

IRD Association Inc.

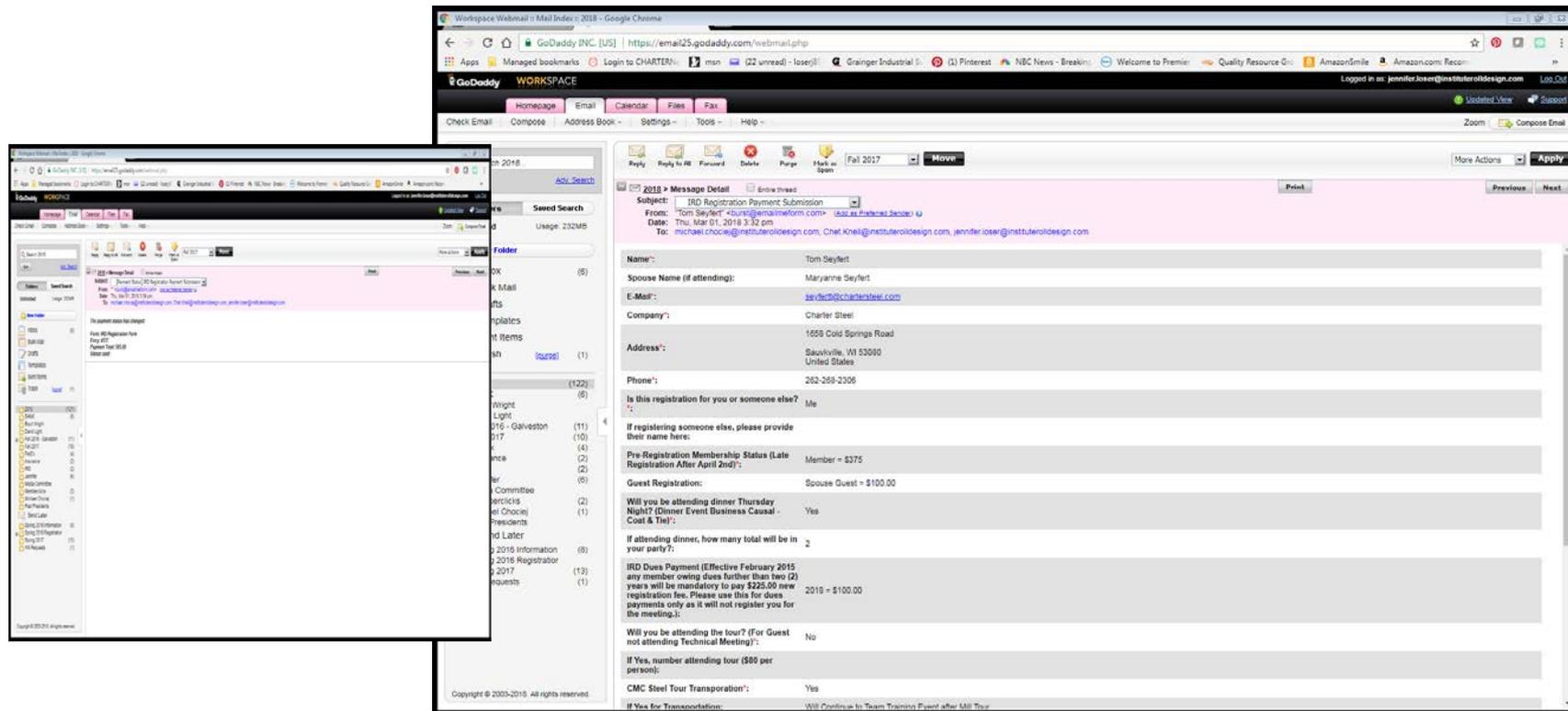


2018 Update – Membership/Registration Enhancements



Current Process for Members to Register for Meetings

- Secretary sends out meeting announcement
- Attendees go to IRD.net and register for meeting
 - Form is filled out
 - PayPal Payment



The Treasurer and Secretary get an email with the registration and a separate email confirming the PayPal payment processed.

This then triggers two additional manual processes

Secretary

1. Creates a spreadsheet to track the information for reporting
2. Verifies accuracy of registration
3. Works with Treasurer to correct registrations and verify head counts

If at any point information is not correct the process has to stop and additional emails and/or phone calls have to be made. These manual processes mean our “volunteers” are spending more than 20 hours a week **Reprocessing** registrations for each meeting.

Treasurer

1. Verifies payment has processed in PayPal
2. Opens QuickBooks and Verifies attendee is Member vs Non Member
3. Verifies Member is current on dues
4. Verifies Member information in QuickBooks is correct
5. Enters a sales receipt in QuickBooks
6. Sends receipts to attendees
7. Works with Secretary to verify head counts and registration accuracy

Why do we do that?

Each event is set up and costed based on head counts.

Room Set ups

Meal Counts

Final Costs to the IRD

The more accurate our up front information is the better we can manage our costs.

Can it be done better?

YES!



MemberClicks

WHAT OUR PRODUCT DOES



Member Landing Page

Home About Us Membership Events Member's Only Contact Us

HELLO
my name is
Jillian Dunbar
Home Depot
Annual Conference Committee, Corporate Sponsor, Staff

See something wrong? [Update your profile!](#)

[My Profile](#) [Member Directory](#) [Membership Card](#) [Event Calendar](#) [My Community](#) [Community Forum](#)

Video of the Month

Take Your Dog to Work Day was first celebrated in 1999 to celebrate our canine friends and encourage people to adopt their pets from humane societies and animal shelters.

Research has shown that there a **ton** of benefits to having animals in the workplace. According to a 2008 American Pet Products Manufacturers Association study, whether you have a dog, cat, bird, reptile, fish or another creature, the perks of pet-ownership – including lower blood pressure and reduced stress levels – often translate to an office space. Pets inherently create relaxing and creative work environments! Additionally, a 2006 APPMA survey showed that one in five companies allows pets in the workplace!

Video of the Month

Quick Links

[Join Now](#)

[View Calendar](#)

[Donate](#)

Upcoming Events

Thu Nov 9, 2017
[Events Committee Meeting](#)
Category: Committee Meetings

Wed Nov 15, 2017
[Board Meeting](#)
Category: Committee Meetings

Fri Nov 24, 2017
[Networkit!](#)
Category: Networking Events

Fri Nov 24, 2017
[Networking Happy Hour](#)
Category: Monthly Happy Hours

[View Full Calendar](#)

Announcements

 We are pleased to welcome our new Executive Director, Beth Sanders. Meet Beth at this month's Networking Luncheon!

Our Tweets

Tweets by @MemberClicks

 **MemberClicks**
@MemberClicks

Video of the Month



Member Landing Page:

- Centralized Hub for members
- Members-Only Content
- Fully customizable page
- <https://irda.me/memberclicks.net/admin>

My Community My Profile Connections My Features Inbox 1 Search Directory



Jillian Dunbar
Currently serving on the Annual Conference Committee.
2 months ago

Last online
less than a minute ago

Profile views
2 view(s)

Latest Photos



Circles



Show all (2)

My Status

Share your thoughts here...

Change Profile Picture Start a new circle Write Message
Privacy Upload photos View your inbox

Wall

Username
jhd Edit

Expiration Date
07/31/2018

Join Date
03/04/2016

Member Type
Staff

Group
Staff, Corporate Sponsor, Annual Conference Committee

Member Status
Active

Member Number
306

Full Name
Jillian Dunbar

Contact Name
Jillian Dunbar

Organization
Home Depot

Email - Preferred
sfrees@memberclicks.com

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MemberClicks
@MemberClicks

Is social media a part of your organization's growth strategy? It should be! hubs.ly/H0962vW0 #asnchat #socialmedia



3 Ways to Use Social Me...

[Embed](#) [View on Twitter](#)

Member Profile

Individual Profile (employee of Member Company):

- Social Community (discussion boards, internal social network)
- Attributes – individual data fields captured on contacts and members.

FORM SUBMISSIONS

Event Registration, Membership Application (Online,) Membership Satisfaction Survey, Board Election, etc etc

Event Registration

2018 Conference Registration

Register for this event below. Registration costs are automatically applied based on your current status of membership. Member will reflect \$375 for registration, Non-Member will reflect \$475, and Retiree will reflect \$50.

Register Yourself

Register Guest

Next

The Registration itself can be customized – I put in the text with the membership + registration values. The system is set up to automatically recognize those values based on whether the person registering is a Member, Nonmember, or Retiree.

2018 Conference Registration

Register for this event below. Registration costs are automatically applied based on your current status of membership. Member will reflect \$375 for registration, Non-Member will reflect \$475, and Retiree will reflect \$50.

▼ Sarah Freese (Self) [Cancel](#)

Registrant Name*

Email

Preferred*

Organization*

Address - Work*

Phone

Work*

The beginning of the registration form where they can input standard information. Because this person is a member, and logged into the system, it autopopulates their information into the form (saving time and effort.)

Registration*

- Full Conference - \$150.00
- One day ONLY (specify day below) - \$50.00

If attending dinner, how many total will be in your party?

Will you be attending the tour? (For Guest not attending Technical Meeting)

- Yes
- No

If Yes, number attending tour (\$80/person)

CMC Steel Tour Transportation

- None
- Yes
- No

Number Riding Bus

Bus Tour Contribution

Register Guest

Next

The bottom of page 1 of the registration form is where I've added IRD-specific info, such as their Registration info, dinner attendance, tours, transportation, etc.

If this member is bringing a Spouse or a guest, they also have the ability to register them both in one transaction using the Register Guest button at the bottom.

Donations

Additional Meeting Contribution (optional)

\$

Would you like to designate your contribution for:

- None
- Sponsor a membership
- Sponsor a conference registration
- No preference

[Previous](#)

[Next](#)

You would also be able to process a donation.

Summary

Discount Code

Enter a discount code:

2018 Conference Registration

Sarah Freese

Email - Preferred:

sfreese@memberclicks.com

Organization:

MemberClicks

Address - Work:

3495 Piedmont Road

Atlanta Georgia 30305

United States

Registration:

Full Conference

\$150.00

If attending dinner, how many total will be in your party?:

Will you be attending the tour? (For Guest not attending Technical Meeting):

Donations

Additional Meeting Contribution (optional):

Would you like to designate your contribution for::

Total:

\$150.00

Here is our summary page that shows the selections I have made. If there is early-bird pricing, the system will automatically recognize that in the form (and that Discount Code section will not show.)

Total: \$150.00

How would you like to pay?

Pay now

Credit Card Payment

First Name

Sarah

Last Name

Freese

Credit Card Number

Credit Card Type

CVV

[What is my CVV code?](#)

Expiration Month

01 - January

Expiration Year

2018

Payment Info

Once the form is complete, this member can proceed to payment – they can easily input their credit card into the Form. Once submitted, this form AND its associated invoice is stored in the members profile, as well as emailed out to them as confirmation.

Individual Name*

Keyboard Middle Name Jones

Email

Preferred*

keyboard@aol.yahoo.memberclicks.com

Alternate

Company*

123

Address - Work*

123

Line 2

123 Alaska 12312

Select Country

Phone

Work*

123

Cell

IRD Dues (Effective February 2015 any member owing dues further than two (2) years will be mandatory to pay \$225.00 new registration fee)*

- 2015 - \$100.00
- 2016 - \$100.00
- 2017 - \$100.00
- 2018 - \$100.00
- 2019 - \$100.00
- 2020 - \$100.00
- Late Payment Further than (2) Years - \$225.00
- Retiree Payment 1 - \$5.00
- Retiree Payment 2 - \$10.00

Next

Membership Application

This is a sample of the Membership Application – This is a sample only, our specific application will mirror closely what today's form looks like.



Summary

Membership

Member Type:

Professional

Membership Options:

1 period - \$100.00 (through Jan 15, 2019)

\$100.00

Automatically Renew:

false

Applicant

Keyboard Jones

Individual Name:

Keyboard Jones

Email - Preferred:

keyboard@aol.yahoo.memberclicks.com

Email - Alternate:**Company:**

123

Address - Work:

123

123 Alaska 12312

Phone - Work:

123

Phone - Cell:

IRD Dues (Effective February 2015 any member owing dues further than two (2) years will be mandatory to pay \$225.00 new registration fee):

\$100.00

2017

\$100.00

2018

Total:

\$300.00

Previous

Next

Here is a sample summary page of the Membership application before going to payment information (which will look identical to payment information in event registrations.

Administrative Dashboard

Membership Dashboard

Current Membership Rosters				
Member Type	Lapsed	Graced	Pending	Active
Admin	0	0	0	2
Corporate Sponsor	0	0	0	2
- Corporate Sponsor Employee	0	0	0	4
Individual	20	0	1	5
Organization	2	0	0	17
- Staff	0	0	0	13
Professional	172	0	0	21
Student	26	0	0	3
Total	220	0	1	67
Prospect				49
Total Active				116

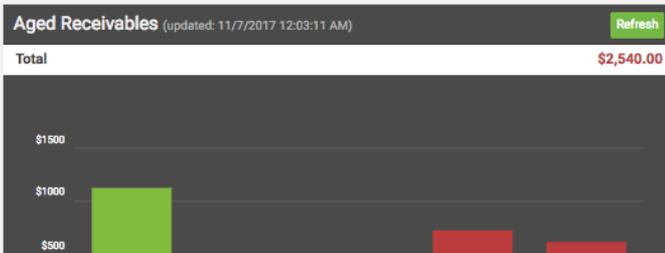
New Members in the Last 90 Days	
Member Type	New Members
Admin	0
Corporate Sponsor	0
- Corporate Sponsor Employee	0
Individual	0
Organization	0
- Staff	0
Professional	2
Student	0
Total	2
Prospect	0
Total New	2

Event Dashboard

Past Event Attendance		
Event Name	Date	Attended
2017 Conference	10/27/2017	3
October Member Event	10/23/2017	0
Event Section	10/19/2017	0

Upcoming Expected Event Attendance		
Event Name	Date	Registered
2017 NEVCA Event	11/30/2017	3

Financial Dashboard



Database/Profile List

The screenshot displays the 'Advanced Search' modal window in the MemberClicks database interface. The modal is titled 'Advanced Search' and features several search options:

- Search by Attribute Value:** This section is currently turned **ON**. It includes three criteria:
 - [Address | Home | Zip] with the value 30319.
 - PAC Donation with the value 1000.
 - [Last Modified Date] with the value Last 30 Days.
- Add Criteria:** A button to add more search criteria.
- Match All Criteria:** A dropdown menu set to 'Match All Criteria'.
- Search by Form Submissions:** This section is currently turned **OFF**.
- Search by Event Status:** This section is currently turned **OFF**.

At the bottom of the modal, there are buttons for 'Save Criteria', 'Clear', 'Cancel', and 'Search'. The background shows a list of member profiles with columns for Name, Address, Email, and Last Modified Date.

Ability to create simple and complex searches within the database to target specific groups of members or non-members. Also have the ability to save those searches for frequent use.

Questions?

