



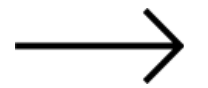
CAUSEIS PRESENTS

# Digital Academy for Associations

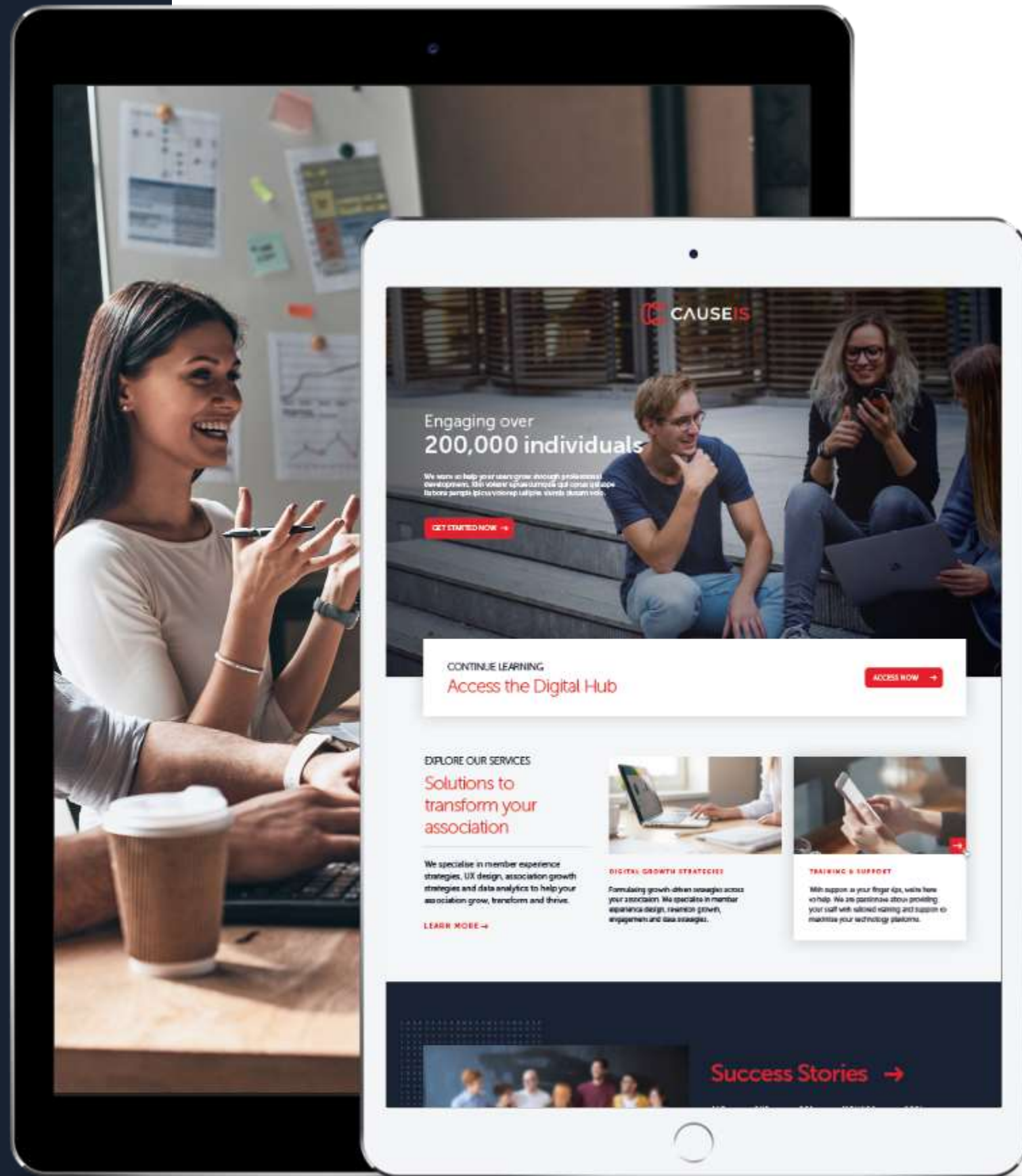
→ Course: Managing your Membership  
Successfully in iMIS



Digital Academy



# Welcome to the Digital Academy



- Time to focus on your Association Strategy
- Learn from other associations and your peers
- Use Member Experience techniques to shift your strategies
- Dedicated Engage iMIS courses to maximise your knowledge of iMIS.
- Consider new culture, innovation and ideas
- Tools and frameworks to help you



# About Causeis

## Causeis exists to support associations.

Causeis is the complete Digital Partner for your association, and we bring a shared vision for your success.

With unmatched experience in association strategy and technology to draw on, every aspect of our service is centered around the member experience.

Partnered with global best-in-class technology, we ensure you have all bases covered with Causeis.

Recently named by ASI as the Global iMIS Partner of the Year.



# Supported by AuSAE

The home for association professionals.

A place where you belong, connect with others, advance your career and be inspired.

[www.ausae.org.au](http://www.ausae.org.au)



# Maximise your Workshop Experience



## Mute as required

To allow for clear audio please mute yourself when presentation sessions are in session. At times we may mute your line if you may have forgotten.

## Session recording

Today's presentations are being recorded however to maximise you're sharing and networking the breakout rooms will not.

## Presentation Slides

Presentation slides and recording will be distributed on course completion.

## Chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat. Share ideas, successes and learnings.

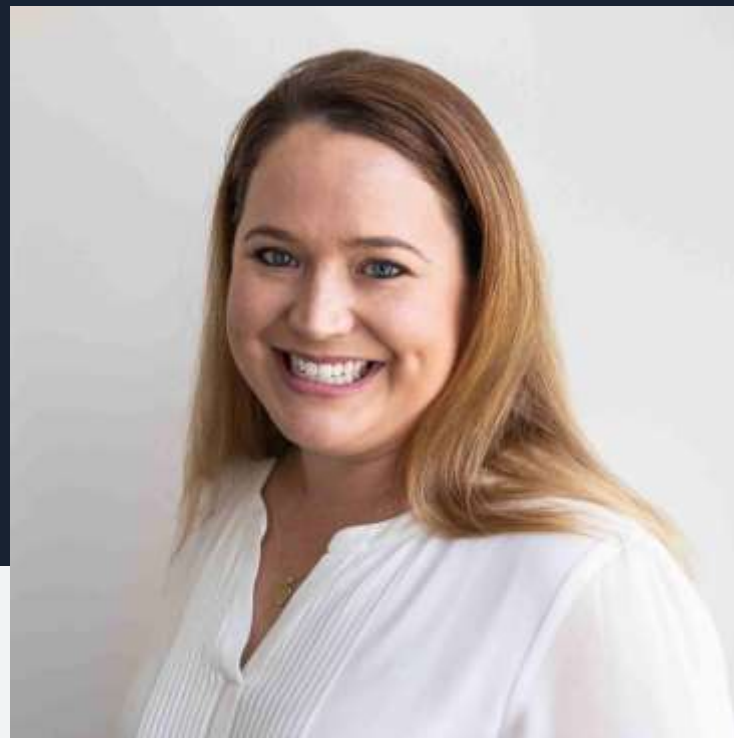
## Use your camera

Especially in the breakout rooms, please don't be shy and turn on your camera to increase your engagement.

## Update your Name

So that we know who you are, and to let everyone know where you are from – lets rename ourselves to show our full name & acronym

# Presenters & Facilitators



Michelle Lelempsis, CiP, CiSE  
Managing Director  
Causeis



Annie Corless, CiA  
Implementation Consultant  
Causeis

Tuesday,  
8<sup>th</sup> February

## Course Agenda 10am – 12pm AEDT

iMIS Membership Billing Configuration:

- Product Codes
- Pro-rate
- Billing Cycles
- Member Types
- Category

Tuesday,  
8<sup>th</sup> February

## Course Agenda 10am – 12pm AEDT

### Managing your Membership

- Renewal Checklist
- Data Integrity for Membership
- Alerts and Personalisation
- AutoPay

### Break-out Room & Networking

# Managing your Membership in iMIS

Annie Corless, CiA





# What determines how a member is billed?

**Regular Membership Fees**

Term dates: 6/1/2020 to 5/31/2021

**Membership Fees**

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

**Chapter Membership Fees**

Item	Unit Price	Quantity	Amount	Balance
West Chapter <input type="checkbox"/> Primary <a href="#">Remove</a>	45.00	1	45.00	45.00

**Sections and Specialty Groups**

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

**Journals and Other Subscriptions**

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

**Voluntary Contributions**

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

# iMIS Membership: Key to Success



## Configuration options

Define the overarching iMIS system setting for your membership. Cash vs accrual, terms and pro-rate options.

## Billing Products

Code, pricing and member types that the product is available for.

## Billing Cycles

Create a new cycle name or edit a current cycle, identify who to bill, what to bill them, and the frequency.

## Pro-rate Rules

To effectively manage your new member pricing rules pro-rate will cater for partial joins.



# Record Types

- Community
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Finance
- Continuum
- RISE
- Settings
  - About iMIS
  - Organization
  - Contacts
    - General
    - Contact security
    - Communication

### Customer types

[Add new customer type](#)

21 items in 2 pages

Page size: 20

Show all 21

Name	Code	Organization	Member	
Associate Member	A		✓	✗
Applicant	APPL			✗
Chapter Member	CH		✓	✗
Company Member	CM	✓	✓	✗
Community Partner	COMMP		✓	✗
Donor	D			✗
Affiliate Member	DUES		✓	✗
Household	HH	✓		✗
Hotel	HOTEL	✓		✗
Regular Member	M		✓	✗



# Product Codes: Membership

**iMIS**

Mr. Brian Murphy

- Community
- Membership**
  - Dashboard
  - Chapters
  - Renewals
  - Manage expired members
  - Automatic payments
- Billing cycles
- Billing products**
  - Prorating rules
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Finance
- Continuum
- RISE
- Settings

### Associate Member Fees

Type:

Code:

Name:

Description:

### Pricing

Standard price:

Discount price:

Use special pricing

Pay priority:

Term span in months:

### Accounting

Financial entity:

Charitable item

28



# Product Codes: Billing Cycles

**iMIS**

Keyword search

Mr. Brian Murphy

## Professional Membership

• Cycle name: Professional Membership

Membership billing cycle

Customer types: Professional Member x

Categories: \*ALL\* x

### Products

Dues: Select dues product

Chapters: Select chapter product

Miscellaneous: Select miscellaneous product

Sections/Specialty: Select section/specialty product

Subscriptions: Select subscription product

Voluntary: Select voluntary product

### Billing type

Billing time: Anniversary v

Accounting method: Accrual v *AutoPay contacts are always billed using Accrual*

Default AutoPay:  Bill all contacts



# Product Codes: Pro-rate Rules

**iMIS**

### Edit PRORATE

**+Name**

**Description**

**+Number of months**

#### Schedule

Fiscal month	Multiplier	Options
1	<input type="text" value="1.00000"/>	<input type="text" value="(None)"/>
2	<input type="text" value="0.91667"/>	<input type="text" value="(None)"/>
3	<input type="text" value="0.83333"/>	<input type="text" value="(None)"/>
4	<input type="text" value="0.75000"/>	<input type="text" value="(None)"/>
5	<input type="text" value="0.66667"/>	<input type="text" value="(None)"/>
6	<input type="text" value="0.58333"/>	<input type="text" value="(None)"/>
7	<input type="text" value="0.50000"/>	<input type="text" value="(None)"/>
8	<input type="text" value="0.41667"/>	<input type="text" value="(None)"/>

- Community
- Membership
  - Dashboard
  - Chapters
  - Renewals
  - Manage expired members
  - Automatic payments
  - Billing cycles
  - Billing products
  - Prorating rules**
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Finance
- Continuum
- RISE
- Settings



# Product Codes: Pro-rate Rules

**Edit PRORATE**

\*Name

Description

\*Number of months

**Schedule**

Fiscal month	Multiplier	Options
1	<input type="text" value="1.00000"/>	<input type="text" value="(None)"/> <b>(None)</b> Future Credit Bump Date
2	<input type="text" value="0.91667"/>	



# Configuration options

**iMIS**

Community Membership Fundraising Events Commerce Marketing Certification Finance Continuum RISE Settings

About iMIS Organization Contacts Addresses Communities **Membership** Fundraising Events Commerce

Keyword search

Mr. Brian Murphy

### Billing options

Standard billing interval: 12

Accounting method:  Cash  Accrual

Billing time:  Annual  Anniversary

Paid thru date update:  Paid in full  Billing time

Update paid thru date for complimentary items at payment time

Payment application basis:  Priority  Proportional

Prorating:  Do not prorate  Standard prorating  Special prorating

Maintain previous balance

### Start date control

Apply to new members

Advance start month as of: 15

Apply to delinquent customers (Cash only)

Grace period in: 3



# Configuration options

**iMIS**

- Community
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Finance
- Continuum
- RISE
- Settings**
  - About iMIS
  - Organization
  - Contacts
  - Addresses
  - Communities
  - Membership**
  - Fundraising
  - Events
  - Commerce

Special prorating

Maintain previous balance <sup>i</sup>

**Start date control**

Apply to new members

Advance start month as of

Apply to delinquent customers (Cash only)

Grace period in months

Membership renewal prior to billing

Number of days prior to expiration that members can renew in advance

Allow staff to manage chapter memberships directly from member list (recommended only if all chapters are complimentary)

Allow chapter administrators to manage chapter memberships directly from member list (recommended only if all chapters are complimentary)

**Billing contact**

[select](#) [remove](#)

Mrs. Karen Simpson - karensimpson@mailinator.com

[Save](#) [Cancel](#)

# Let's talk briefly about Accounting

Michelle Lelempsis, CiSE, CiP





# Product Codes: Membership

**iMIS**

- Community
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Finance
- Continuum
- RiSE
- Settings
- About iMIS
- Organization
- Contacts
- Addresses
- Communities
- Membership
- Fundraising
- Events
- Commerce
- Finance
- RiSE
- Language translation
- General lookup tables

### Billing options

Standard billing interval: 12

Accounting method:  Cash  Accrual

Billing time:  Annual  Anniversary

Paid thru date update:  Paid in full  Billing time

Update paid thru date for complimentary items at payment time

Payment application basis:  Priority  Proportional

Prorating:  Do not prorate  Standard prorating  Special prorating

Maintain previous balance

#### Start date control

Apply to new members

Advance start month as of: 15

Apply to delinquent customers (Cash only)

Grace period in months: 3

Membership renewal prior to billing: Allow for staff only

Number of days prior to expiration that members can renew in advance: 0

Careful: This is not the same as Income in Advance ....

What does Cash vs Accrual mean here?

When would you need Accrual?



# Product Codes: Membership

Transaction processing – What happens?

Cash based

- Billing Cycles raises “reporting” lines
- Income raised when renewal paid
- Accounts Receivable lines are not created in dues when cash based

Accrual based

- Billing cycle raises income and AR transactions
- Renewal paid bank expected and AR paid

What about the Deferred Income?

A wooden clock with a light-colored face and a dark wooden frame is mounted on a light-colored wall. Below the clock, on a wooden desk, is a wooden pencil holder filled with various colored pencils. To the right of the pencil holder are three books standing upright, with spines in shades of brown and blue.

# Dates Dates and More Dates

## Annie Corless, CiA



# What dates matter for membership?

01

## Join Date

New members start date  
Drives the pricing rule  
If the Join date falls into the current year then will use pro-rate

02

## Paid Thru Date

Identifies how far a member has paid their membership  
If less than today, then not financial  
What happens if it is blank?

03

## Renew Thru Date

Identifies how far the member has been billed and invoiced



# Date scenarios: What does this mean?

01

**Join Date**

1<sup>st</sup> July 2020

02

**Paid Thru Date**

30<sup>th</sup> June 2022

03

**Renew Thru Date**

30<sup>th</sup> June 2022



# Date scenarios: What does this mean?

01

**Join Date**

07<sup>th</sup> January 2022

02

**Paid Thru Date**

28<sup>th</sup> February 2022

03

**Renew Thru Date**

28<sup>th</sup> February 2022



# Date scenarios: What does this mean?

01

**Join Date**

1<sup>st</sup> September 2014

02

**Paid Thru Date**

31<sup>st</sup> May 2022

03

**Renew Thru Date**

31<sup>st</sup> December 2021

# Let's take a 5-minute break

Grab a refreshment

Please feel free to mute and turn off your camera

Don't close the Zoom session

A wooden clock on a wall, a wooden pencil holder with pencils, and a stack of books on a desk.

# Renewal Checklist

## Annie Corless, CiA

# Your Renewal Checklist



## Data Review: Paid Thru Dates

Check all Paid Thru dates are not over the current membership year or empty.

## Data Review: Check your Renew Thru Dates

Check all Renew Thru dates are not over the current membership year

## Status of Members

Check that your Members are all active, or they will not be billed.

## Membership Categories

Validate that all members have a category or valid logic of a category. .

## Use iQA

Create an iQA report that allows you to export ALL members with and without billing data for before and after billing.

## Update your Pricing Rules

Most membership years, need a price update. Check and recheck.

# Your Renewal Checklist



## Test and Re-test

How can you test in iMIS EMS?

## Run your Renewals

Run your renewals and spot check on every record type and category combination.

## Review the Renewal Log

Export your renewal log from iMIS and spot check with filters in Excel.

## Use iQA

Export your iQA full membership report again and filter to compare.

## Question your renewal data

How many members were billed?  
Any pricing not correct?  
Was anyone missed?

## Prepare to send and accept payments

Prepare your email communications and test your send.



# Let's look at the Renewal Logs and Process

**iMIS**

Community Membership Dashboard Chapters Renewals **Generate renewals** Issue notifications Reverse open invoices Manage expired members Automatic payments Billing cycles Billing products Prorating rules Fundraising Events Commerce Marketing

Keyword search

Ms. Carly Kowalski

### Generate renewals

Run billing Logs

\*Billing run name

\*Billing cycle (Select)

\*Billing type  Renewals  Rebill

\*Bill date 07/02/2022

Effective date *Anyone whose paid through date is before this date will be billed*

**AutoPay options**

- Bill all contacts
- Only bill contacts enrolled in AutoPay
- Only bill contacts NOT enrolled in AutoPay

**Other options**

- Only bill a single contact
- Only bill contacts who are included in a particular query
- Only bill contacts in a particular chapter
- Do not prorate
- Do not apply credits



# Let's look at the Renewal Logs and Process

**iMIS**

Ms. Carly Kowalski

**Community**

**Membership**

- Dashboard
- Chapters
- Renewals**
- Generate renewals**
- Issue notifications
- Reverse open invoices
- Manage expired members
- Automatic payments**
- Billing cycles
- Billing products
- Prorating rules

**Fundraising**

**Events**

### Generate renewals















Run billing **Logs**

Billing Run	Billing Cycle	Accounting Method	Billing Date	Count	Amount	Status	Batch	Generated On
January Renewal	Annual Membership - Individual	Cash	19/01/2022	2392	628,678.00	Completed		19/01/2022 17:45
Billing run for Alex Morgan	Regular Membership Fees	Cash	04/05/2021	1	265.00	Completed		04/05/2021 13:40

# Data Integrity for Membership

Michelle Lelempsis, CiSE, CiA



- Community 
  - Dashboard
  - Engagement 
  - Find contacts
  - Add contact
  - Data integrity**
  - Manage duplicates PLUS
  - Committees
  - Communities
  - Volunteers 
  - Groups
  - Import contacts
  - Security 
- Membership 
- Fundraising 
- Events 
- Commerce 
- Marketing 
- Certification 
- Finance 
- Reporting 
- Smart Suite 
- RISE 

Summary Missing data Other Duplicate checking Reference

Missing Birth Date <b>303</b>	Missing Category <b>2,457</b>	Missing Chapter <b>120</b>	Missing Company ID <b>1,413</b>
Missing Company Name <b>1,390</b>	Missing Email <b>231</b>	Missing Functional Title <b>2,448</b>	Missing Gender <b>337</b>
Missing Job Title <b>2,243</b>	Missing Join Date <b>237</b>	Missing Mobile <b>11</b>	
Missing Paid Thru Date <b>304</b>	Missing Postcode <b>13</b>	Missing Prefix <b>214</b>	
Company Name but no Parent Company <b>25</b>	Web Login Locked <b>2</b>		



# Let's create a basic data integrity report

All Members with search parameters



# Alerts and Personalisation

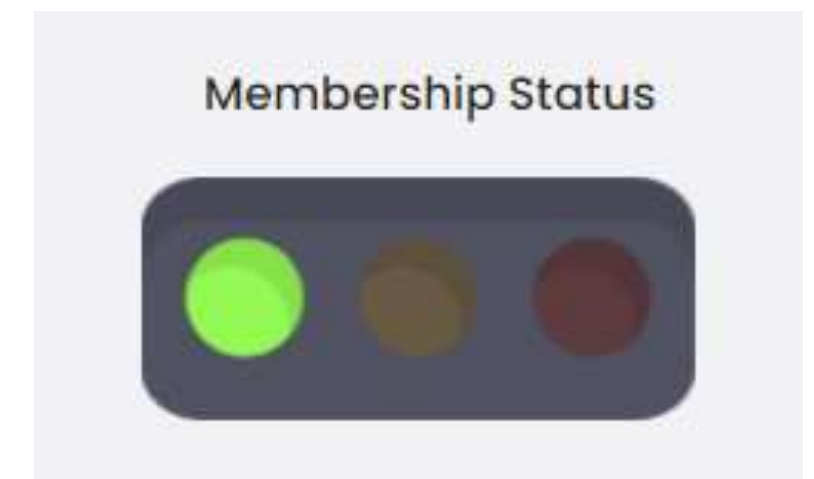
Michelle Lelempsis, CiSE, CiA





# Alerts for your Staff

- ✓ What is the status of a member?
- ✓ Has a member just joined?
- ✓ Alert for an overdue bill
- ✓ Date conflict (paid thru, renewed thru or join date)





# Alerts for your Members

- ✓ Upcoming renewal
- ✓ Welcome to new members
- ✓ Alert for expired or declined payment
- ✓ Missing data

A group of five children dressed as superheroes, standing on a beach. From left to right: a boy in a blue suit with a red mask and cape, a girl in a pink suit with a pink mask and cape, a girl in a white suit with a yellow mask and cape, a boy in a red suit with a blue mask and cape, and a boy in a green suit with a green mask and cape. They are holding large, colorful comic-style signs that say 'BAM!', 'POW', and 'BOOM'. The background is a blurred beach scene.

# Break-out Room and Discussion



# Break-out Room

- ✓ What alerts does your association have for your Staff and your Members?
- ✓ What data integrity checks do you have in place and how frequently are managing these?
- ✓ Who owns the process of billing and renewals? Have you mapped it out?

# Questions and Ideas





# Next Course: Digital Academy

## Unlocking Digital Transformation in your Association

22<sup>nd</sup> & continuing 24<sup>th</sup> February: 10am – 1pm





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