

# SOFTWARE MANUAL



ASSOCIATION MANAGEMENT ON  
THE CLOUD

**inexis**

## 1. Members

- A. Setting up your Assocify account.
  - a. Go to the settings tab.
  - b. Go to organization details.
  - c. Fill up the mandatory contact information.
  - d. Fill up the other information.
    - i. Prefix will be added to the system-generated membership number. (*Prefix: "ACTIVE"; Membership Number: "ACTIVE12345"*)
    - ii. If the members of your organization require member portal access, enable it by selecting on the icon.
- B. Check and Edit your membership forms.
  - a. Go to settings tab.
  - b. Go to custom fields.
  - c. Add new tabs into the membership forms.
    - i. Scroll down to the bottom of the page.
    - ii. Select '+ New tab'
    - iii. Type in the tab name and description, and click on add.
  - d. Edit or remove any of the fields that are not required, by clicking on the edit and remove buttons. (Name and contact information are mandatory fields therefore they cannot be removed.)
  - e. Add new fields on any of the existing forms by clicking on the '+ New Field'
    - i. Then fill up the Title, type of the information needed, select if it is a required field and click on add.
- C. Set up E-mail Automation. (These E-mails will be automatically sent through the system.)
  - a. Go to settings tab.
  - b. Go to Email Automation.
  - c. The templates and its subject can be edited.
  - d. If you do not wish to send a type of e-mail, select on the e-mail type and click on the button next to the send e-mail.
- D. Set up SMS Automation. (These SMS will be automatically sent through the system.)
  - a. Go to Settings tab.
  - b. Go to SMS Automation.
  - c. Select the SMS types required for your organizations
  - d. Click on the button next to the send SMS.

- e. Edit the SMS templates if required.
- E. Adding and configuring member levels.
- a. Add member levels.
    - i. Go to Levels tab
    - ii. Click the 'New Level' in top right Corner
    - iii. Type in the level name, fee for the level, duration of the membership, limited or unlimited and click on add.
  - b. Configuring member levels.
    - i. Go to Levels tab
    - ii. Click on the level that needs to be configured and go to 'Details & pricing'
    - iii. If required to edit the basic information of the level press the 'Edit' button at the bottom of the basic information and change the required changes and click on update. (Only the name, description and enrolment fee can be changed)
    - iv. If your organization has an approval process Switch on the Member Approval option under 'basic information'
    - v. If your organization allow members to renew the level once it's expired, scroll down to the 'Renewal settings' in the 'Details & pricing', select 'Yes, Members can renew this subscriptions' and click on update.
  - c. Edit and view communication templates for each level.
    - i. Go to Levels tab
    - ii. Click on the level that needs to be configured and go to 'Notifications'
    - iii. Select the required communications, edit the templates and click on update to save the made changes.
  - d. Delete a level. (Level cannot be deleted if at least one member is enrolled to it)
    - i. Go to Levels tab
    - ii. Click on the level that needs to be configured and go to 'Visibility'
    - iii. Select 'Deactivate' and select 'Update status'
- F. Add Member groups types
- a. Go to members tab.
  - b. Press '+ New' next to Groups in the right side bottom of the page.
  - c. Type a group name and press 'Save'.
- G. Add a member. (1.E.a, 1.E.b, 1.E.c needs to completed to add a member)

- a. Go to members tab.
- b. Select 'New Member' in the top right corner.
- c. Select if the member is an individual or an organizational member.
- d. Fill up the membership forms with the member information, then choose the membership level and group.
- e. Then update if the payment was made, if it was made select the mode of payment that was made.
- f. If the organization has an approval process the member status will be shown as 'approval pending.'

#### H. Approving and rejecting members.

- a. Go to members tab.
- b. Select on the member that to be approved or rejected.
- c. Under the member name on the left side of the screen, select if the member is approved or rejected.
- d. Adding contact categories and contacts.

## 2. Contacts

#### A. Add Contact Categories:

- a. Go to settings tab.
- b. Click contact category.
- c. Type the contact category name and press '+Add category'

#### B. Adding a contact: (I needs to be completed to add a contact)

- a. Go to Contacts tab.
- b. Select 'New Contact' in the top right corner.
- c. Fill up the Contacts form with the contact information and press Save.

## 3. Member Portal and Mobile App (For Members)

#### A. Activate this feature:

- a. Go to settings.
- b. Select the organization details.
- c. Press the button next to the 'Member portal access' and press 'update'

#### B. Members accessing the portal: (Member should be added to the system- 1.G should be completed)

- a. Member will receive an email and the member has to click on 'Click here to continue'
- b. The member can set a suitable password and sign in.

- c. The member is able to check the News and Events added by the association and edit their personal information added into the system.
- C. Members to access the Member App: (3.B Needs to be completed by the Member)
- a. Download and Install the app 'Assocify' from the App-store or the Play-store on the members mobile.
  - b. Once the app is installed go into the app and enter the organizational code that the member will receive via E-mail after they are added into the system.
  - c. Then the members should type in the E-mail (That is added to the system) and the member portal password (done in 3.B.b) to Log-in.
  - d. Members are able to check the News and Events added by the association and edit their personal information added into the system.

#### **4. News and Events**

- A. Adding News and Events: (For Association)
- a. Go to the 'News & Events' tab.
  - b. Click on the 'New News' icon in the top right corner.
  - c. Upload a picture, type in a title and a description.
  - d. Press 'Save'
- B. Checking News and Events: (For Members)
- a. Go to the 'Member portal' or the 'Assocify Mobile App'
  - b. Sign in to the member account.
  - c. Press on the 'News & Events' tab.