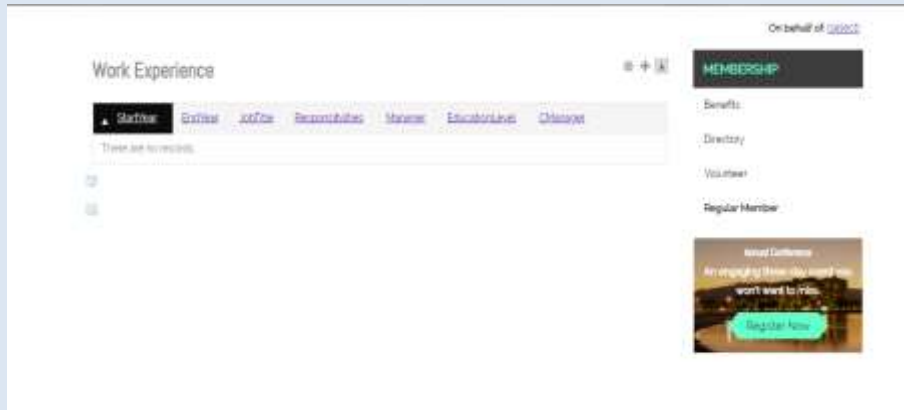
Deeply-discounted student membership is offered to anyone currently attending a two- and four-year institutions, after meeting, interviews and student \$505 fee for pre-professionals.

**Join - student**

- Provides descriptions of member types
- Each membership group displayed has a related member type and billing cycle.
- Join links take you to different Join Pages.



# Ask Additional Questions



- Each member type can have additional data collected
  - Education
  - Work Experience
  - License number







# Select Options for Payment

Regular Membership Fees

Membership Fees

Item	Unit Price	Quantity	Amount
<input checked="" type="checkbox"/> Regular Member Fees	\$20.00	1	\$20.00

Chapter Membership Fees

Item	Unit Price	Quantity	Amount
<input type="checkbox"/> [Select] Primary <a href="#">Remove</a>	0.00	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 checked="" type="checkbox"/> Journal of Professional Leadership	0.00	2	0.00
<input type="checkbox"/> Industry Insider Magazine	34.25	0	0.00

Voluntary Contributions

Item	Unit Price	Quantity	Amount
<input checked="" type="checkbox"/> PAC Contributor	\$0.00	1	\$0.00
<input type="checkbox"/> Scholarship Fund Contributor	\$0.00	0	\$0.00

Subtotal: \$20.00

[Add to Cart](#)

- Select the eligible items related to the member type
- Add donation amounts for voluntary contributions





# Enroll in AutoDraft Payment Plan

**Frequencies**

Select an Option:

**Drafting Options**

Collect payments on:

**Items available for Renewal**

These items can be drafted over the frequency selected above. All selected items will also be on annual basis.

Any items that remain in the cart and are not selected will be fully charged during checkout.

Note: If you select to pay your membership in installments, you must also select all other membership-related fees. Your payment will be divided as indicated in the payment schedule. Amounts are approximate. There may be slight variations in actual charges if individual payments are not whole dollars. The first payment will be adjusted as needed to resolve the remaining balance.

Include	Item	Recurring	Payment Amount	Over Amount
<input type="checkbox"/>	Convenience Fee		\$1.00	\$1.00
<input type="checkbox"/>	Scholarship Fund Contribution		\$1.00	\$1.00
<input type="checkbox"/>	Regular Member Fees		\$100.00	\$100.00
	<b>Total</b>		<b>\$102.00</b>	<b>\$102.00</b>

- Choose your payment frequency
- Select your payment date
- Identify which products you want to include in the payment plan. All others will be paid in full at Check out.





# Enroll in AutoPay

- Select to automatically renew for future years.

Shopping Cart

Override transaction date:

Items

There are no records.

[Update](#)

Invoices

Invoice Number	Description	Balance	
N/A	Renewal Fees - MANAGER	110.00	<a href="#">Pay Later</a>

Membership Payment Options

Single payment

Automatically pay future renewals

Cart Charges

Invoice Total	110.00
Transaction Grand Total	150.00

Payment Details

Payment amount: 110.00

Payment method:

Check number:

[Submit Order](#)





# Checkout

**Invoices**

Invoice Number	Description	Balance	
N/A	<a href="#">Renewal Fees - July 2020/21</a>	20.75	<a href="#">Pay Later</a>

You have selected these items to be paid automatically in the installment frequency you selected.

[Edit](#)

Convenience Fee  
Scholarship Fund Contribution  
Regular Member Fees

Payment	Date	Amount
1st	07/01/2020	\$20.75
2nd	04/01/2021	\$20.75
3rd	05/01/2021	\$20.75
4th	06/01/2021	\$20.75
5th	07/01/2021	\$20.75
6th	08/01/2021	\$20.75
7th	09/01/2021	\$20.75
8th	10/01/2021	\$20.75
9th	11/01/2021	\$20.75
10th	12/01/2021	\$20.75
11th	01/01/2022	\$20.75
12th	02/01/2022	\$20.75

Above is your schedule of dates and payments to be drafted. The first installment payment will be charged today in addition to all other charges not selected for the installment plan. Your payment information will be stored securely. You may edit these details by clicking the edit button above.

**Cart Charges**

Invoice Total	20.75
<b>TRANSACTION GRAND TOTAL</b>	<b>20.75</b>

Cards Accepted:

\* Add New

Name on Card:

Card Type:

Card Number:

Expiration Date:

CSC/CVE:

Card Billing Address:

Select Stored Address:

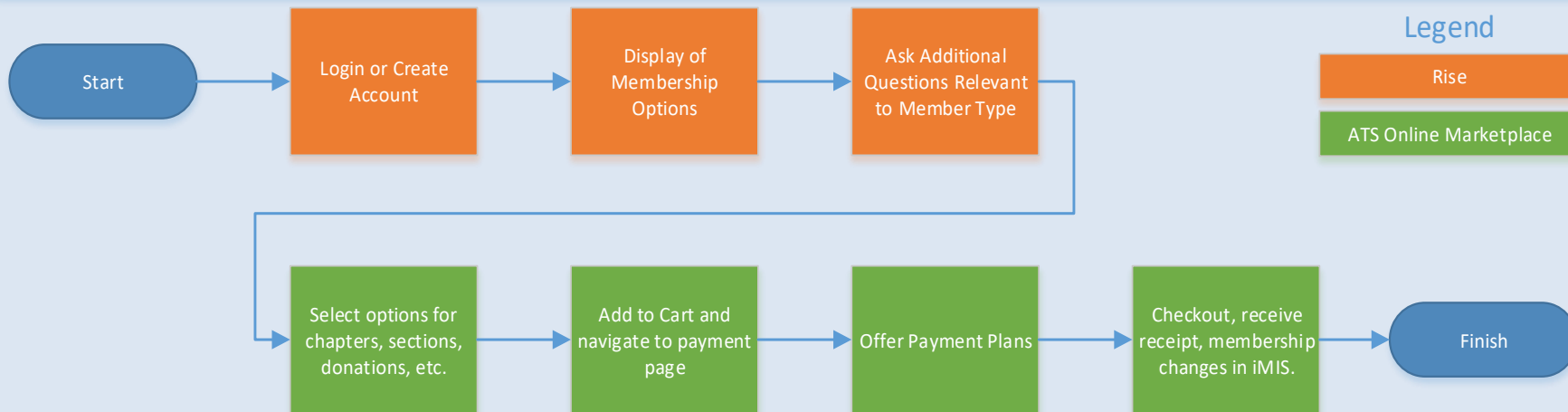
- The checkout process is standard. Payments are made based on payment plan enrollment.
- A receipt is generated for dues and emailed to the new member.
- The member type is changed in iMIS





# Join Process using RiSE and ATS Online Marketplace

## Typical Join Process using RiSE, the ATS Online Marketplace, and enSync AutoDraft



## Standard RiSE login page

- If the person has an account, they can login and continue with the join process.
- If the person does not have an account, they can create an account. The create account process can walk a person through a one or more forms to collect information to create their record.
- If person forgot login information, links are available to send reminders.



Username  
Required

Password  
Required

Keep me signed in

Sign in

[Forgot username?](#) / [Forgot password?](#)

[Create a new member account](#)

By signing in, you agree that you have read and agree to [Terms and Conditions](#) and [Privacy Policy](#).

**Join SWANA**

SWANA Events Membership Awards Training Certifications Research Advisory News Products Resources

**Become an Industry-Leading Professional with SWANA Membership**

More than 10,000 members of the Solid Waste Association of North America (SWANA) have access to resources that solid waste and recycling professionals count on to be more successful. Build leadership connections and take advantage of key resources that will set you apart from your peers and further your career. Join SWANA today!

Membership Type	Price
Public Sector Individual Member	\$225
Private Sector Individual Member	\$418
Small Business Individual Member	\$295
Young Professional Member	\$100


## Join Now Landing page

- Provides descriptions of member types
- Lists requirements for member types
- Displays price of membership



# Ask Additional Questions Relevant to Member Type

## Join as a Student Member



Sign In/Create Account

Contact Address

Personal Information

Education 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





## 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,



# Ask Additional Questions Relevant to Member Type

## Join as an Affiliate Member

Sign In/Create Account

Contact Address

Personal Information 

## 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



## **ATS\_DUES is a user-defined table within the Online Marketplace that is used to configure dues scenarios – who can join/renew**

- **Criteria**
  - Restricts 'access' through the row in ATS\_DUES via SQL view
  - Guide person through the join/renew based on data in their record
  - Example: Only contacts with a country not United States, can join as an International member
- **Profile**
  - Allows you to set restrictions on required data and direct them to a RiSE page to add/update that information via SQL view
  - Example: Students must list graduation date



# Profile field Example

DUES

⚠ You need to update your information, then restart the join process

Back

Account Update

Instructions

To receive the discounted Young Professional member rate, please fill out the information below and then click the "Finish" button.

Young Professionals

\*Birth Month: [Select] \*Birth Year: [Select]

Finish

## Organizations that have special criteria for specific Member Types

- Example - Young Members must be under the age of 30 and birth date hasn't been provided.
- Name of SQL view entered in the Profile field in the ATS\_DUES table for the Online Marketplace
- Text and link are configured in the SQL view



The image displays two screenshots of a web application interface for selecting subscription items. Both screenshots show the user's name, current member type, billing category, and last paid through date. The first screenshot shows the 'Member Type Selection' step, where the user can choose between 'Basic 2-Year Dues \$500.00' and 'Basic Membership Dues \$120.00'. The second screenshot shows the 'Chapter Selection' step, where the user can select one or more chapters: 'Travis County \$0.00', 'Harris County \$15.00', and 'Dallas County \$0.00'. The 'Harris County' option is selected in the second screenshot.

**DUES**

Alison Bessie  
Current Member Type: Non Member  
Current Billing Category: REG  
Last Paid Through Date: 12/31/2018

You are eligible to join:

Select your membership type: **Member Type Selection**

Basic 2-Year Dues \$500.00

Basic Membership Dues \$120.00

**Next**

**DUES**

Alison Bessie  
Current Member Type: Non Member  
Current Billing Category: REG  
Last Paid Through Date: 12/31/2018

You are eligible to join:

Select your chapters: **Chapter Selection**

Travis County \$0.00

Harris County \$15.00

Dallas County \$0.00

**Back** **Next**

## Organizations have a different set of rules for dues and subscriptions

- Simple dues such as BASIC
- More complex dues/subscriptions include chapters, sections, miscellaneous items, subscriptions, and even donations.
- For example, some have different sets of items for students and regular members.

- IQA to determine 'selected', 'suggested', and 'other' products by product type
- IQA per dues product type
- Customizable label text
- Selected products display first
- Suggested/Recommended display second
- Other display third
- Example: Suggest chapter based on zip code/location

The screenshot displays a web interface for selecting chapters, organized into three distinct sections:

- Chapters you have previously selected:** This section is titled with the label `lblDuesChpaterSubscribedText` and contains one option: "California \$30.00" with a checked checkbox.
- Recommended chapters:** This section is titled with the label `lblDuesChapterSuggestedText` and contains one option: "Colorado \$30.00" with an unchecked checkbox.
- Other chapters:** This section is titled with the label `lblDuesChapterOtherText` and contains two options: "Dallas County Texas \$5.00" and "Florida \$40.00", both with unchecked checkboxes.



# Dues Product Prerequisites

- General Lookup table to determine if a person should be able to view a product.
- Example: Only people in the Colorado chapter see the Denver section

General lookup tables

General tables

<u>Code</u>	<u>Description</u>
CHAPT/COLO2YR	BASIC2
DENVER	CHAPT/COLORADO,CHAPT/WYOMING
DENVOL	DENVER
INIT	BASIC
JOUR2YR	BASIC2





# Select Subscription Items

**DUES**

Alison Sesson  
Current Member Type: Active Member  
Current Billing Category: REG  
Last Paid Through Date: 12/31/2016

You are eligible to join:

**Section Selection**

Education Section: \$100.00  
EDUC

Finance Section: \$50.00

Back Next

---

Alison Sesson  
Current Member Type: Non-Member  
Current Billing Category: REG  
Last Paid Through Date: 12/31/2016

You are eligible to join:

**Voluntary Items Selection**

**PAC Contribution**  
This is a voluntary dues item in AFE

**Voluntary Dues with Special Pricing**

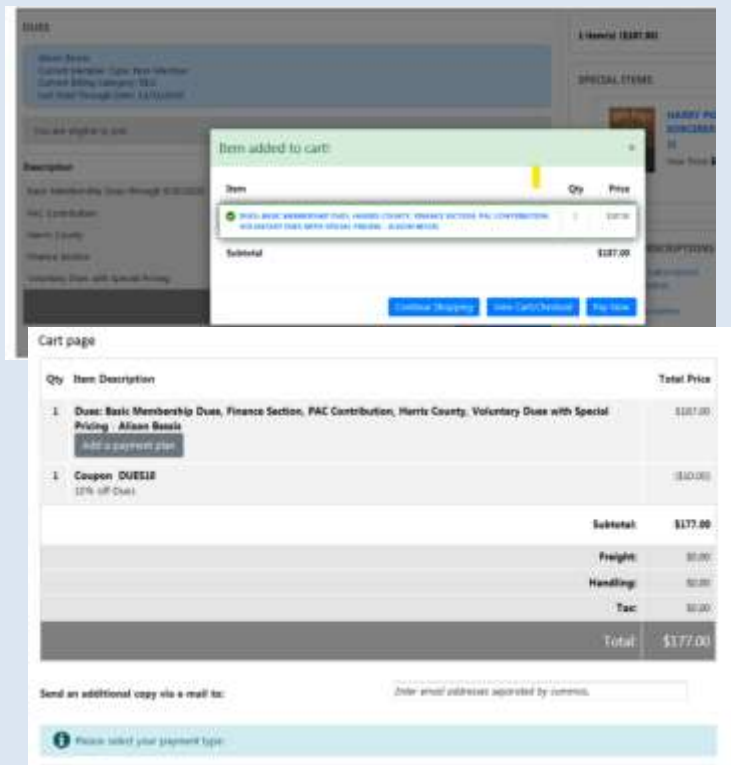
Back Next

## Organizations have a different set of rules for dues and subscriptions

- Any combination of dues product types is allowed
  - DUES
  - CHAPT
  - SEC
  - MISC
  - SUB
- VOL item prices are editable







The image shows a website interface with a green notification box that says "Item added to cart:". Below the notification is a table with columns for "Item", "Qty", and "Price". The table contains one row for a membership fee and a subtotal of \$177.00. Below the notification is a "Cart page" summary table with columns for "Qty", "Item Description", and "Total Price". The table lists a membership fee for \$177.00 and a 12% off coupon for -\$20.00. The subtotal is \$177.00, and the total is \$177.00. There are also buttons for "Continue Shopping", "View Cart/Checkout", and "Go Home".

Qty	Item Description	Total Price
1	Dues: Basic Membership Dues, Finance Section, PAC Contribution, Harris County, Voluntary Dues with Special Pricing - All-in Basic	\$177.00
1	Coupon DUES12 12% off Dues	-\$20.00
	Subtotal:	\$177.00
	Freight:	\$0.00
	Handling:	\$0.00
	Tax:	\$0.00
	Total:	\$177.00

- Add items to the cart and continue shopping, view the cart or go directly to the checkout.
- Enter a coupon or provide “personal coupons” that will automatically float up on the screen if the person is eligible to use them.



# Payment Plans

## enSYNC Online AutoDraft for Online Marketplace

- Add-on module to Marketplace
- Select Payment Plan Options
  - Text is fully customizable
  - Terms of yearly, bi-annual, quarterly, and monthly available

Payment Options

Payment Options

**ANNUAL**

✓ 1x Payments of \$190.00  
Paid in full today

**SEMI\_ANNUAL**

2x Payment of \$96.50  
\$96.50 paid today and the balance paid in six months.

**QUARTERLY**

4x Payment of \$49.75  
\$49.75 paid today and three additional payments occurring each quarter.

**MONTHLY**

12x Payments of \$18.58  
\$18.58 paid today and the balance paid monthly for the remainder of the term.

Cancel Save

Qty	Item Description	Total Price
1	Dues: Basic Membership Dues, Payment Plan Surcharge, Finance Section, PAC Contribution, Harris County, Voluntary Dues with Special Pricing - Alison Bessis 12x Payments of \$18.58 \$18.58 paid today and the balance paid monthly for the remainder of the term. Yes, please auto renew my membership for next year. <a href="#">Change your payment plan</a>	\$18.58
<b>Subtotal:</b>		<b>\$18.58</b>
<b>Freight:</b>		\$0.00
<b>Handling:</b>		\$0.00
<b>Tax:</b>		\$0.00
<b>Total:</b>		<b>\$18.58</b>

Send an additional copy via e-mail to:

Payment Details

**NAME ON CARD:**

**CARD NUMBER:**  **EXP. DATE:**  /   
MONTH YEAR

**SECURITY CODE:**

**STREET ADDRESS:**

710/DOCTAL CONF.





# Payment Plans

## enSYNC Online AutoDraft for Online Marketplace

- Ability to save credit cards
- PCI Compliant
- Can be used on future purchases

Qty	Item Description	Total Price
1	Dues: Basic Membership Dues, Dallas County - Stan Pickett 2x Payment of \$140.50 \$140.50 paid today and the balance paid in six months. Yes, please auto renew my membership for next year. <a href="#">Change your payment plan</a>	\$140.50
<b>Subtotal:</b>		<b>\$140.50</b>
Freight:		\$0.00
Handling:		\$0.00
Tax:		\$0.00
<b>Total:</b>		<b>\$140.50</b>

Send an additional copy via e-mail to:

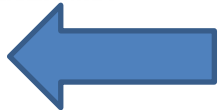
Please select your payment type:  
 Credit Card  Electronic Check/ACH  PayPal Express  Administrator Options

Payment Details

- VISA ENDING IN 1111
- MASTERCARD ENDING IN 5100
- AMERICAN EXPRESS ENDING IN 0005
- NEW CARD

Total: \$140.50

[Continue Shopping](#) [View Cart/Checkout](#) [Charge Credit Card](#)





# Dues List Bill

- Allows a person to pay dues for their company or billed company members
- Simple selection to pay what's been billed

**Dues**

*lblDuesListBillHeaderText*

Check the box next to the records to renew, then click add to cart.

**Add To Cart**

<input type="checkbox"/>	NAME	CURRENT PAID THRU	NEW PAID THRU	BALANCE
<input checked="" type="checkbox"/>	Jake Smith	12/31/2017	12/31/2018	\$120.00
<input checked="" type="checkbox"/>	Robert Williams	12/31/2017	12/31/2018	\$120.00

**Add To Cart**



- Coupons can be dollars off or percent off
- Restrictions by member type, product type, product code, SQL view or iMIS ID
- If explicitly restricted by iMIS ID presented as a personal coupon
- Webservice to create personal coupons – example: member get a member campaign creates a coupon on both people's record for the future

ACME ASSOCIATION

Home / Login / Contact Us

Keyword Search

PERSONAL COUPONS

Select coupons by checking the box next to the coupon

10% Off Purchase of Events

25% off your next order.

Select APPLY to add these coupons to your cart.

VIEW PREVIOUS ORDERS

Qty	Item Description	Total Price
1	2016 Directory Iron	\$75.00

Subtotal: \$75.00



# Dues Join/Renew and Pay Later

- Allows a person to join and/or renew and opt to pay later
- Member Type Updated
- Join Date Updated
- Name.PAID\_THRU not updated
- Subscription records created in a 'billed' state

**DUES**

Laura Tidquist  
Current Member Type: Individual Member  
Current Billing Category: REG  
Last Paid Through Date: 12/31/2019

Description	Amount
Basic Membership Dues through 12/31/2019	\$120.00
Dallas County	\$45.00
Education Section	\$10.00
Journal Subscription	\$65.00
<b>Total:</b>	<b>\$240.00</b>

ⓘ Renew and pay later by clicking on the button to Renew and Pay Later. You will immediately be renewed and are obligated to send payment asap.

Back   Renew and Pay Later   Add To Cart

Callouts:  
- DuesJoinPayLaterNotice or DuesRenewPayLaterNotice (points to the info message)  
- DuesJoinPayLaterButtonText or DuesRenewPayLaterButtonText (points to the 'Renew and Pay Later' button)



- The checkout process is standard.
- A receipt is generated for dues and emailed to the new member.
- The member may come back to the site and view, reprint, or email a receipt at any time.
- The iMIS API's modify the member type (where applicable) and paid through dates.

**Net Result:** The record looks as if it were manually processed by a staff member.

## RiSE

- Cloud friendly
- Email receipts can be customized with communication template
- Enroll in automatic annual renewals using ASI's AutoPay
- Ability to apply credits

## ATS Online Marketplace

- Ability to use coupons
- Offer CEU training dollars
- Provide X number of complimentary dues products by product type (i.e. 1 free chapter)
- Pay your own, someone else's or your company's dues
- Join/Renew and pay later

**enSync's AutoDraft** allows for payment plans in both RiSE and ATS Online Marketplace





# Summary

- Dues processes can be customized to meet the specific needs of each organization while using Out of the Box RiSE tools
- Different options can be applied for join and renew
- Combine RiSE, Online Marketplace, and enSYNC Online AutoDraft for payment plans to make a very robust experience





# Questions & Answers





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<http://atsol.org/Webinars>

*schedule of upcoming webinars*

### Past Webinars

<http://atsol.org/PastWebinars>

*video recordings and downloadable  
presentation slides*

### Other Questions?

Email: [info@atsol.org](mailto:info@atsol.org)

Online: <http://www.atsol.org>

Phone: (720) 945-7252

