



RAMCO Portal

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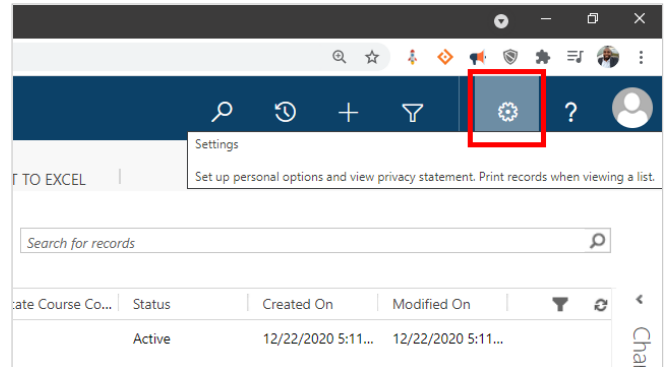
RAMCO Portal

1. Core

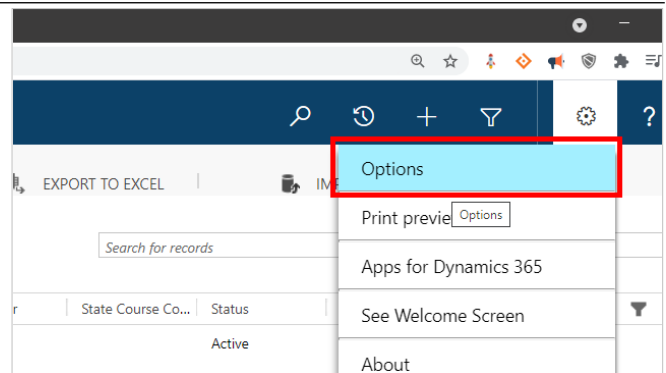
1.1. User Settings

1.1.1. Allow the System to Send Emails for You

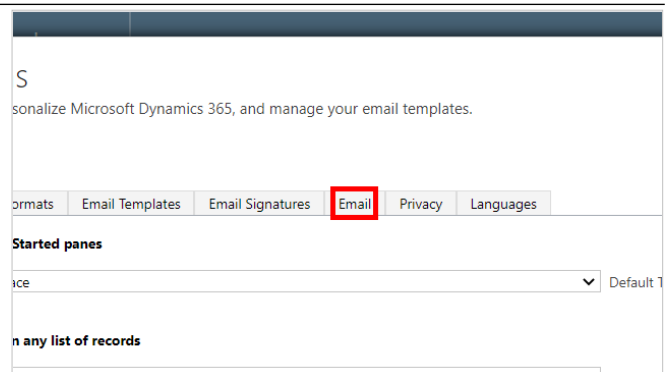
Click on the "Settings" button to open the menu



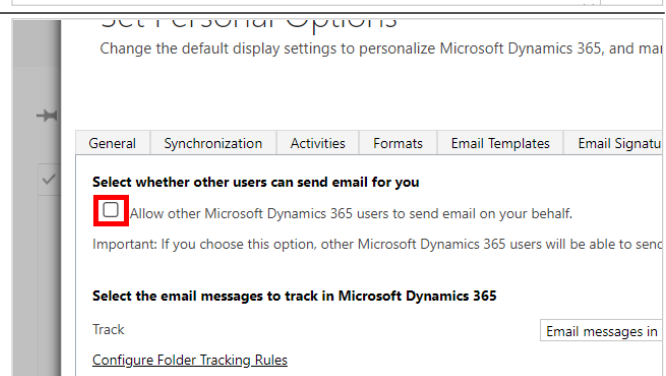
Choose Options



Click on the "Email" tab



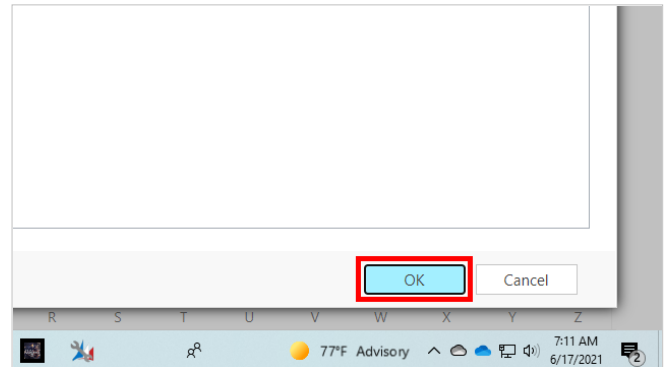
Click on the checkbox **Allow other Microsoft Dynamics 365 users to send email on your behalf.**





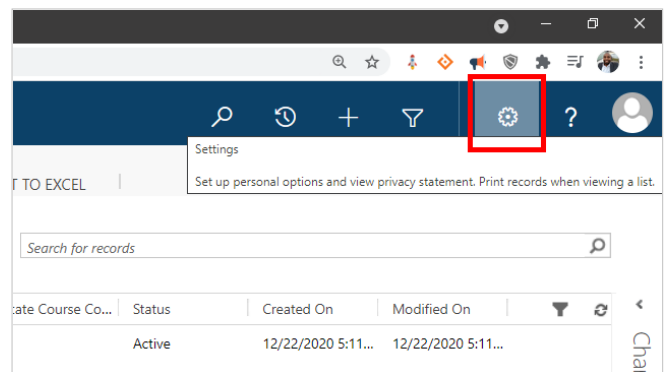
RAMCO Portal

Click Ok to close the settings window.

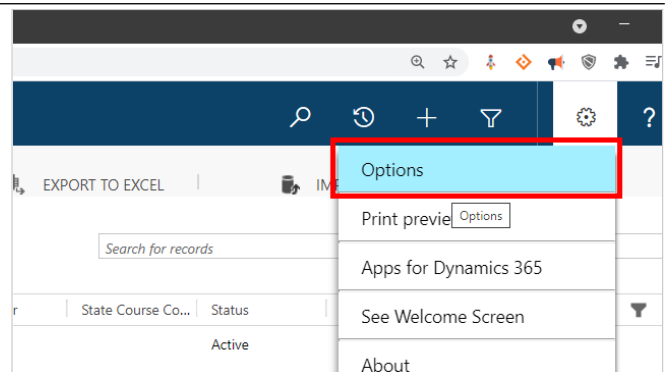


1.1.2. Increase Number of Records Per Page

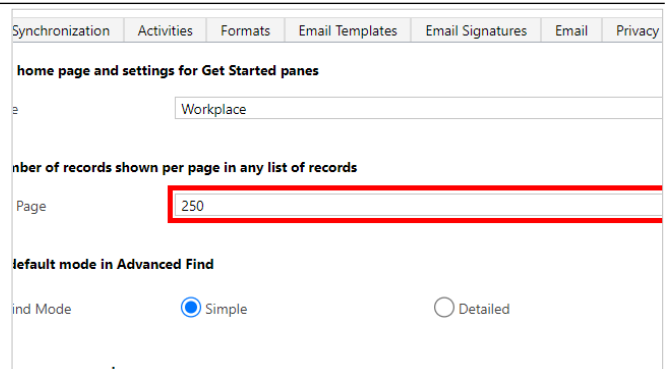
Click on the "Settings" button to open the menu



Choose Options



Click on "Records Per Page" to open the menu





RAMCO Portal

Choose the max amount of records you wish to view per page.

home page and settings for Get Started panes

Workplace

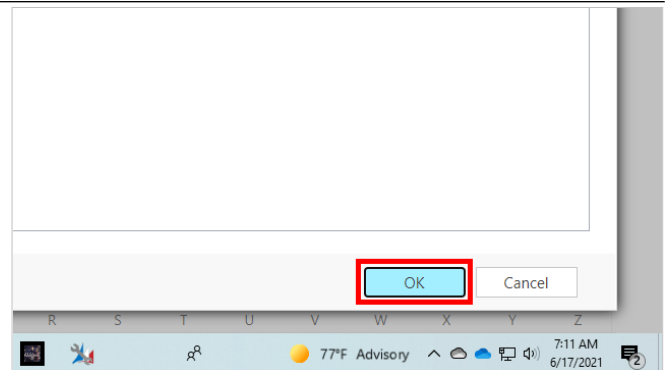
Number of records shown per page in any list of records

Page: 250

Default mode in Advanced Find Mode: 250

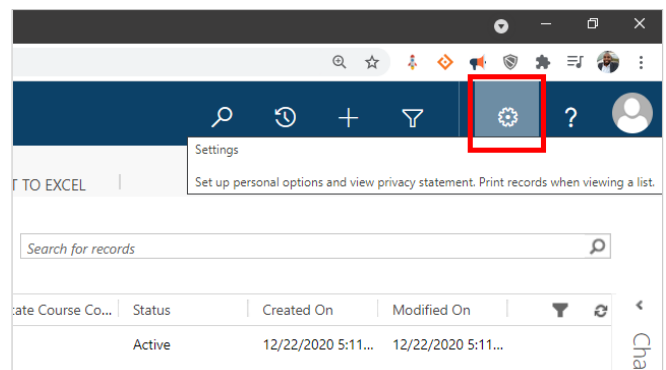
OK Cancel

Click Ok to close the settings window.

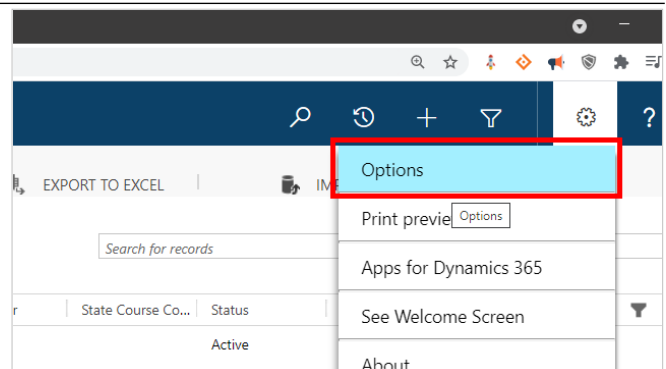


1.1.3. Set Advanced Find Mode to Detailed

Click on the "Settings" button to open the menu



Choose Options





RAMCO Portal

Choose "detailed"

shown per page in any list of records

250

Advanced Find

☒ Simple ☐ Detailed

in

(GMT-05:00) Eastern Time (US & Canada)

Click Ok to close the settings window.

OK Cancel

1.1.4. Set Your RAMCO Home Page

Click the "Settings" icon to open the menu

Settings

Set up personal options and view privacy statement. Print records when viewing a list.

Choose "Options" from the Menu

Options

Print preview

Apps for Dynamics 365

See Welcome Screen

About



RAMCO Portal

Click on the "Default Pane" field to open the menu

the default display settings to personalize Microsoft Dynamics 365, and manage your email templates

Synchronization	Activities	Formats	Email Templates	Email Signatures	Email	Privacy
-----------------	------------	---------	-----------------	------------------	-------	---------

home page and settings for Get Started panes

Workplace

number of records shown per page in any list of records

Page 250

default mode in Advanced Find

Choose an area from the list

Synchronization	Activities	Formats	Email Templates	Email Signatures	Email	Privacy
-----------------	------------	---------	-----------------	------------------	-------	---------

home page and settings for Get Started panes

Workplace

<Default based on user role>

Workplace

number of records shown per page

Membership

Events

Sales & Accounting

Elections

Marketing

Service

Settings

Training

default mode in Advanced Find

Find Mode

the zone you are in

Click on the "Default Tab" field to open the menu

Courses

Choose an "Entity" from the list to become your new RAMCO home page

Courses

Accounts

Contacts

Dashboards

Activities

Reports

Data Management

Memberships

Committees

Dues Cycles

Courses

Classes

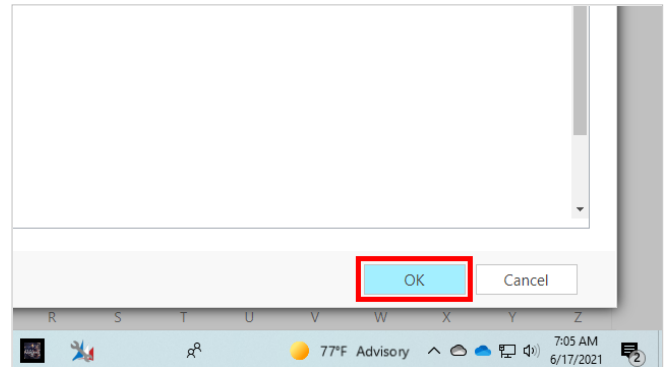
Meetings

Products



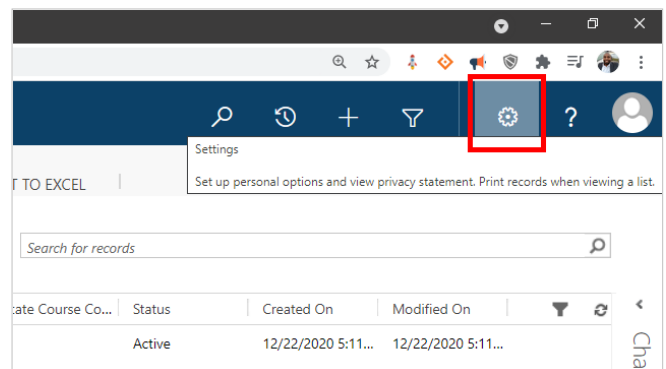
RAMCO Portal

Click OK to close the settings menu

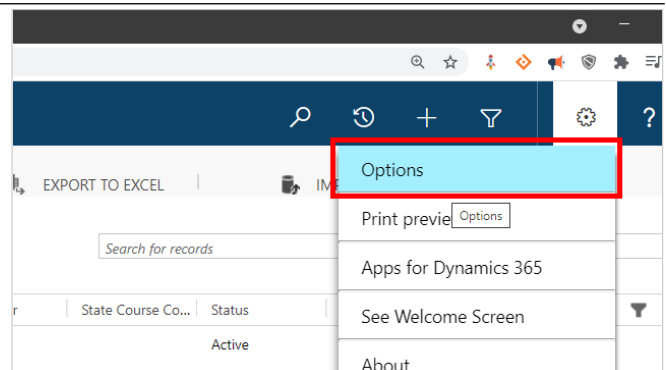


1.1.5. Set Your Time Zone

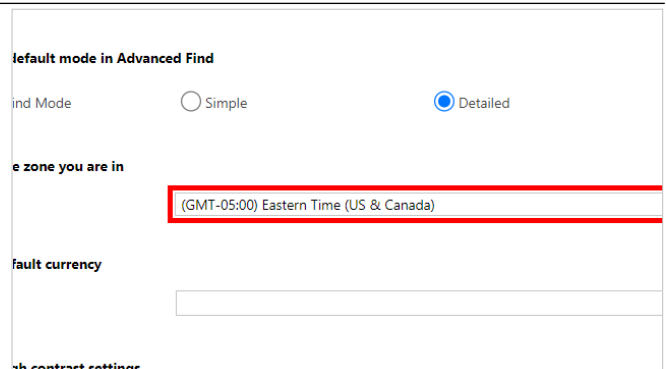
Click on the "Settings" button to open the menu



Choose Options



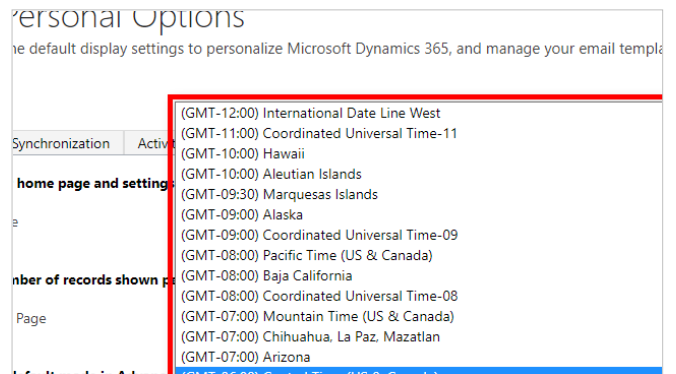
Click on the "Time Zone" field to open the menu.



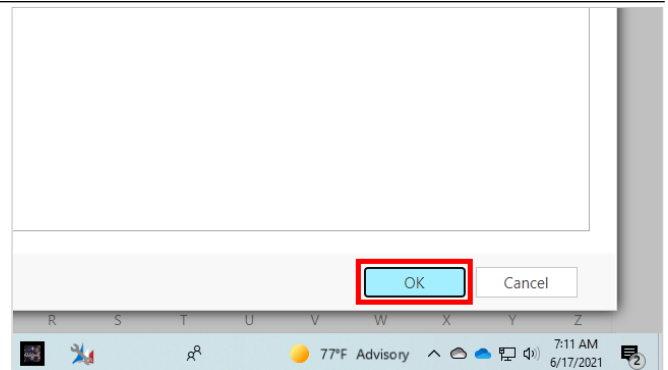


RAMCO Portal

Choose your desired time zone.

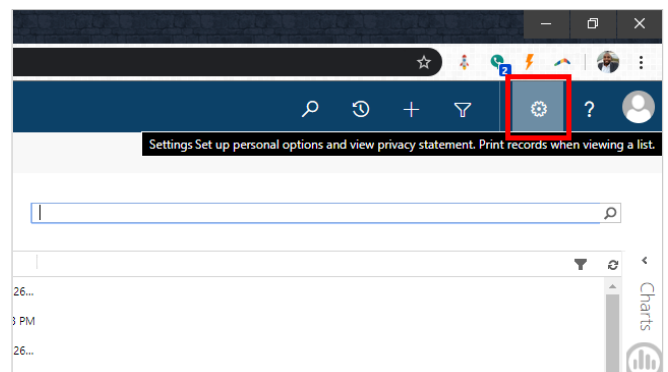


Click Ok to close the settings window.

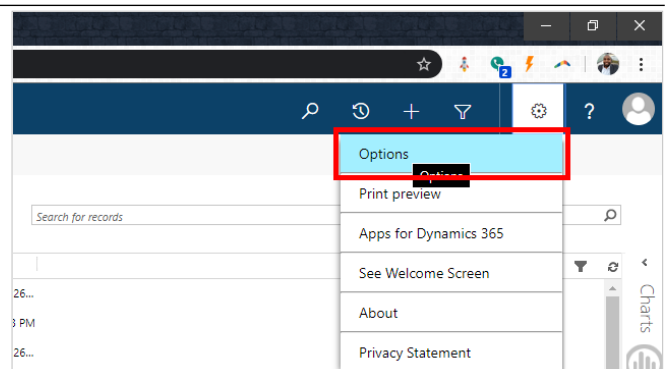


1.1.6. Update User Settings

Click on the Gear Icon to Access the Settings Menu



Select Options from the settings menu





RAMCO Portal

Click on the combo box **Default Pane**

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane Workplace Default Tab

Select the number of records shown per page in any list of records

Records Per Page 250

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed

Select a Default Pane

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane Workplace Default Tab

Select the number of records shown per page in any list of records

Records Per Page 250

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed

Click on drop down field for Default Tab

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane Workplace Default Tab

Select the number of records shown per page in any list of records

Records Per Page 250

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed

Select a Default Tab

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane Workplace Default Tab

Select the number of records shown per page in any list of records

Records Per Page 250

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed



RAMCO Portal

Click on the combo box **Records Per Page**

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane Workplace Default Tab

Set the number of records shown per page in any list of records

Records Per Page 250

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed

Set the time zone you are in

Time Zone (GMT-05:00) Eastern Time (US & Canada)

Select the desired records per page. RAMCO recommends the maximum of 250 records per page.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane Workplace Default Tab

Set the number of records shown per page in any list of records

Records Per Page 250

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed

Set the time zone you are in

Time Zone (GMT-05:00) Eastern Time (US & Canada)

Click the Tab Email

Options

Settings to personalize Microsoft Dynamics 365, and manage your email templates.

Activities Formats Email Templates Email Signatures Email Privacy Languages

Settings for Get Started panes

Workplace Default Tab Contacts

Records per page in any list of records

Click on the checkbox **Allow other Microsoft Dynamics 365 users to send email on your behalf.**

o, Remmy

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365

General Synchronization Activities Formats Email Templates

Select whether other users can send email for you

☐ Allow other Microsoft Dynamics 365 users to send email on your behalf

Important: If you choose this option, other Microsoft Dynamics 365 users will be able to send email on your behalf.

Select the email messages to track in Microsoft Dynamics 365

Track Email messages in

Configure Folder Tracking Rules

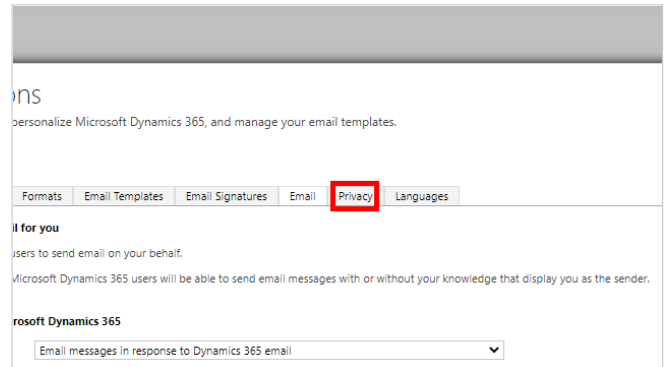
Automatically create records in Microsoft Dynamics 365

☒ Create

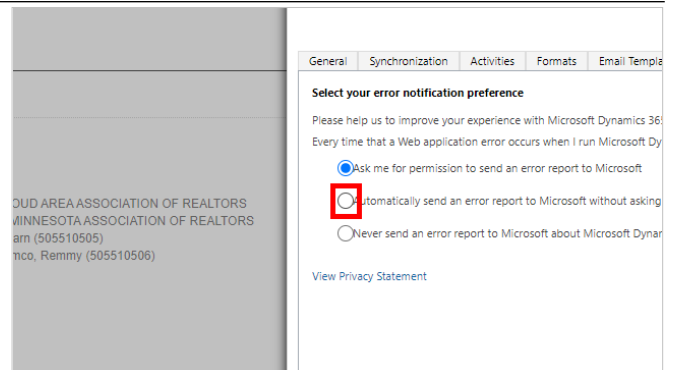


RAMCO Portal

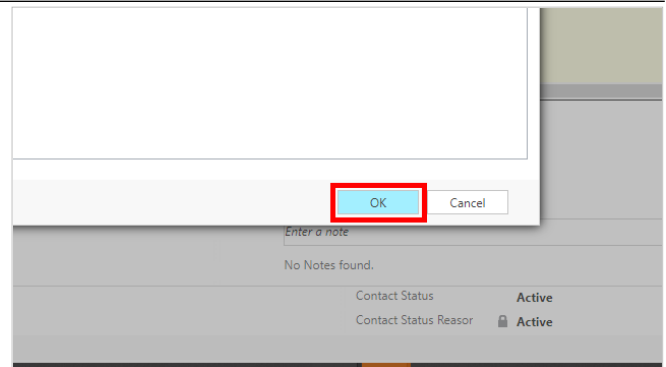
Click on the Privacy Tab



Click on the radio button **Automatically send an error report to Microsoft without asking me for permission**



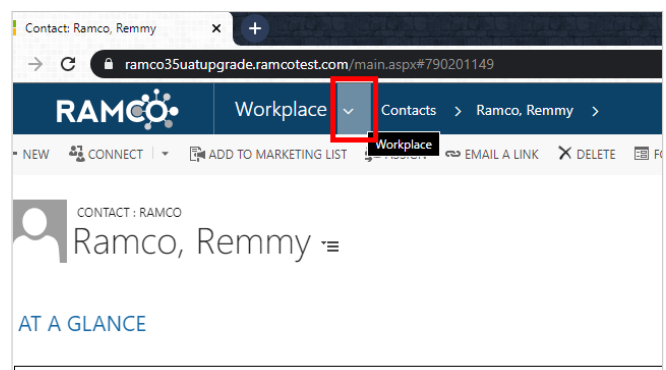
Click on the button **OK**



1.2. Core (Advanced)

1.2.1. Resetting Passwords

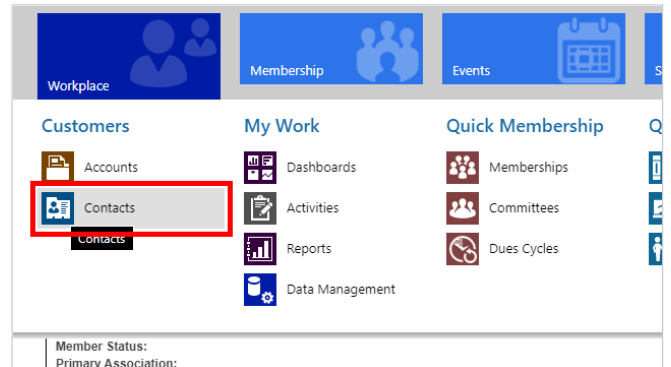
Open the Navigation Areas



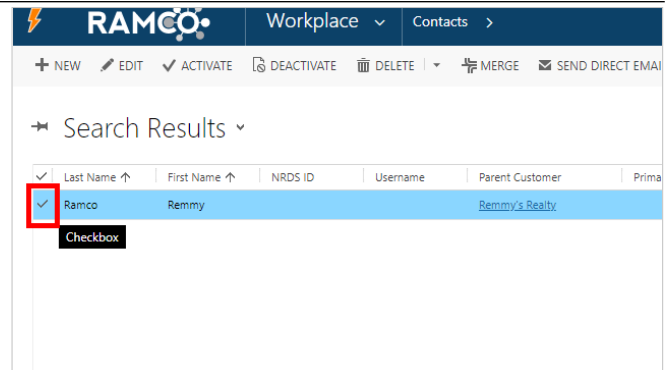


RAMCO Portal

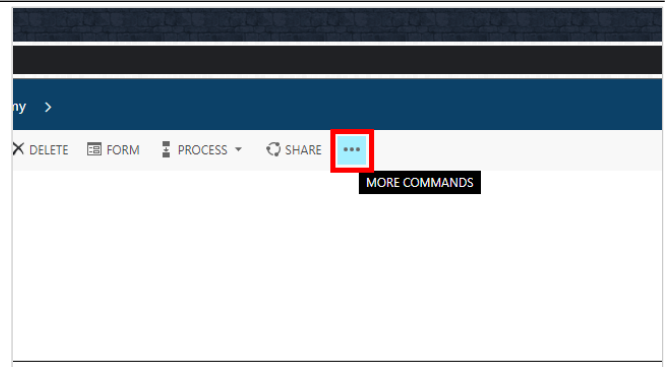
Click on the "Contacts" entity.



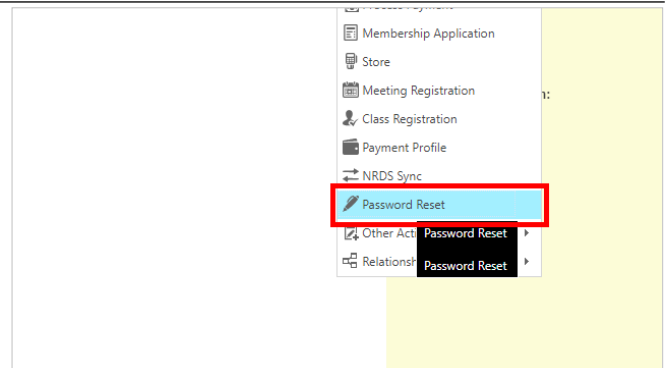
Open the contact record to have their password reset.



Click on the command button **MORE COMMANDS**



Click on the command button **Password Reset**





RAMCO Portal

Click on the button **Submit**

Update Required" field to Yes so they are required to change

Full Name
2019 Annual, Reggie

Cancel Submit

Click on the link **Close**

the Contact at the address shown

the password field and set the "Password" field to the new password

Close

Click on the field **Password**

Manager

WEB PORTAL DETAILS

Username --

Password --

Password Update Date --

Password Update Required No

Password Reset URL --

Last Portal Login --

Last Profile Update --

Profile Update Form Response --

Enter the new password.

Manager

WEB PORTAL DETAILS

Username --

Password --

Password Update Date --

Password Update Required No

Password Reset URL --

Last Portal Login --

Last Profile Update --

Profile Update Form Response --



RAMCO Portal

Change the field "Password Update Required" to force the member to update their password upon login.

WEB PORTAL DETAILS

Username	--
Password	newpassword
Password Update Date	--
Password Update Required	No
Password Reset URL	--
Last Portal Login	--
Last Profile Update	--
Profile Update Form Respon	--
E-mail Verified	No
Terms & Conditions Accepte	No

Click Save to complete the process.

Contact Status Active

Contact Status Reason Active

Save

1.2.2. Saving a Credit Card for Future Use (Payment Profile)

Open the Navigation Areas

Contact: Ramco, Remmy

ramco35uatupgrade.ramcotest.com/main.aspx#121179613

RAMCO Workplace

NEW CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK X DELETE

CONTACT : RAMCO Ramco, Remmy

AT A GLANCE

Click on the "Contacts" entity.

Workplace Membership Events

Customers My Work Quick Membership

Accounts Dashboards Memberships

Contacts Activities Committees

Reports Dues Cycles

Data Management

Member Status: Primary Association:



RAMCO Portal

Select a contact to add credit card info for.

Click on the command button **MORE COMMANDS**

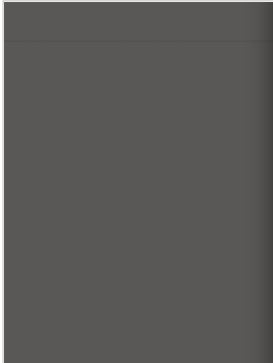
Click on the command button **Payment Profile**

Choose the credit card type.



RAMCO Portal

Enter Credit Card Details



Credit Card Terminal Output (optional)

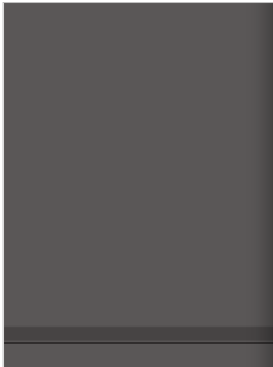
Card Type
Visa

Card Number

Expiration Date (MM/YYYY)

Security Code (CVW/CV2)

Set the Expiration Month



Card Type
Visa

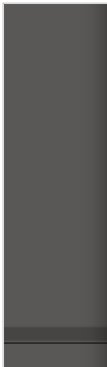
Card Number
*****1111

Expiration Date (MM/YYYY)
June 2024

Security Code (CVW/CV2)

Billing Address
☒ None - Enter Address ☐ Home Address

Set the Expiration Year



Card Type
Visa

Card Number
*****1111

Expiration Date (MM/YYYY)
June 2024

Security Code (CVW/CV2)

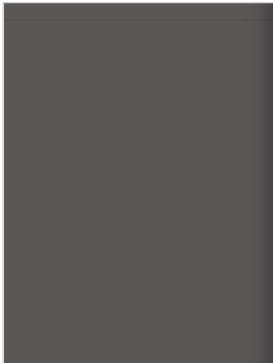
Billing Address
☒ None - Enter Address ☐ Home Address ☐ Mailing Address

First Name
Remmy

Last Name
RAMCO

☒ Save this card to

Enter the card security code.



Card Number
*****1111

Expiration Date (MM/YYYY)
June 2024

Security Code (CVW/CV2)

Billing Address
☐ None - Enter Address ☒ Home Address

Street Address 1 [optional]

Security Code (CVW/CV2) is a required field.



RAMCO Portal

Input the Cardholder's Name

First Name
Remmy

Last Name
RAMCO

☒ Save this card to my profile

Input the Cardholder's Last Name

First Name
Remmy

Last Name
RAMCO

☒ Save this card to my profile

Set the billing address to be used with this card.

Billing Address

☒ None - Enter Address ☐ Home Address ☐ Mailing Address

Street Address 1
123 Elm Street

State
Kansas

Street Address 2 [optional]

Zip Code
12345

Click on the button **Update Profile**

Street Address 1 [optional]
123 Elm Street

Street Address 2 [optional]

City [optional]
Oz

State [optional]
Kansas

Zip Code [optional]
12345

Country [optional]
United States



RAMCO Portal

Click the button "Update Profile" to store the credit in eCommerce.

Street Address 2 [optional]

City [optional]

Chicago

Update Profile

1.2.3. Add Meal Choice Question to a Class Registration Fee

Open the Navigation Areas

RAMCO Workplace Contacts

Workplace

Contacts

Workplace

DELETED EMAIL A LINK RUN REPORT EXCEL TEMPLATES

Active Contacts

First Name Parent Customer Email Mobile Phone

Choose the Settings area

ClickLearn

Service Settings Training

Extensions

Lockboxes Keys

Choose the Forms entity

Workplace Membership Events

Content Process Center Business

Page Text Processes Business Management

Forms Templates

Report Texts Product Catalog

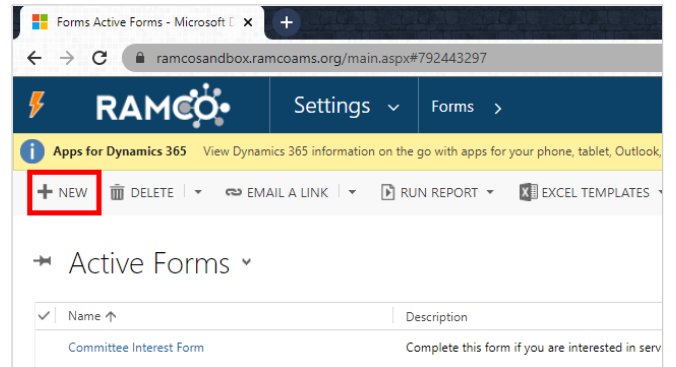
Report Text Purchase Orders

Alerts

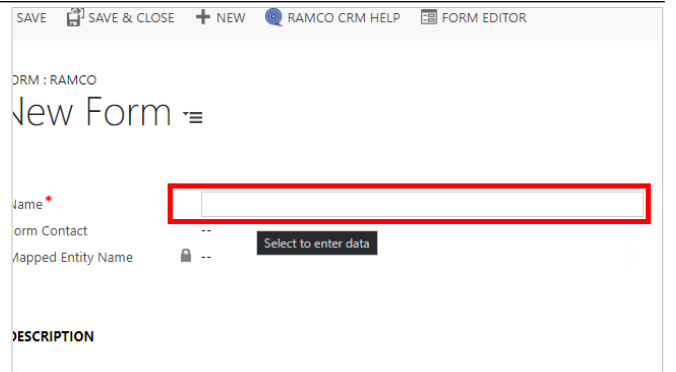


RAMCO Portal

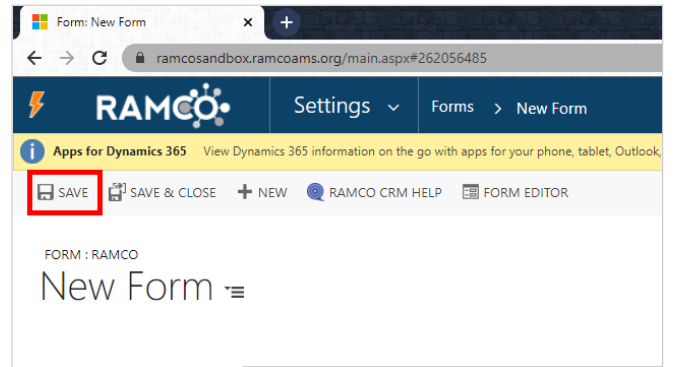
Click on the command button **New**



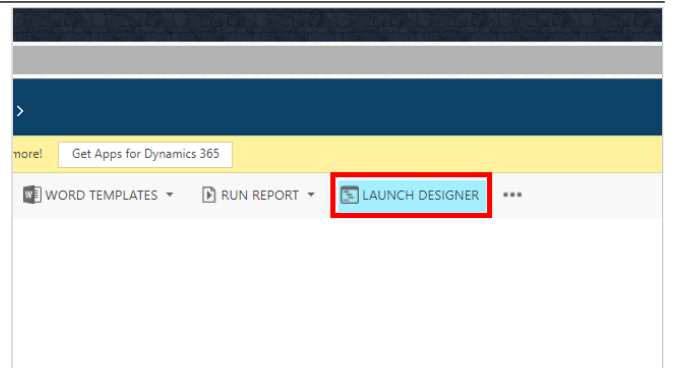
Give the Form a name



Click on the command button **Save**



Click on the command button **Launch Designer**





RAMCO Portal

Form must be configured for the process you plan to use it in.

Choose Class Registration.

s or types, select an entity from the related list.

...or Select a Related Entity [optional]

Click on the button **Configure Form**

Note: For forms that are associated with application fees or type

Select an Entity [optional]

Save and Close Configure Form

Use the "Add Controls (Unmapped)" menu to choose an unmapped field.

Unmapped means when a person answer the question, we simply save their answers to read later.

The alternative to unmapped questions are "Mapped" questions. These fields will update the members data once answered. For example, if a member answers and email question, their email in RAMCO will be changed.

How many years have you held a membership to a local REALTOR association? (edit...)

Select Page

Page 1

New Page Edit Page... Delete Page

Add Controls (Unmapped)

Add Control Add Section

Add Fields (Mapped)

ramco_formresponse_committeemir

When asking about meal preference, there is no place to update that in RAMCO, so we ask it as an Unmapped question.

Choose Static Option Set (Picklist).

Add Controls (Unmapped)

Single Line Text (nvarchar)

Single Line Password (nvarchar masked)

Phone Number (country / phone)

Static Option Set (picklist)

Dynamic Option Set (picklist)

Static Multi-Select (checkboxes)

Static Two Options (bit)

Dynamic Two Options (bit)

Whole Number (int)

Floating Point Number (float)

Decimal Number (decimal)

Currency (money)

Multiple Lines of Text (text)



RAMCO Portal

Click on the button **Add Control**

The screenshot shows the top right corner of the RAMCO Portal interface. It includes buttons for 'New Page', 'Edit Page...', and 'Delete Page'. Below these is a section titled 'Add Controls (Unmapped)' with a dropdown menu set to 'Static Option Set (picklist)'. The 'Add Control' button is highlighted with a red rectangle. Below this is a section titled 'Add Fields (Mapped)' with a dropdown menu showing 'cobalt_cobalt_formresponse_cobalt_cla'.

Now that the blank question is on the form, we must now configure the question.

Click Edit

The screenshot shows a configuration window for 'Section 1 (edit...)'. It contains a button labeled 'Click to configure (edit...)' which is highlighted with a red rectangle. Below this button is a 'Save and Close' button.

Since are asking a meal choice question, we will need to add several choices for the person to choose from.

Click "Add Answer" to add an option.

Repeat this for as many choices you would like to offer.

The screenshot shows the 'Answers' section of the configuration window. It displays a message 'Your search returned no results.' and an 'Add Answer' button, which is highlighted with a red rectangle. Below this is a section for '+ Advanced Options' with buttons for 'Cancel', 'Delete Question', and 'Save Ques'.

Add the name of the meal choice here.

The screenshot shows the 'Answers' section of the configuration window. It displays a table with a header 'Name' and several empty input fields. The first input field is highlighted with a red rectangle.



RAMCO Portal

Then add it again here.

Repeat this for all the meal choices you plan to offer.

Name	Value	
Chicken	<input type="text"/>	1
<input type="text"/>	<input type="text"/>	2
<input type="text"/>	<input type="text"/>	3
<input type="text"/>	<input type="text"/>	4

Once all the meal choices have been added, click save

1	<input type="text"/>	Save	Delete
2	<input type="text"/>	Save	Delete
3	<input type="text"/>	Save	Delete
4	<input type="text"/>	Save	Delete

4 items in 1 page

Once satisfied with your question, click Save Question

1 Page Size: 10

Add Answer

+ Advanced Options

Cancel Delete Question Save Question

Once satisfied with your form, click Save and Close

Meal Choice

Section 1 (edit...)

What is your meal preference? (e

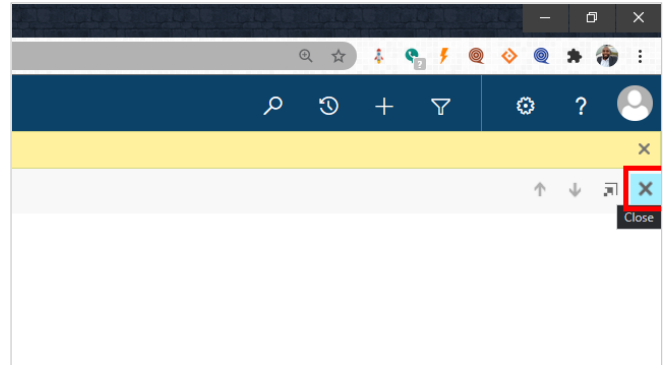
Save and Close



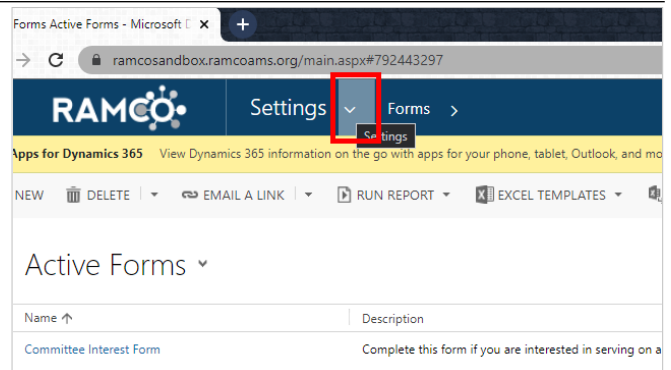
RAMCO Portal

Now that you have created your question(s), we must attach them to the class registration fee.

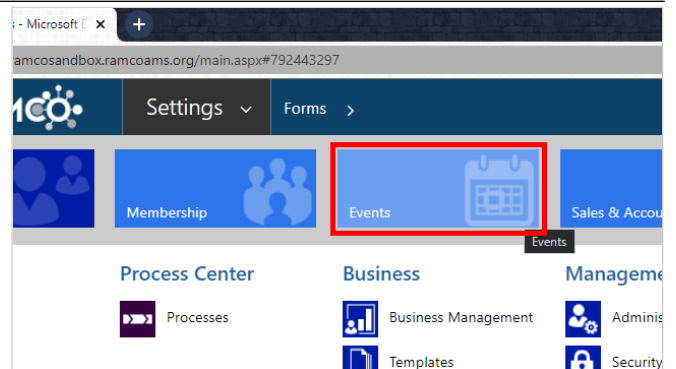
Let's close this record for now.



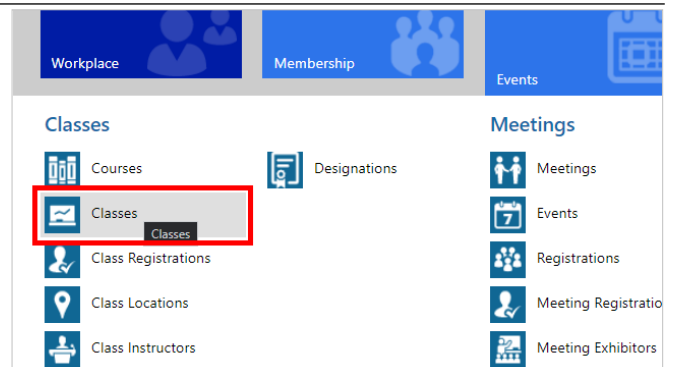
Once again open the Navigation areas.



Go to the Events area



Choose the Classes entity.





RAMCO Portal

Find the class you wish to add the questions, then open it.

✈ Active Classes ▾

✓	Name	Course	Current Registrations	Max
	DM - AEI Meeting 2018 - RAMCO Pr...	DM - AEI Meeting 2018 - ...		2
	test Class 3	test Course 5		
	Test Class 01	Test Course 1	1	
	new Test Class 3	Technology Course 101		
	Example Class - With Documents	Technology Course 101	1	
	oRIENTATION	Test Course 1	2	
	Code of Ethics	Code of Ethics	2	
	RAMCON COE Class	Code of Ethics		
	COE AT RAMCON	Code of Ethics		

Form questions must be attached to a registration fee.

Choose the registration fee that will ask these questions.

If you want all or several registrations fees to ask the same questions you may select all of them.

REGISTRATION FEES

Name ↑	Product
Code of Ethics	Early Bird
Code of Ethics	Code of Ethics

Modified On 6/19/2020 10:01 AM
Modified By SYSTEM

Add our newly created form to the "Form" field.

Name *	Code of Ethics
Class *	Code of Ethics
Product *	Early Bird
Cancellation Fee	--
Begin Date *	10/1/2019 12:00 AM
End Date *	11/1/2020 12:00 AM
Form	MikeC - Form Test with Links
Publish to Portal	Yes
Sort Order	--

Click Save to complete the process.

Now when someone registers with this fee, they will be asked the questions included in our form

status Active

status Reason Active

unsaved changes

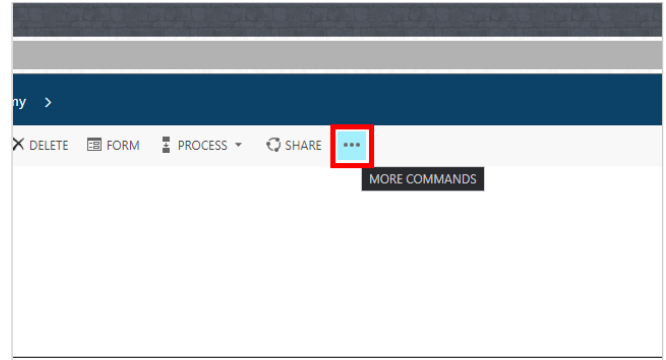
8:48 AM 7/14/2020



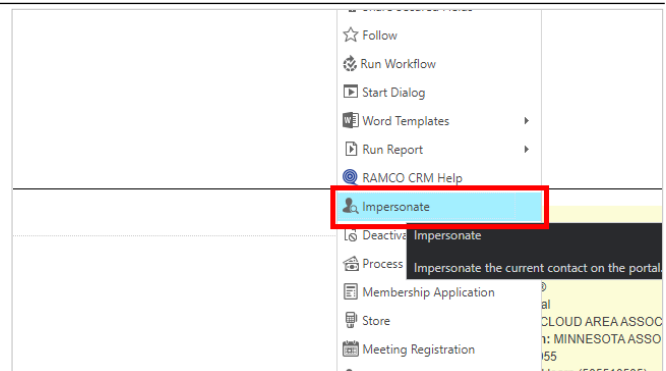
RAMCO Portal

1.2.4. Log into Portal as Member

Click on the command button **MORE COMMANDS**



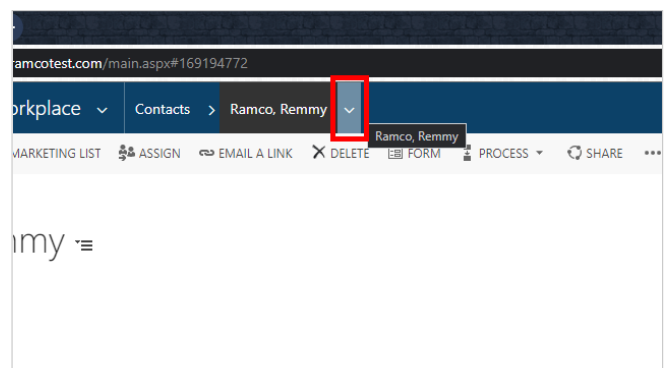
Click on the command button **Impersonate**



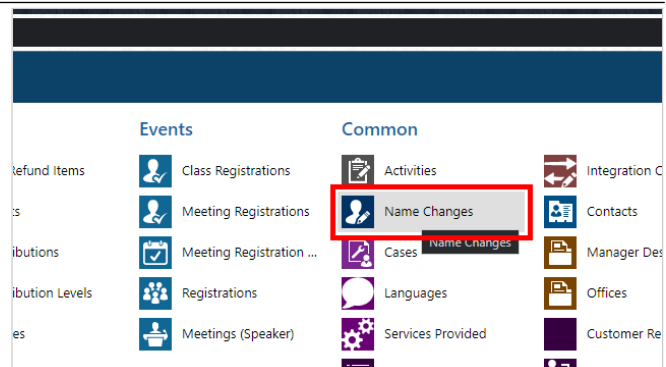
Please restart this assist from a Contact record.

1.2.5. Performing a Name Change

Click on the "View Related" button.



Click on the entity "Name Changes".





RAMCO Portal

1. Enter the new name.

CURRENT NAME

Prefix	Mr.
First Name *	Remmy
Middle Name	A
Last Name *	R
Suffix	--

Click on the command button **Run Workflow**

NAME CHANGE: Ramco, Remmy to Ramco, Remmy - Google Chrome

RAMCO

Run Workflow

Run a workflow for this Name Change.

View the status of workflows in the Workflow

Select the "Approve Name Change" workflow.

Reason

Approved By

Approved On

Enter your search criteria.

Look for

Look in

Search

Process Name

Category

Approve Name Change

Workflow

Checkbox

Click on the button **Add**

1 - 1 of 1 (1 selected)

Add

Cancel

Remove Value

3/26/2020 1:48 PM

Modified On

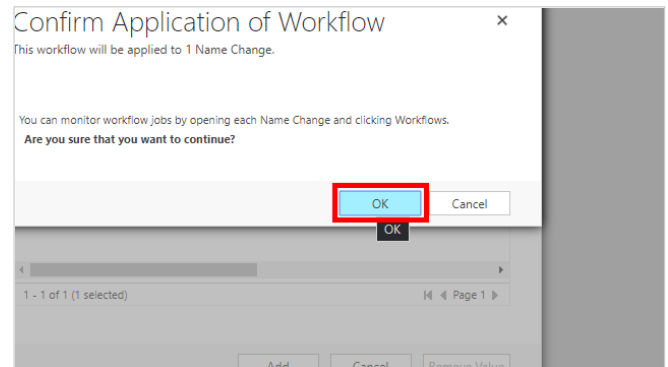
3/26/2020 1:48 PM

Status



RAMCO Portal

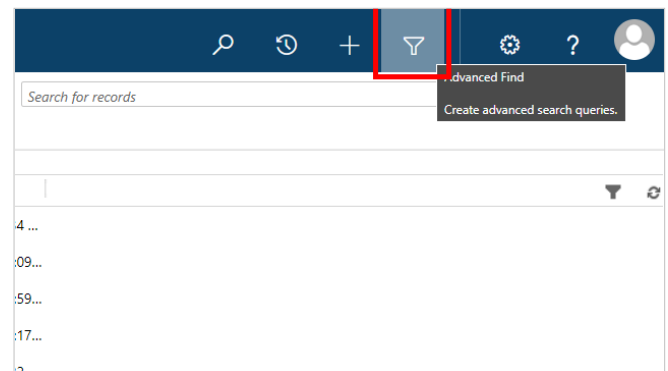
Click on the button **OK**



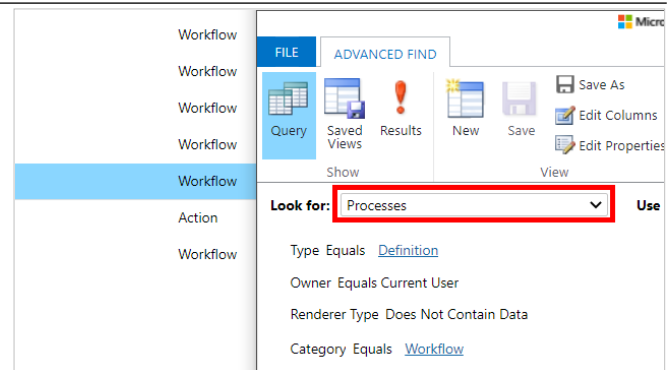
1.3. Advanced Finds

1.3.1. Create an Advanced Find

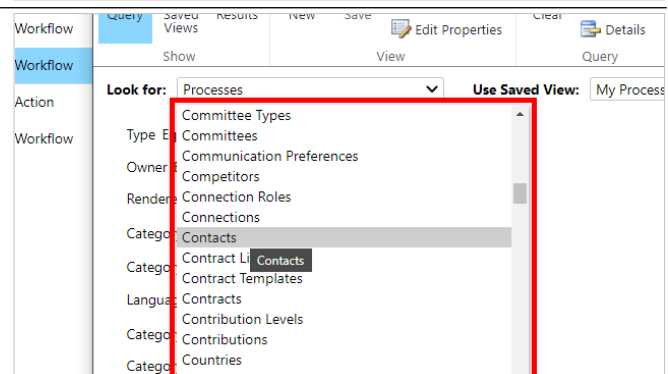
Click the Funnel icon in the Navigation Bar



Click the "Look For" dropdown menu, and set it to contacts



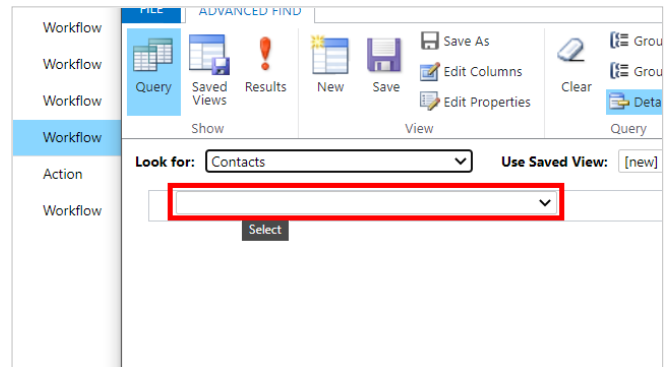
Click on the item **Contacts** in the list



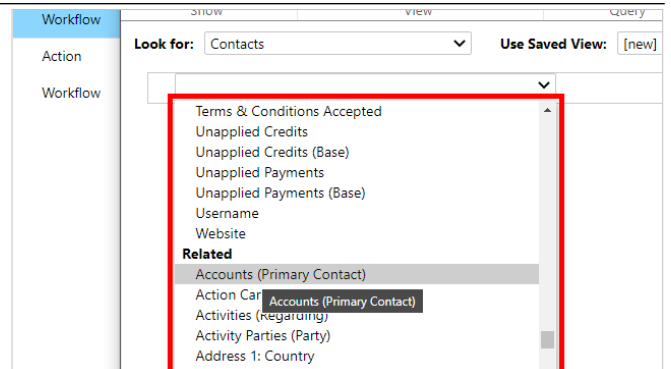


RAMCO Portal

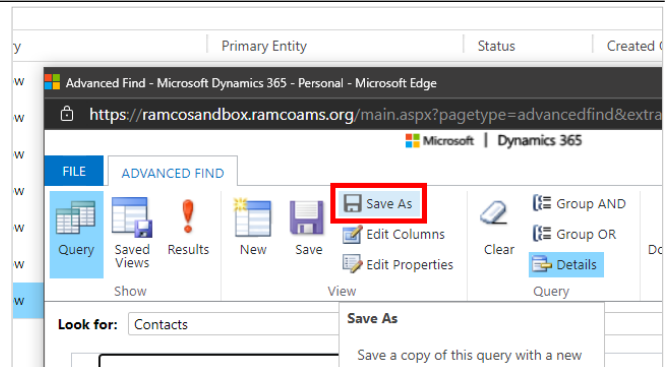
Click on the select button, if you do not see this button, toggle the details button in the ribbon.



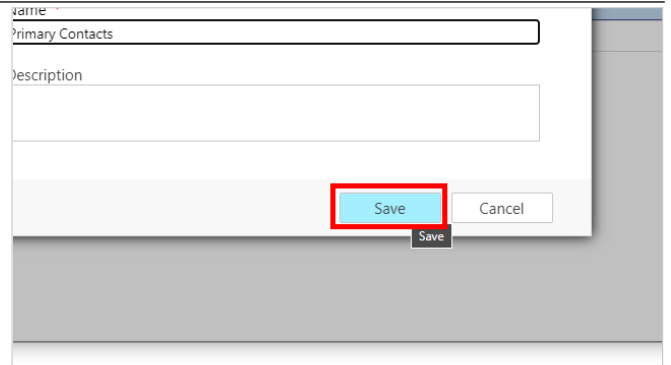
Click on the item **Accounts (Primary Contact)** in the list



Click Save, then give your Advanced Find a name



Click on the button **Save**



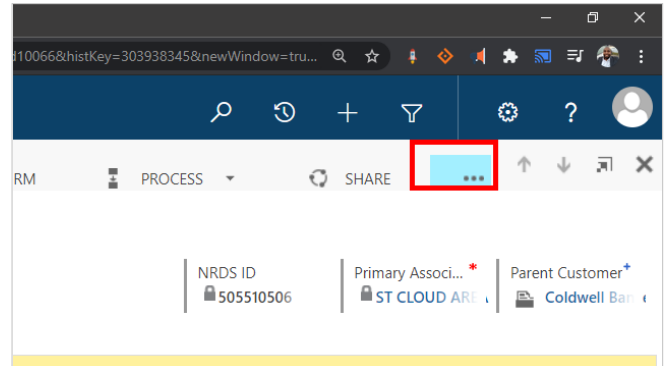


RAMCO Portal

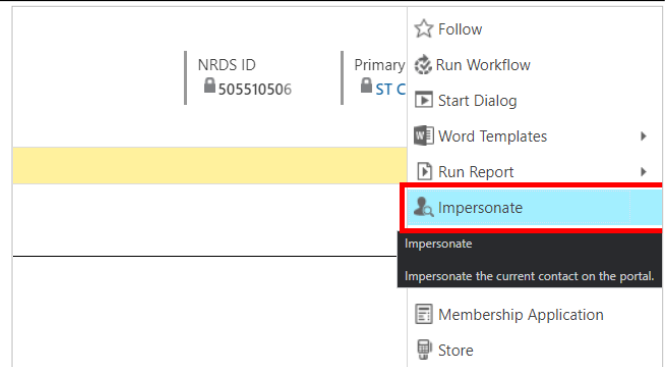
1.4. Page Text

1.4.1. Identify and Update Page Text on the Portal

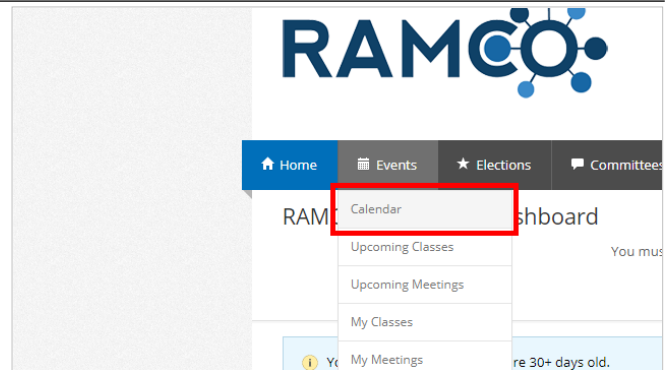
Click on the command button **MORE COMMANDS**



Click on the command button **Impersonate**



Find the page on the portal where you want your new messaging to appear.

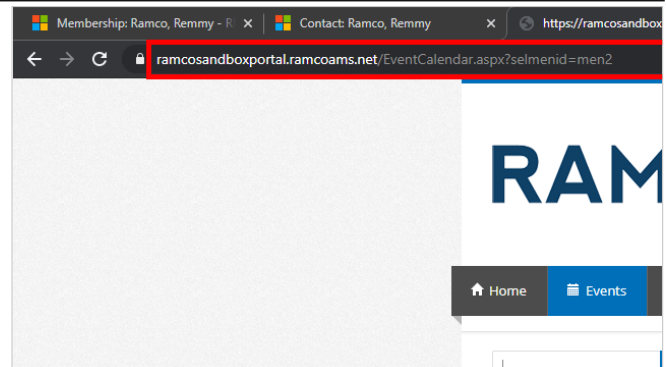


Click in the URL to highlight it.

Then copy a portion of the URL, from the first forward slash "/" all the way through the ".aspx".

Anything after the ".aspx" must not be copied.

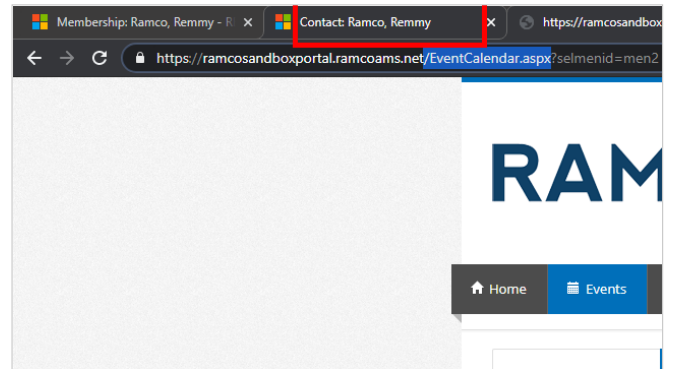
Once you have the URL copied, we will use this to find this page text record in RAMCO.



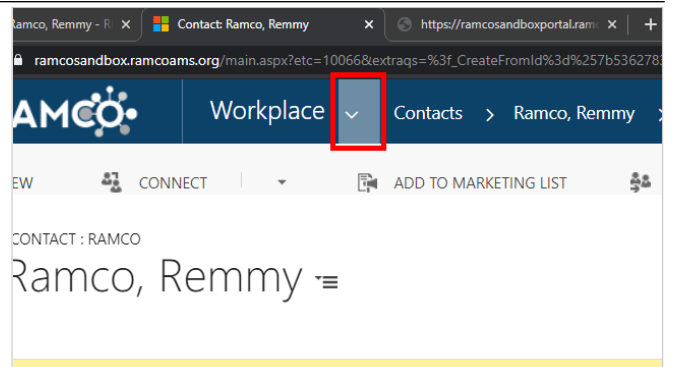


RAMCO Portal

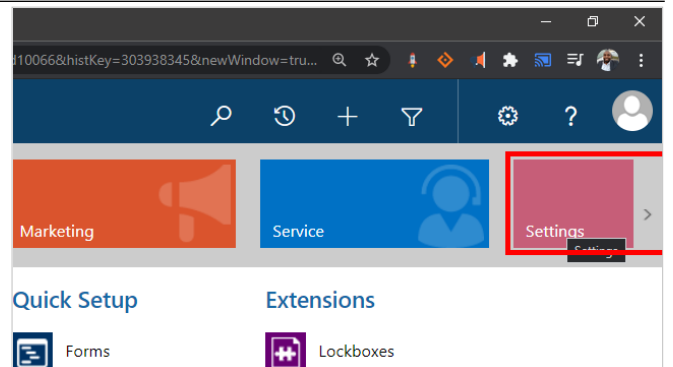
Click on the tab to return to RAMCO



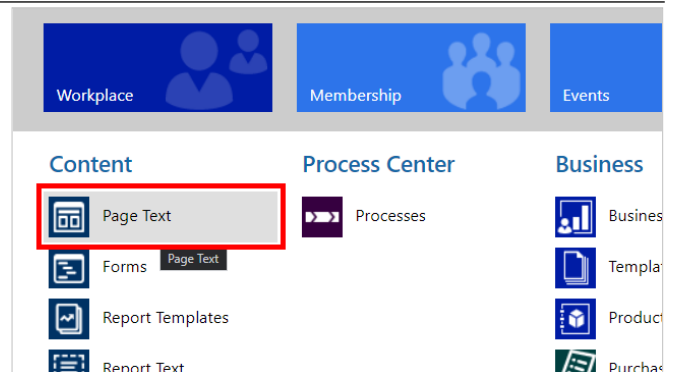
Open the Navigation Areas



Go to the Settings area



Choose the Page Text entity






RAMCO Portal

Paste the URL in the search box and press enter.

This should reveal the correct page text record. If the search does not work, you can always make a new one.



The screenshot shows a web browser window. The address bar at the top contains a URL starting with '0%257d%26_CreateFromType%3d1024%26etc%3d10066&histKey=303938345&newWindow=tru...'. Below the address bar is a dark blue header with a magnifying glass icon and a circular arrow icon. The main content area is white and contains a search bar with the text 'Search for records' highlighted by a red rectangle. Below the search bar is a table with two columns: 'Created On' and 'Modified On'. The table has two rows of data, both showing the date '8/11/2017 12:51...'. The text 't below.' is visible to the left of the table.

Click on the command button **New**

Paste your URL in the URL field.

TEXT : RAMCO

New Page Text

Title

--

--

Select to enter data

Give your page a title. This will show as the title of the page tab.

SAVE SAVE & CLOSE NEW FORM EDITOR

TEXT : RAMCO

New Page Text

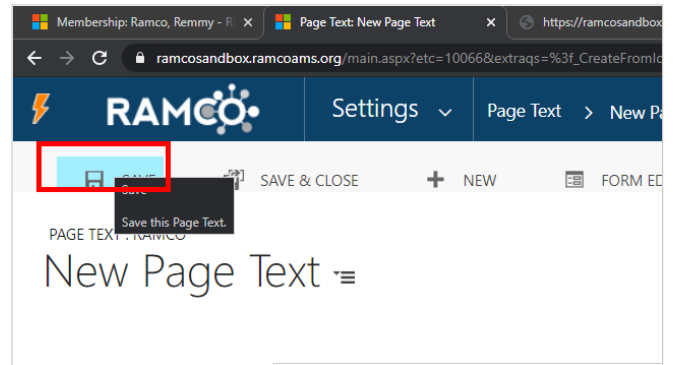
Title

EventCalendar.aspx

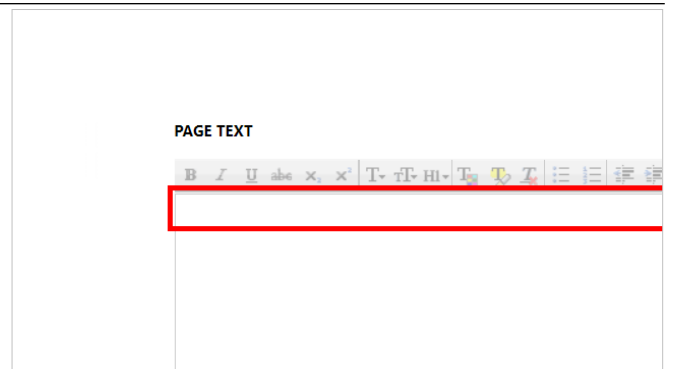


RAMCO Portal

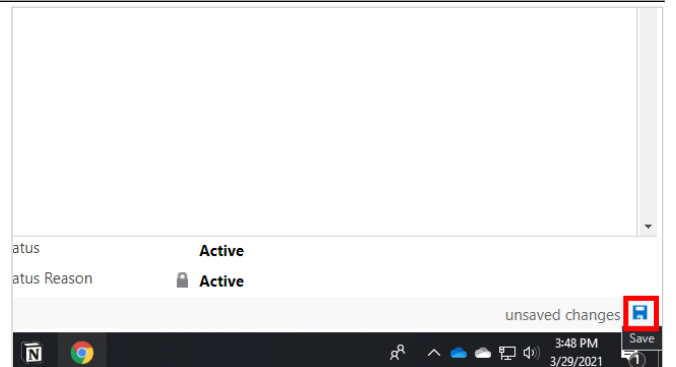
Click on the command button **Save**



Then enter your desired messaging in the Text box.



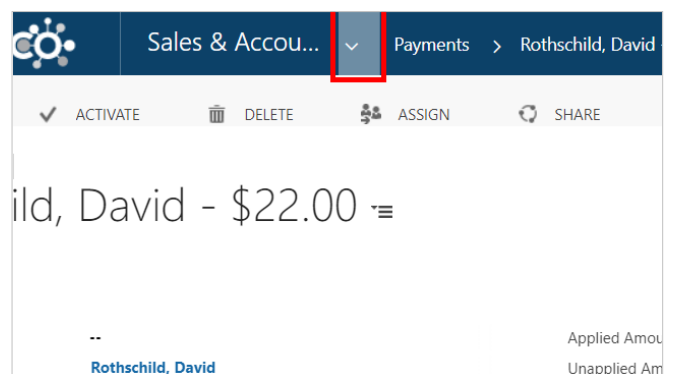
Click save to complete the process. This message will now show on this page of your member portal.



1.5. Automation

1.5.1. Create an Alert (CRM or Portal)

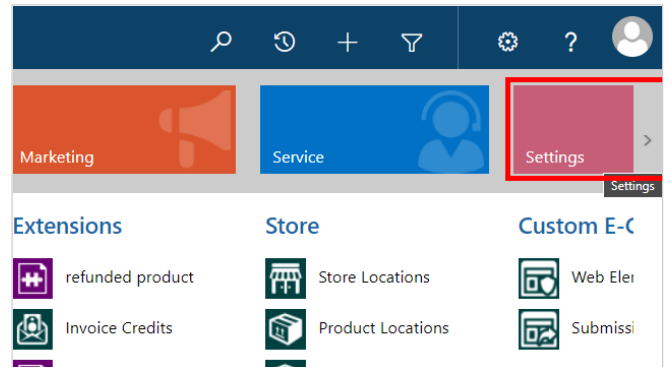
Open the Navigation Areas



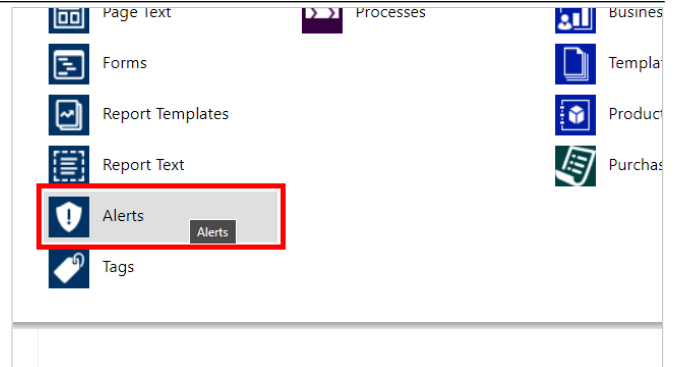


RAMCO Portal

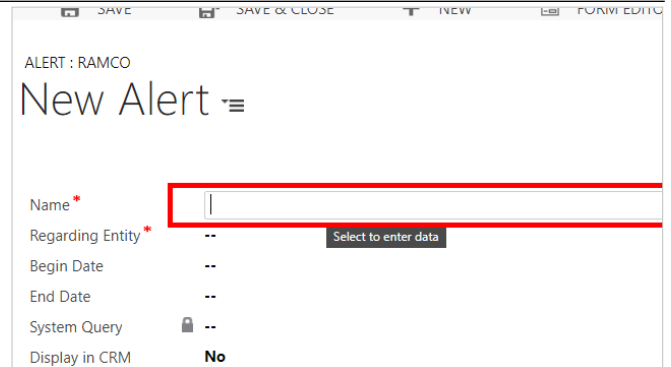
Choose the Settings Area



Click on the link **Alerts**



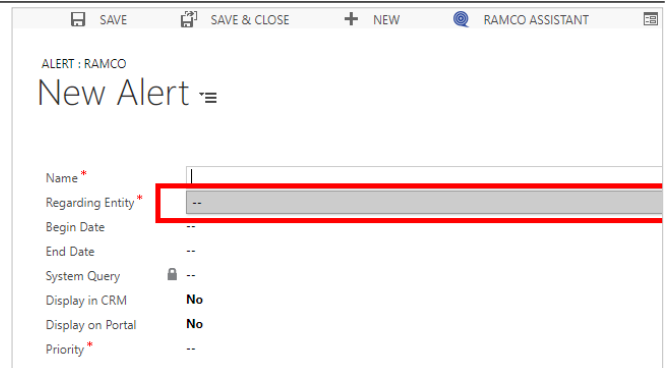
Give your Alert a name.



Click on the Regarding Entity field to enter the Entity this ALERT appears on. For a contact record you may simply type the word "Contact".

Some other entities, their may be a prefix in front of the name like "ramco_" or "cobalt_".

If you are not sure what the entity name is, you can view it in the system customizations window under "Entities"







RAMCO Portal

Set a date for when this Alert begins displaying. This field is required, and can be a date in the past if you like.

You may also enter an End Date but that is not required.

ALERT TEXT

 Select to enter data



Toggle whether this Alert should display in CRM?

Name *	You have Unpaid Orders
Regarding Entity *	contact
Begin Date	3/1/2021
End Date	--
System Query	--
Display in CRM	No
Display on Portal	No
Priority *	--
Sort Order	--

Toggle whether this ALERT should display on the portal.

Name *	You have Unpaid Orders
Regarding Entity *	contact
Begin Date	3/1/2021
End Date	--
System Query	--
Display in CRM	Yes
Display on Portal	No
Priority *	--
Sort Order	--

DESCRIPTION

Choose a priority level. The higher the priority, the higher the ALERT will appear amongst other ALERTS

Regarding Entity *	contact
Begin Date	3/1/2021
End Date	--
System Query	--
Display in CRM	Yes
Display on Portal	Yes
Priority *	--
Sort Order	--

DESCRIPTION



RAMCO Portal

Click on the command button **Save**

RAMCO Settings Alerts

SAVE SAVE & CLOSE + NEW FORM EDIT

ALERT : RAM

New Alert

Name * **You have Unpaid Orders**

Regarding Entity * **contact**

Begin Date **3/1/2021**

Click on the command button **MORE COMMANDS**

ATES RUN REPORT

Created By: Lopez, Reggie Created On: 3/29/2021 11:45 AM Status Reason: Active

You must not set a Query for which records the ALERT will appear for.

To do this, click on View Query to open an Advanced Find window.

ATES RUN REPORT

View Query Form Editor

Created By: Lopez, Reggie Created On: 3/29/2021 11:45 AM Status Reason: Active

Make sure Details is enabled so that you can make changes to the Advanced Find

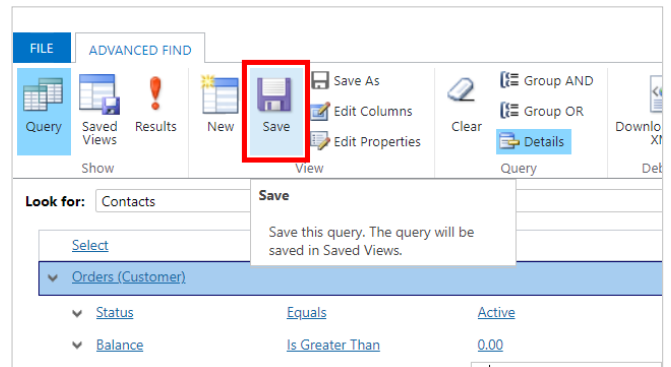
Details

Hide the query lines from view.



RAMCO Portal

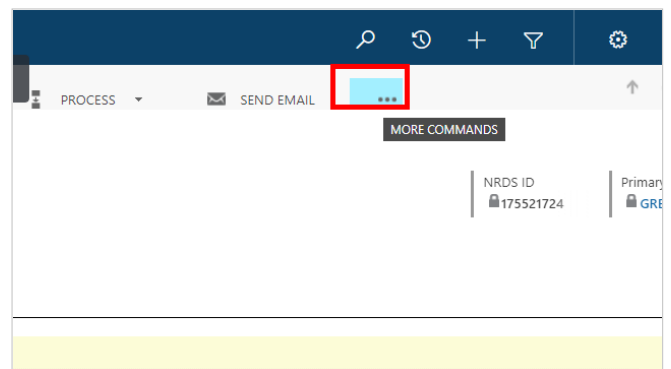
Once you have added all of your filter criteria, you may click the save button, then close the Advanced Find window.



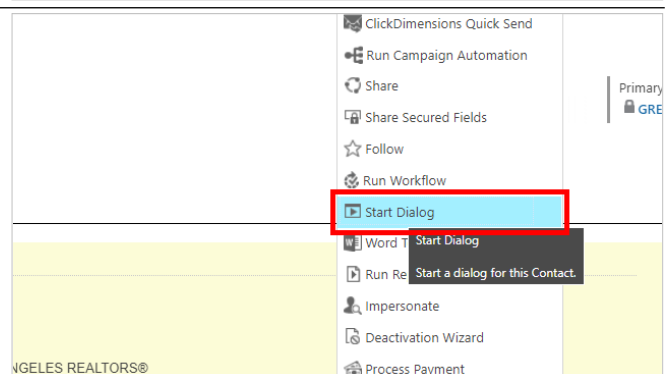
1.5.2. Run a Dialog

From any record in RAMCO, choose "Start Dialog" from the command bar.

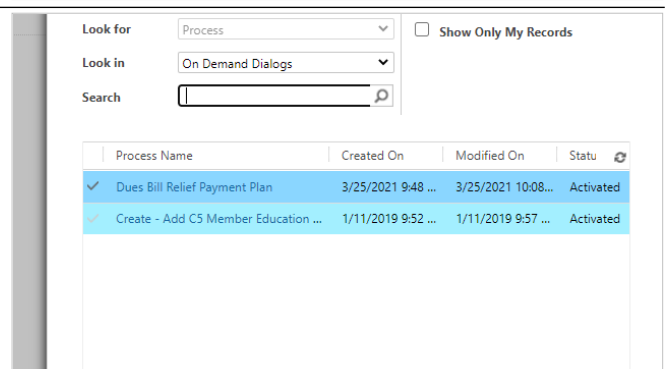
If you do not see that option, click the three dots to see more of the menu.



Click on the command button **Start Dialog**



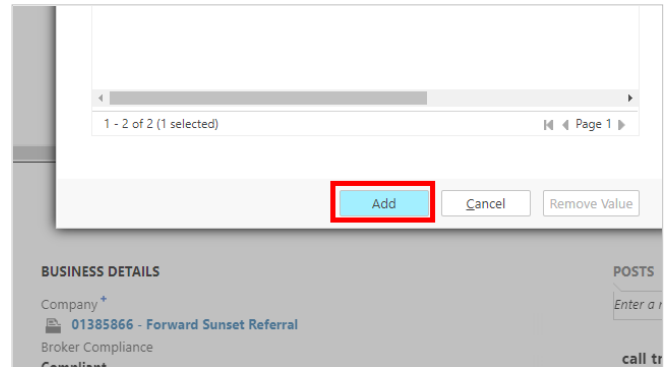
Choose a dialog from the list.





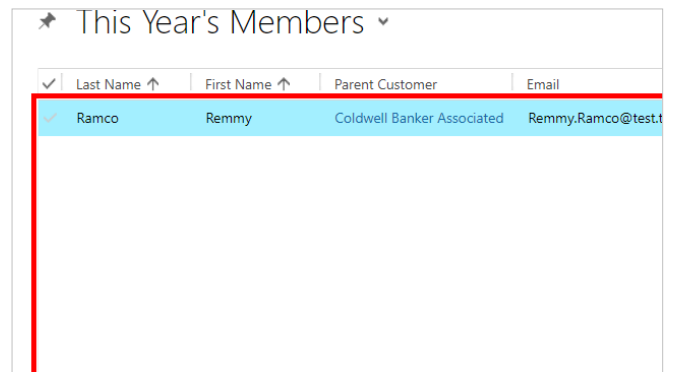
RAMCO Portal

Click on the "Add" button to start the dialog, then follow the prompts of the dialog.

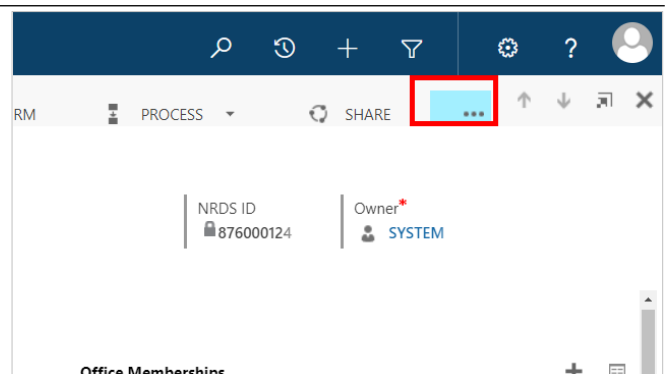


1.5.3. Run a Workflow

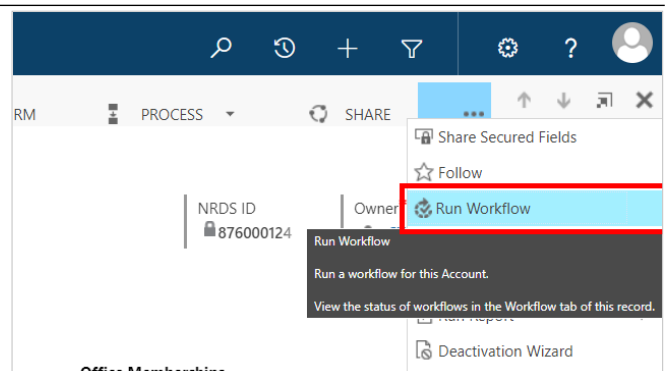
Open the Record you wish to run a workflow on



Click on the command button **MORE COMMANDS**



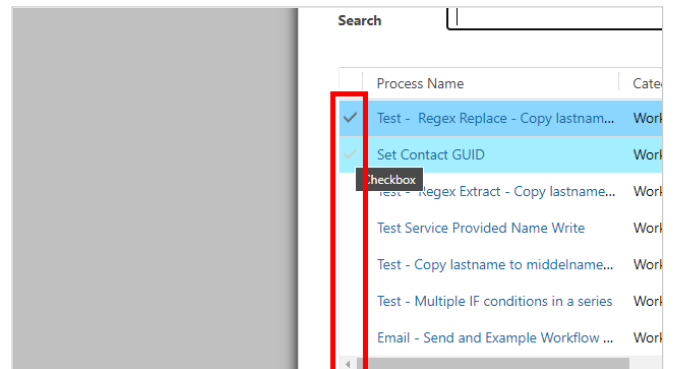
Click on the command button **Run Workflow**



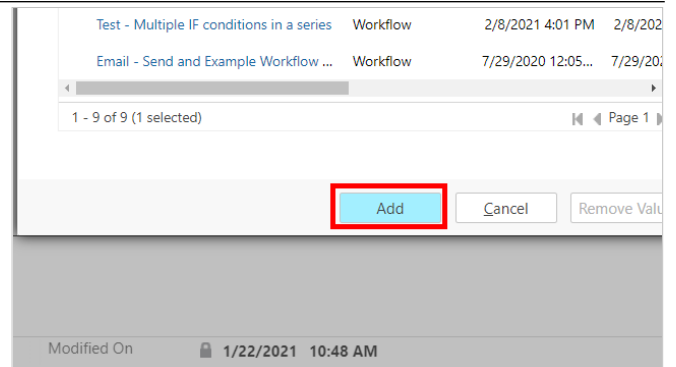


RAMCO Portal

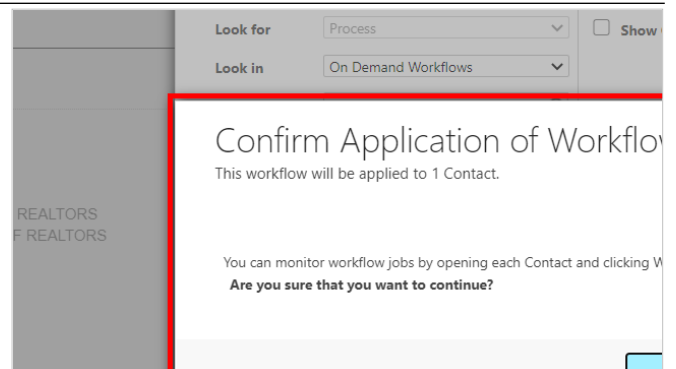
Make sure you check the workflow you wish to run.



Click on the button **Add**

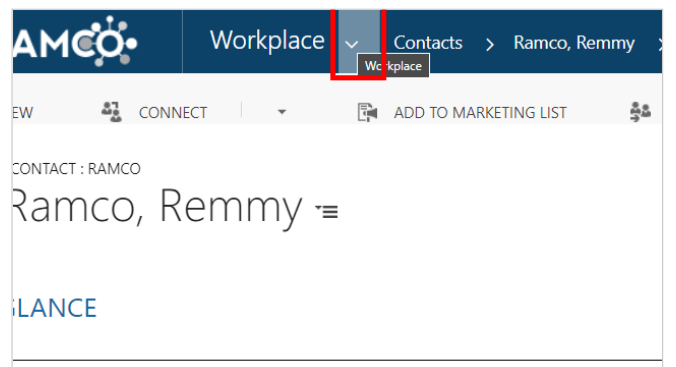


Then click OK to exit.



1.5.4. Set up a process

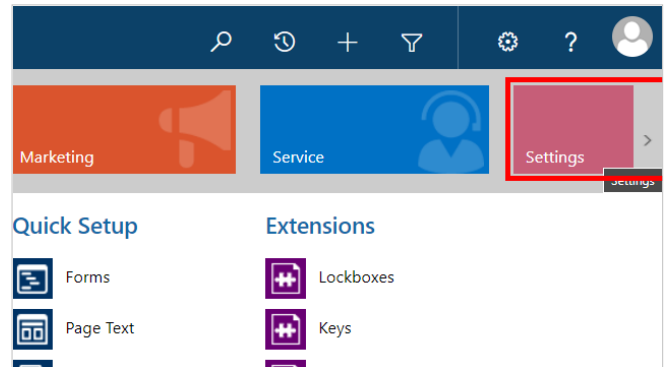
Open the Navigation Areas



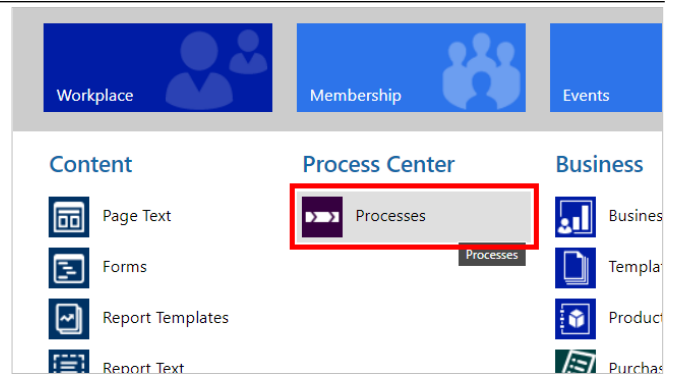


RAMCO Portal

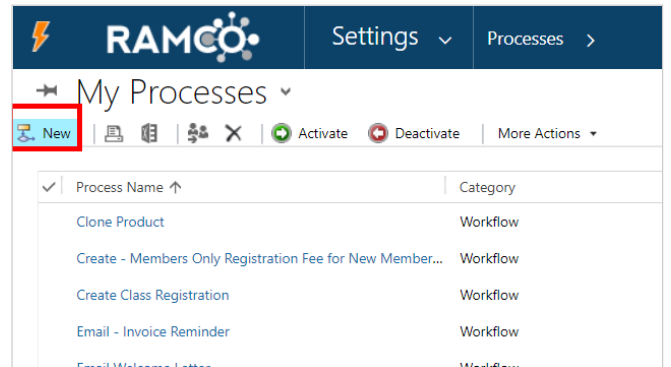
Choose the Settings Area



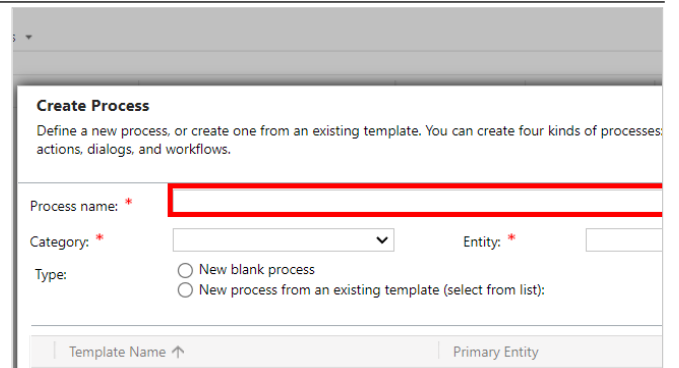
Choose the "Processes" entity



Click on the link **New**



Give the Process a name





RAMCO Portal

On the Category Menu

The screenshot shows the 'Create Process' form in the RAMCO Portal. The left sidebar has a 'Category' menu item highlighted. The main form area has a 'Category' dropdown menu, which is highlighted with a red box. The dropdown menu is currently closed, showing a downward arrow. Below the dropdown, there are radio buttons for 'New blank process' and 'New process from an existing template (select from list)'. The 'Process name' field is labeled 'Name'.

Choose Workflow from the list.

The screenshot shows the 'Create Process' form. The 'Category' dropdown menu is open, and the 'Workflow' option is selected, highlighted with a blue background and a red box. The other options in the dropdown are 'Action', 'Business Process Flow', and 'Dialog'. The 'Process name' field is labeled 'Name'.

Open the Entity menu

The screenshot shows the 'Create Process' form. The 'Entity' dropdown menu is highlighted with a red box. The dropdown menu is currently closed, showing a downward arrow. Below the dropdown, there are radio buttons for 'New blank process' and 'New process from an existing template (select from list)'. The 'Process name' field is labeled 'Name'.

Choose the entity for the process. Once chosen, the entity cannot be changed, and the process will only work for that entity

The screenshot shows the 'Create Process' form. The 'Entity' dropdown menu is open, and the 'Account' option is selected, highlighted with a blue background and a red box. The other options in the dropdown include 'Accounting', 'Accounting Export File Transformation', 'Address', 'Alert', 'Announcement', 'Answer', 'Appointment', 'Article', 'Article Comment', 'Article Template', 'Association', and 'Auto Number Definition'. The 'Process name' field is labeled 'Name'.



RAMCO Portal

Click on the button **OK**

A dialog box with a title bar and a close button. The main area is empty. At the bottom right, there are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangle.

Open the Scope menu

A dialog box titled "Options for Automatic Processes". It has fields for "Entity" (Account) and "Category" (Workflow). Below these is a "Scope" dropdown menu which is open, showing "User" as the selected option. To the right of the "Scope" dropdown are four checkboxes: "Record is created" (checked), "Record status changes", "Record is assigned", and "Record fields change". There is also a "Record is deleted" checkbox. A "Select" button is next to the "Record fields change" checkbox. The "Record is created" checkbox is highlighted with a red rectangle.

Select a scope for this process.

The scope determines who is allowed to use this process.

A dialog box titled "Options for Automatic Processes". It has fields for "Entity" (Account) and "Category" (Workflow). Below these is a "Scope" dropdown menu which is open, showing "User", "Business Unit", "Parent: Child Business Units", and "Organization" as options. "Organization" is highlighted with a blue background. To the right of the "Scope" dropdown are four checkboxes: "Record is created" (checked), "Record status changes", "Record is assigned", and "Record fields change". There is also a "Record is deleted" checkbox. A "Select" button is next to the "Record fields change" checkbox. The "Record is created" checkbox is highlighted with a red rectangle.

Uncheck the "Record is Created" start condition.

This means this workflow will run anytime a record of this entity is created.

Be mindful when choosing start conditions and make sure you know exactly when you want this workflow to operate.

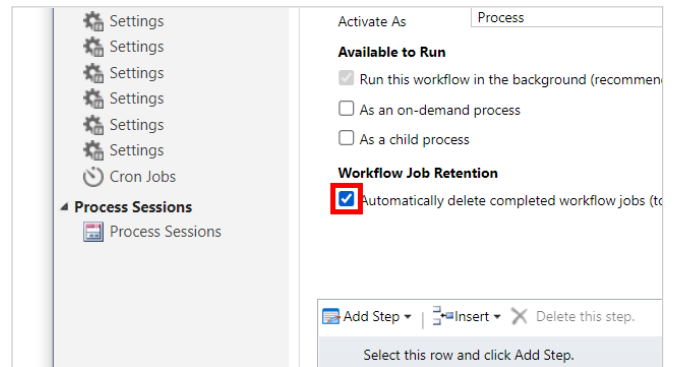
A dialog box titled "Options for Automatic Processes". It has fields for "Entity" (Account) and "Category" (Workflow). Below these is a "Scope" dropdown menu which is open, showing "Organization" as the selected option. To the right of the "Scope" dropdown are four checkboxes: "Record is created" (checked), "Record status changes", "Record is assigned", and "Record fields change". There is also a "Record is deleted" checkbox. A "Select" button is next to the "Record fields change" checkbox. The "Record is created" checkbox is highlighted with a red rectangle.



RAMCO Portal

Uncheck the box labeled: "Automatically delete completed workflow jobs (to save disk space)"

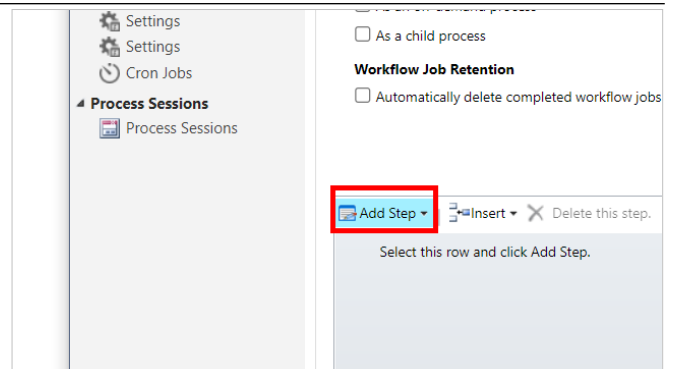
This will keep a record of when a process runs, so we do not want to delete those.



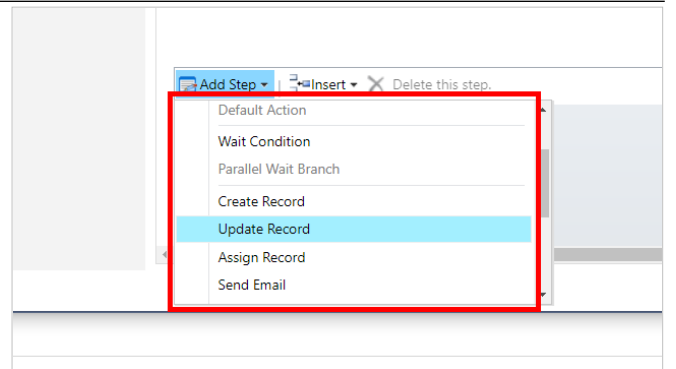
Now that the process settings are configured, you must now use Add Step to add the instructions.

Creating workflows well means being able to put together a series of steps to achieve the desired outcome.

It takes practice to get good at.



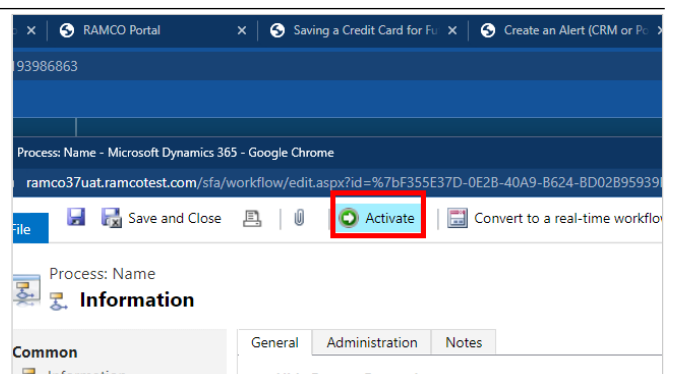
Get familiar with all the steps and how they operate.



Once all of your steps are completed, click save

Once saved, the workflow is in draft mode until it is activated.

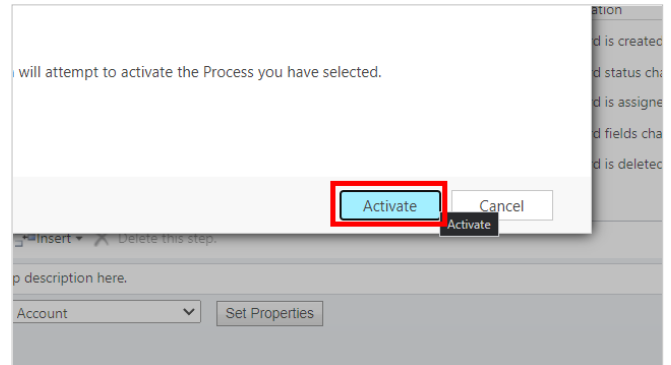
Workflows only work when they are activated.





RAMCO Portal

Click activate again to confirm activation.



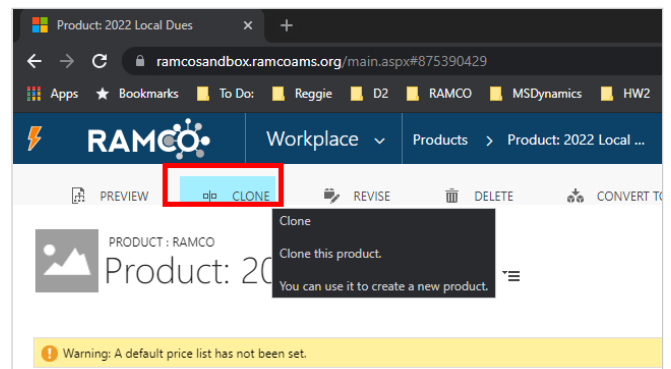
2. Accounting

2.1. Accounting (Basics)

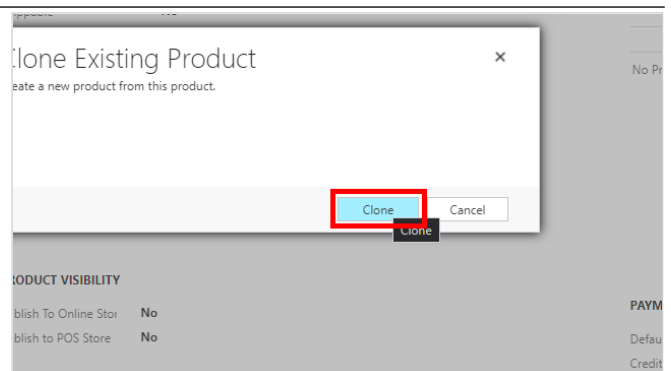
2.1.1. Clone a Product

Cloning allows you to create a product from an existing product. Similar to a "Save as..." feature.

To start this process click "Clone" from the product you want to make a clone of.



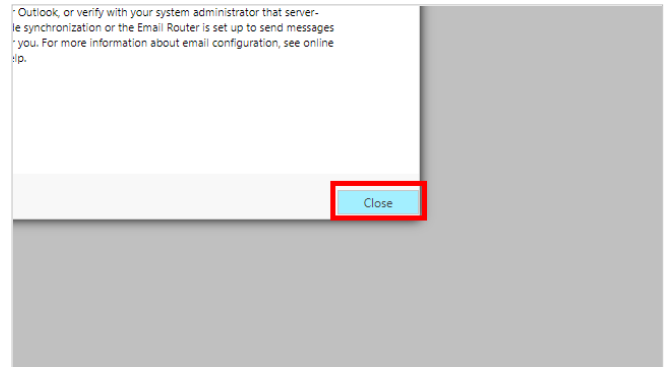
Click on the button **Clone**



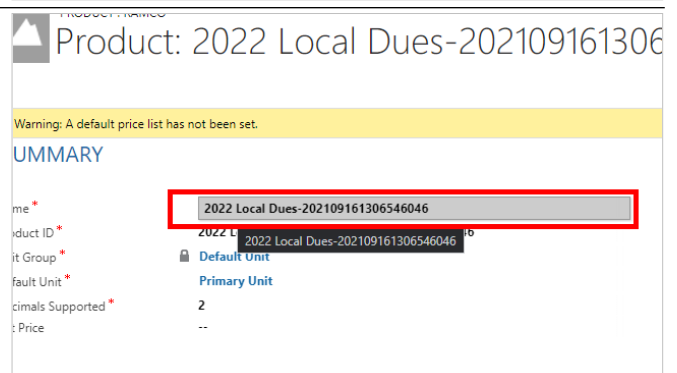


RAMCO Portal

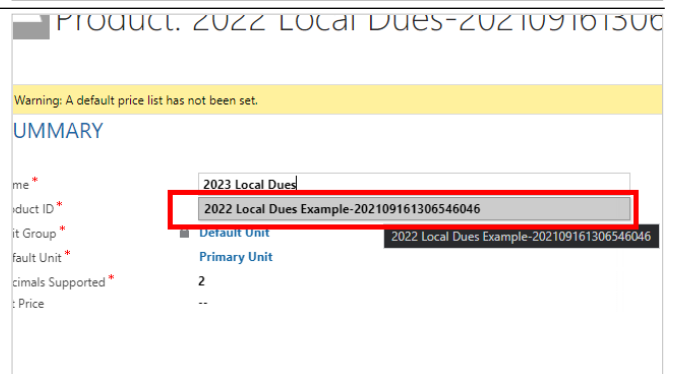
Click on the button **Close**



RAMCO will add a timestamp to the name, you simply need to update the name, then the product ID.



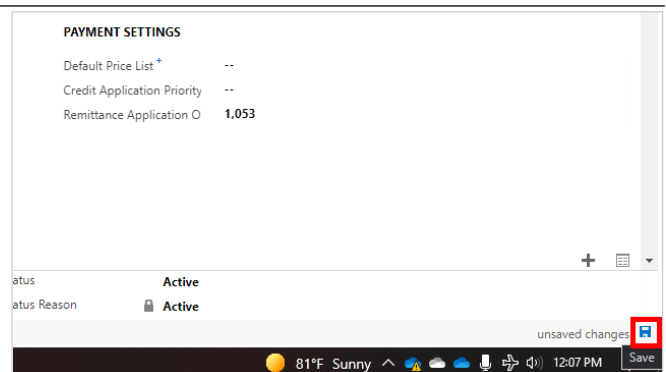
Click on the Product ID field to update it as well.



Click on the save icon to update the product.

Please note, cloning a product does not clone the price list items or the product gl accounts. Those still need to be created.

The next steps will go through that process.





RAMCO Portal

Price list items determine the price a contact pays, based on the list that person is on. So, we must set a price for each list.

Click on the plus symbol to add a new price list item.

percentage | +

PRODUCT GL ACCOUNT (REQUIRED)

Product ↑

No Product GL Account records found.

Click on the field "Price List" to choose a list.

Most boards have a "Member" list and a "Non-member" list. If you have different lists, you will need to create a price list item for each one.

SAVE SAVE & CLOSE + NEW FORM EDITOR

PRICE LIST ITEM : PRODUCT PRICE LIST

2022 Local Du...

General

Price List * --

Product * 2022 Local Dues

Unit * Primary Unit

Currency Discount List Quantity Selling

Pricing

Pricing Method * Currency Amount

Click on the lookup item **Member**

PRICE LIST ITEM : PRODUCT PRICE LIST

2022 Local Du...

General

Price List * Member

Product * 2022 Local Dues

Unit * Primary Unit

Currency Discount List Quantity Selling

Pricing

Pricing Method * Currency Amount

Amount * --

Click on the field "Amount" to set a price people on this list would pay.

Price List * Member

Product * 2022 Local Dues

Unit * Primary Unit

Currency Discount List Quantity Selling

Pricing

Pricing Method * Currency Amount

Amount * --

Percentage --

Rounding



RAMCO Portal

Click "Save & Close" to complete this price list item.

RAMCO may take a moment to complete this, so be patient.

This screenshot shows the top of the RAMCO Portal interface. The browser address bar indicates the URL is ramcosandbox.ramcoams.org. The page title is '2022 Local Dues'. The 'SAVE & CLOSE' button is highlighted with a red rectangle. Other buttons visible include 'REVISE', 'DELETE', 'CONVERT TO KIT', 'PROCESS', 'NEW', and 'FORM EDITOR'.

To add another price list item, click on the plus symbol again.

This screenshot shows the 'PRODUCT GL ACCOUNT (REQUIRED)' section of the form. A red box highlights a plus sign button. Below it, there is a 'Product' dropdown menu and a message that says 'No Product GL Account records found.'

Click on "Price List" to choose the next one list.

This screenshot shows the 'General' section of the form. The 'Price List' dropdown menu is highlighted with a red box. Other fields visible include 'Product' (set to '2022 Local Dues'), 'Unit' (set to 'Primary Unit'), 'Currency', 'Discount List', and 'Quantity Selling'.

Click on the lookup item **Non-Member**

This screenshot shows the 'General' section of the form. The 'Price List' dropdown menu is highlighted with a red box. Other fields visible include 'Product' (set to '2022 Local Dues'), 'Unit' (set to 'Primary Unit'), 'Currency', 'Discount List', and 'Quantity Selling'.



RAMCO Portal

Click on Amount to set the price for this list.

Price List: Non-Member
Product: 2022 Local Dues
Unit: Primary Unit
Currency: Currency
Discount List: Discount List
Quantity Selling: Quantity Selling

Pricing

Pricing Method: --
Amount: --
Percentage: --

Currency Amount

--

Select to enter data

Rounding

Click "Save & Close" to complete this price list item.

RAMCO may take a moment to complete this, so be patient.

REVISION: 2
DELETED: 0
CONVERT TO KIT: 0
PROCESS: 0
EIV: 0

Price List Item: 2022 Local Dues - Microsoft Dynamics 365 - Google Chrome
ramcosandbox.ramcoams.org/main.aspx?etc=1026&extraqs=%3f_C

RAMCO 2022 Local Dues

SAVE SAVE & CLOSE + NEW

PRICE LIST ITEM : PRODUCT PRICE
2022 Local Dues...

General

For bookkeeping purposes, RAMCO needs to know where to report revenue when a product is sold.

To do this you must add a "product gl account".

Click on the plus symbol to add one.

Credit Application Priority: --
Remittance Application O: 1,053

+ Add Product GL Account record.

General Ledger Account... Type

Click on the search button of field **GL Account**

RAMCO

Product GL Acc...

2022 Local Dues

--

--



RAMCO Portal

Choose the correct GL account for this product from the list.

If you are not sure which to choose, please confer with your bookkeeper.

GL Account	Category
AR - Assoc	Receivables
AR - MLS	Receivables
Assoc Dues	Revenue
Bakery Cash 01000	Cash
Bakery Receivables 02000	Receivables
Birthday Ticket Sales	Revenue
Cake Revenue 10000	Revenue

Click on the command button **Save & Close**

Product GL Account: RAMCO

2022 Local Dues

Assoc Dues

Please close this assist, then restart it when you have opened a product record.

2.1.2. Create a Product (For Class or Meetings)

Click in the Name field to give the product a name.

Since this product will be used for class or meeting registrations, it is a good idea put the prices in the beginning of the name.

For example, a product that was \$10 for members and \$30 for nonmembers, a good name for that product would be: "10/30 class registration fee"

Product: For Sale Sign - Large

Warning: A default price list has not been set.

Summary

Product ID: For Sale Sign - Large

Product Group: Default Unit

Product Unit: Primary Unit

Items Supported: 2

Price: --

Click on the field Product ID. This field must be unique, if you try to put something already in use by another product you will receive an error message

Product: For Sale Sign - Large

Warning: A default price list has not been set.

Summary

Product ID: 10/30 Class Registration Fee

Product Group: Default Unit

Product Unit: Primary Unit

Items Supported: 2

Price: --



RAMCO Portal

Click on the picklist **Product Type**

Default Unit *	Primary Unit
Decimals Supported *	2
List Price	--

NRDS Payment Type	--
Product Type	Sales Inventory
Category	--

Choose Class Registration fee or Meeting Registration fee respectively.

Default Unit *	Primary Unit
Decimals Supported *	2
List Price	--

NRDS Payment Type	--
Product Type	Meeting Registration Fee
Category	Meeting Activity Fee Class Registration Fee Refund / Failed Transaction Fee Contribution Other

Price list items determine the price a contact pays, based on the list that person is on. So, we must set a price for each list.

Click on the plus symbol to add a new price list item.

percentage	+	PRODUCT GL ACCOUNT (REQUIRED)
		Product ↑
		No Product GL Account records found.

Click on the field **Price List**

SAVE		SAVE & CLOSE	NEW	FORM EDITOR
PRICE LIST ITEM : PRODUCT PRICE LIST				
10/30 Class Re...				
General				
Price List *				Currency
Product *	10/30 Class Registration Fee			Discount List
Unit *	Primary Unit			Quantity Selling
Pricing				
Pricing Method *	Currency Amount			



RAMCO Portal

Then choose the Member list since this will determine the price a member pays.

PRICE LIST ITEM : PRODUCT PRICE LIST

10/30 Class Re...

General

Price List *

Product *

Unit *

Member
US Dollar

Non-Member
US Dollar

[Look Up More Records](#)

2 results


Currency Amount

Pricing Method *

Amount *

Pricing Method...

Click on the field amount, then set the price a member would pay.

Price List 	Member	Currency
Product *	10/30 Class Registration Fee	Discount List
Unit *	Primary Unit	Quantity Selling

Pricing

Pricing Method *	Currency Amount
Amount *	<div style="border: 2px solid red; padding: 2px;">--</div>
Percentage	<input type="checkbox"/> --

Rounding

Click "Save & Close" to create the price list item.

This sets the price for members, now we must create another price list item with the price a nonmember would pay.

The screenshot shows the RAMCO application interface. At the top, there is a navigation bar with buttons: REVISE, DELETE, CONVERT TO KIT, PROCESS, and a dropdown menu. Below this, the main content area displays a 'Price List Item: 10/30 Class Registration Fee - Microsoft Dynamics 365 - Google C' and a URL: 'ramcosandbox.ramcoams.org/main.aspx?etc=1026&extraqs=%3f'. The RAMCO logo is prominently displayed. Below the logo, there is a row of buttons: SAVE, SAVE & CLOSE (highlighted with a red rectangle), and NEW. The bottom section of the interface shows the text 'PRICE LIST ITEM : PRODUCT PRICE LIST' and '10/30 Class Re...' followed by a menu icon. The 'General' tab is selected at the bottom.

Click on the link **Add Price List Item record.**

percentage

+

PRODUCT GL ACCOUNT (REQUIRED)

Product ↑

No Product GL Account records found.



RAMCO Portal

Click on the field **Price List**

Click on the lookup item **Non-Member**

Click in the Amount field, then set the nonmember price.

Click on the command button **Save & Close**



RAMCO Portal

For bookkeeping purposes, RAMCO needs to know where to report revenue when a product is sold.

To do this you must add a "product gl account".

Click on the plus symbol to add one.

This screenshot shows the top section of the RAMCO Portal. At the top, there are fields for 'Credit Application Priority' (set to '--') and 'Remittance Application O' (set to '1,053'). Below these is a table with columns 'General Ledger Account...' and 'Type'. To the right of the table is a button with a plus sign and a document icon, labeled 'Add Product GL Account record.'.

Click on the search button of field **GL Account**

This screenshot shows the 'Product GL Account' form. It has a header with 'SAVE & CLOSE', '+ NEW', and 'FORM EDITOR'. The main area has a label 'Product GL Account...' and a dropdown menu. Below the dropdown is a search button (magnifying glass icon) which is highlighted with a red box.

Choose the correct GL account for this product from the list.

If you are not sure which to choose, please confer with your bookkeeper.

This screenshot shows the dropdown menu for the 'GL Account' field. It lists several accounts with their types: 'AR - Assoc' (Receivables), 'AR - MLS' (Receivables), 'Assoc Dues' (Revenue), 'Bakery Cash 01000' (Cash), 'Bakery Receivables 02000' (Receivables), 'Birthday Ticket Sales' (Revenue), and 'Cake Revenue 10000' (Revenue). The 'Assoc Dues' account is highlighted with a red box.

Click on the command button **Save & Close**

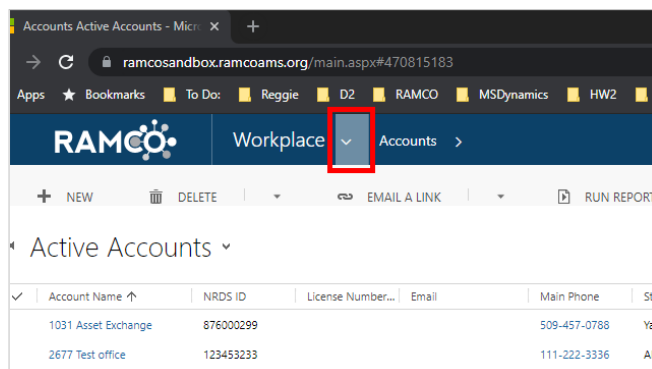
This screenshot shows the 'New Product GL Account' form. It has a header with 'SAVE', 'SAVE & CLOSE', '+ NEW', and 'FORM EDITOR'. The main area has a label 'New Product GL Account...' and a dropdown menu. Below the dropdown is a 'Save & Close' button which is highlighted with a red box.



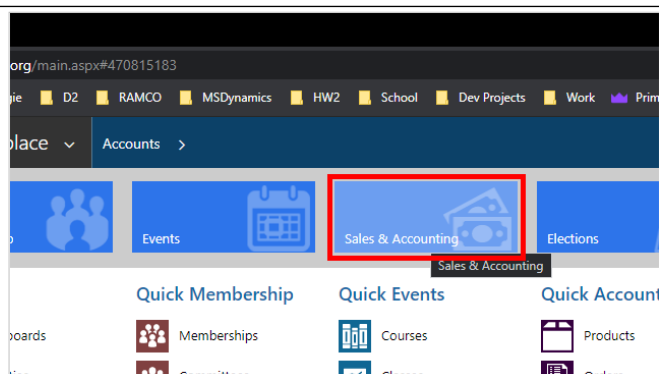
RAMCO Portal

2.1.3. Create a Product (For Dues)

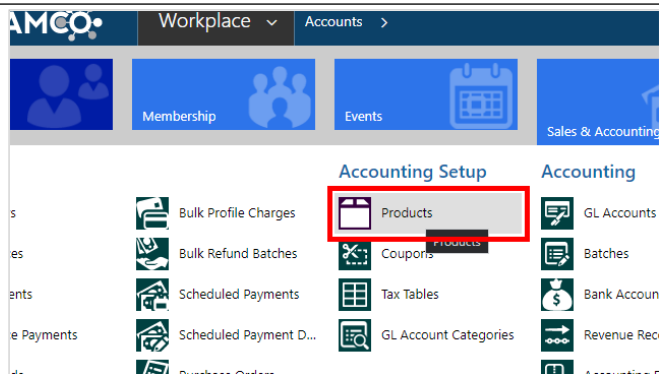
Open the Navigation Areas



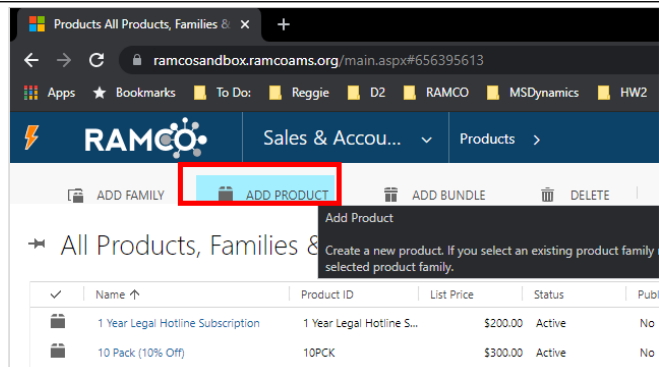
Choose the Sales & Accounting area



Choose the Products entity



Click on the command button **Add Product**





RAMCO Portal

Click on the Name field and give the product a name. For Dues products it is a good idea to put the year in front of the name.

For example, "2022 Local Dues".

This will make it easy to tell the difference when charging for the next year dues, which the member is paying.

PRODUCT: RAMCO

Product:

SUMMARY

Name *	
Product ID *	--
Unit Group *	--
Default Unit *	--
Decimals Supported *	--
Price	--

Click on the field Product ID. This field must be unique, if you try to put something already in use by another product you will receive an error message

PRODUCT: 2022 Local Dues

Warning: A default price list has not been set.

SUMMARY

Name *	2022 Local Dues
Product ID *	2022 Local Dues Example
Unit Group *	Default Unit
Default Unit *	Primary Unit
Decimals Supported *	2
Price	--

Click on the search button of field **Unit Group**

Product Name: 2022 Local Dues Example

Unit Group:

SALES TAX, SHIPPING & QUANTITY

Shippable	No
Taxable	No
Tax Table	--
Minimum Quantity	--
Quantity On Hand	--
Prevent Back Order	No
Current Cost	--
Average Cost	--

Click on the lookup item **Default Unit**

SUMMARY

2022 Local Dues

2022 Local Dues Example

Unit:

Default Unit

Look Up Default Unit

1 result

Payment Type: --



RAMCO Portal

Click on the search button of field **Default Unit**

SALES TAX, SHIPPING & QUANTITY

Shippable	No
Taxable	No
Tax Table	--
Minimum Quantity	--
Quantity On Hand	--
Prevent Back Order	No
Current Cost	--
Average Cost	--
Total Cost of Inventory	--

Click on the lookup item **Primary Unit**

Summary

2022 Local Dues

2022 Local Dues Example

Default Unit

Unit

Is Supported

Primary Unit

Look Up More Records

1 result

Payment Type

Type

Sales Inventory

Set the decimals supported to "2"

Summary

me *

Product ID *

Product Group *

Default Unit *

Items Supported *

Price

2022 Local Dues

2022 Local Dues Example

Default Unit

Primary Unit

--

Select to enter data

DS Payment Type

--

Product Type

Sales Inventory

Click on the picklist **Product Type**

Default Unit *	Primary Unit
Decimals Supported *	2
List Price	--
NRDS Payment Type	--
Product Type	Sales Inventory
Category	--



RAMCO Portal

Click on the picklist **Product Type** value **Dues**

Decimals Supported * 2
List Price --

NRDS Payment Type --

Product Type --

Category --

Membership Application

Dues

Meeting Registration Fee

Meeting Activity Fee

Click save to create the product.

Products in RAMCO do not work on their own, they require some additional records to determine price and revenue tracking.

We will create those next.

Product: New Product

ramcosandbox.ramcoams.org/main.aspx#875390429

Apps ★ Bookmarks To Do: Reggie D2 RAMCO MS Dynamics HW2

RAMCO Workplace Products > Product:

SAVE SAVE & CLOSE DEACTIVATION WIZARD FORM EDITOR

Save this Product.

Price list items determine the price a contact pays, based on the list that person is on. So, we must set a price for each list.

Click on the plus symbol to add a new price list item.

PRODUCT GL ACCOUNT (REQUIRED)

percentage

+

Product ↑

No Product GL Account records found.

Click on the field "Price List" to choose a list.

Most boards have a "Member" list and a "Non-member" list. If you have different lists, you will need to create a price list item for each one.

PRICE LIST ITEM : PRODUCT PRICE LIST

2022 Local Du...

General

Price List * **2022 Local Dues**

Product * **Primary Unit**

Unit * **Primary Unit**

Pricing

Pricing Method * **Currency Amount**

Currency Discount List Quantity Selling



RAMCO Portal

Click on the lookup item **Member**

PRICE LIST ITEM : PRODUCT PRICE LIST
2022 Local Dues

General

Price List *
Product *
Unit *

Pricing

Pricing Method *
Amount *

Member
2022 Local Dues
Primary Unit

Currency
Discount List
Quantity Selling

Pricing

Pricing Method *
Amount *
Percentage

Rounding

Click on the field "Amount" to set a price people on this list would pay.

Price List *
Product *
Unit *

Pricing

Pricing Method *
Amount *
Percentage

Rounding

Click "Save & Close" to complete this price list item.

RAMCO may take a moment to complete this, so be patient.

REVISE DELETE CONVERT TO KIT PROCESS

Price List Item: 2022 Local Dues - Microsoft Dynamics 365 - Google Chrome
ramcosandbox.ramcoams.org/main.aspx?etc=1026&extraqs=%3f_C

RAMCO 2022 Local Dues

SAVE SAVE & CLOSE NEW

PRICE LIST ITEM : PRODUCT PRICE LIST
2022 Local Dues

General

To add another price list item, click on the plus symbol again.

percentage

PRODUCT GL ACCOUNT (REQUIRED)

Product ↑
No Product GL Account records found.



RAMCO Portal

Click on "Price List" to choose the next one list.

Click on the lookup item **Non-Member**

Click on Amount to set the price for this list.

Click "Save & Close" to complete this price list item.

RAMCO may take a moment to complete this, so be patient.



RAMCO Portal

For bookkeeping purposes, RAMCO needs to know where to report revenue when a product is sold.

To do this you must add a "product gl account".

Click on the plus symbol to add one.

This screenshot shows the top section of the RAMCO Portal. At the top, there are fields for 'Credit Application Priority' (set to '--') and 'Remittance Application O' (set to '1,053'). Below these is a table with columns 'General Ledger Account...' and 'Type'. To the right of the table is a button with a plus sign and a document icon, labeled 'Add Product GL Account record.'.

Click on the search button of field **GL Account**

This screenshot shows the 'Product GL Account' form. The 'GL Account' field is highlighted with a red box, and a magnifying glass icon (search button) is also highlighted with a red box.

Choose the correct GL account for this product from the list.

If you are not sure which to choose, please confer with your bookkeeper.

This screenshot shows the 'Product GL Account' form with a dropdown menu open for the 'GL Account' field. The dropdown list contains several options, including 'AR - Assoc', 'AR - MLS', 'Assoc Dues', 'Bakery Cash 01000', 'Bakery Receivables 02000', 'Birthday Ticket Sales', and 'Cake Revenue 10000'. The 'Assoc Dues' option is highlighted with a red box.

Click on the command button **Save & Close**

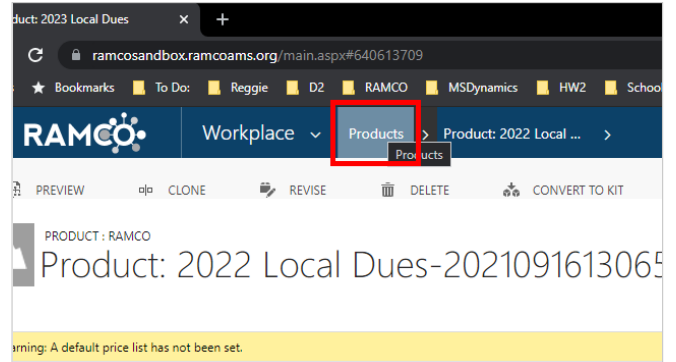
This screenshot shows the 'Product GL Account' form with the 'Save & Close' button highlighted with a red box. The button is located at the top of the form, next to the 'SAVE' and 'NEW' buttons.



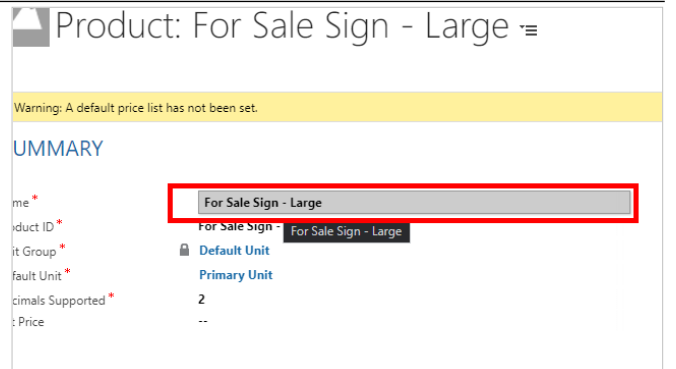
RAMCO Portal

2.1.4. Create a Product (To Sell from your Store)

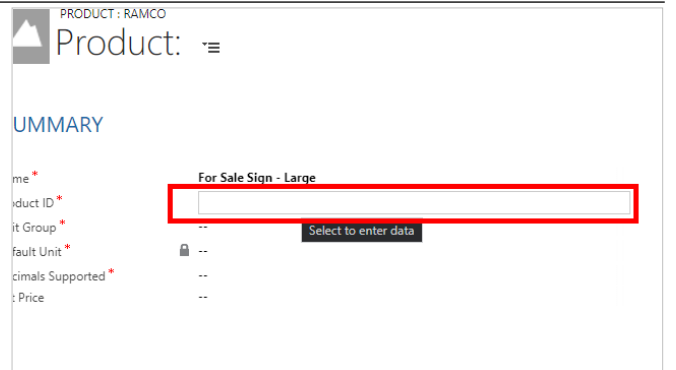
Click on the navigation button **Products**



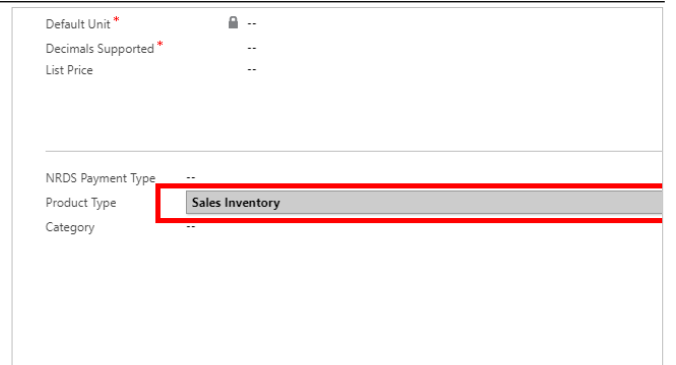
Click on the field "Name" and give the product a name.



Click on the field Product ID. This field must be unique, if you try to put something already in use by another product you will receive an error message



Click on the picklist **Product Type**





RAMCO Portal

Choose the product type "Sales Inventory"

Warning: Do not use "Sales Inventory" for anything other than store items. If you use it for other kinds of sales like sponsorships or dues, RAMCO may stop you from being able to process payments for this product.

List Price --

NRDS Payment Type --

Product Type --

Category --

Membership Application

Sales Inventory

Meeting Registration Fee

Meeting Activity Fee

If you want to allow people to purchase store items from your Portal, then come by the office to pick them up later, you must set "Shippable" to "Yes".

RAMCO does not calculate shipping costs, the reason this needs to be turned on, is so the member can choose whether which office they want to pick up their purchase. If you only have one office location, then this does not matter.

SALES TAX, SHIPPING & QUANTITY

Shippable No

Taxable No No

Tax Table --

Minimum Quantity --

Quantity On Hand --

Prevent Back Order No

Current Cost --

Average Cost --

Total Cost of Inventory --

In order for RAMCO to charge tax on a store sales, this must be set to yes.

SALES TAX, SHIPPING & QUANTITY

Shippable Yes

Taxable No

Tax Table --

Minimum Quantity --

Quantity On Hand --

Prevent Back Order No

Current Cost --

Average Cost --

Total Cost of Inventory --

If this item is taxable, you must select a tax table.

Tax tables contain the zip code for your office and the tax rate. If you have more than one office, the tax table should have the zip codes for each location.

PRODUCT LOCATIONS

Name ↑

To enable this content, create the record.



RAMCO Portal

Choose a tax table.

Shippable	Yes
Taxable	Yes
Tax Table	
Minimum Quantity	27513 2/22/2019 2:41 PM
Quantity On Hand	27513 2/22/2019 2:40 PM
Prevent Back Order	MikeC - Tax Ta 4/21/2020 3:23 PM
Current Cost	Reggie's Tax Table 1/11/2021 3:46 PM
Average Cost	
Total Cost of Inventory	

PRODUCT VISIBILITY
4 results

Look Up More Records

PRODUCT VISIBILITY

Publish To Online Stor No

Publish to POS Store No

The "Online Store" allows members to purchase store items from the portal, without the help of a staff person.

Minimum Quantity	--
Quantity On Hand	--
Prevent Back Order	No
Current Cost	--
Average Cost	--
Total Cost of Inventory	--

PRODUCT VISIBILITY

Publish To Online Stor No

Publish to POS Store No

The "POS Store" allows staff to sell this store item from the member's contact record in RAMCO.

If you want only staff to be able to process store sales, set POS Store to Yes, then set Online Store to No.

Minimum Quantity	--
Quantity On Hand	--
Prevent Back Order	No
Current Cost	--
Average Cost	--
Total Cost of Inventory	--

PRODUCT VISIBILITY

Publish To Online Stor Yes

Publish to POS Store No

Click on the search button of field **Unit Group**

Unit Group	SALES TAX, SHIPPING & QUANTITY
Large	Shippable Yes
Large	Taxable Yes
	Tax Table 27513
	Minimum Quantity --
	Quantity On Hand --
	Prevent Back Order No
	Current Cost --
	Average Cost --



RAMCO Portal

Click on the lookup item **Default Unit**

Summary

For Sale Sign - Large
For Sale Sign - Large

Unit *

Default Unit

Look Up More Records

1 result

Payment Type --

Click on the search button of field **Default Unit**

Large

Large

SALES TAX, SHIPPING & QUANTITY

Shippable	Yes
Taxable	Yes
Tax Table	27513
Minimum Quantity	--
Quantity On Hand	--
Prevent Back Order	No
Current Cost	--
Average Cost	--
Total Cost of Inventory	--

Click on the lookup item **Primary Unit**

Summary

For Sale Sign - Large
For Sale Sign - Large

Default Unit

Primary Unit

Look Up More Records

1 result

Payment Type --

Type Sales Inventory

Set decimals supported to 2.

Summary

me *

Product ID *

Unit Group *

Default Unit *

Primary Unit

Decimals Supported *

You must provide a value for Decimals Supported.

DS Payment Type --

Product Type Sales Inventory



RAMCO Portal

Click Save to create product.

Side Note: creating a product as sales inventory will automatically create a "Product Store Location" for each one of your offices. The purpose of these records is to keep track of inventory at each location.

We will set the inventory for those locations next.

Product: New Product

ramcosandbox.ramcoams.org/main.aspx#962304041

Apps ★ Bookmarks To Do: Reggie D2 RAMCO MSDynamics HW2

RAMCO Workplace Products > Product:

SAVE SAVE & CLOSE DEACTIVATION WIZARD FORM EDITOR

PRODUCT: RAMCO

Product: ☰

← SUMMARY

Expand the associated view of product store locations.

PRODUCT LOCATIONS

+ Add New

Name ↑ Quantity on Hand

No Product Location records found.

Then choose a store location to update the inventory there.

Warning: A default price list has not been set.

Product Location Associated View ▾

+ ADD NEW PRODUCT LOC... BULK DELETE CHART PANE R

✓	Name ↑	Product	Quantity on H...
	Alternate Store Location - For Sale Sign - Large	For Sale Sign - Large	0
	Default Store Location - For Sale Sign - Large	For Sale Sign - Large	0

Set the inventory of this product for this location.

PRODUCT LOCATION : RAMCO

Default Store Location - For Sale Sign - Large

Product * For Sale Sign - Large

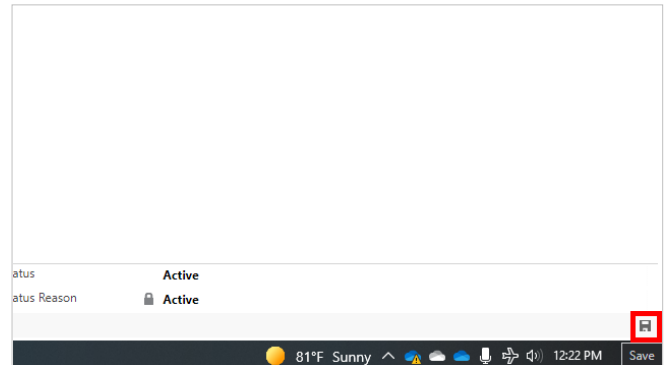
Quantity on Hand * 0

Store Location Default Store Location

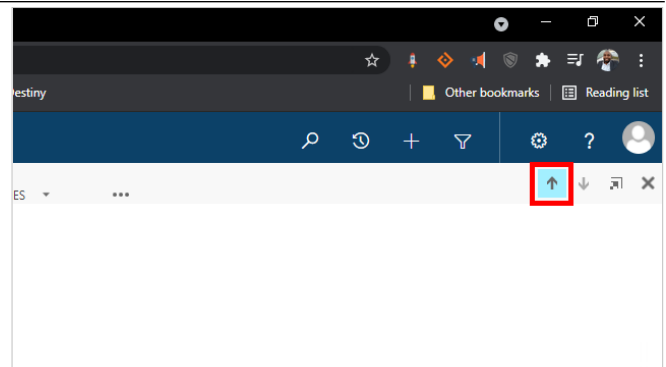


RAMCO Portal

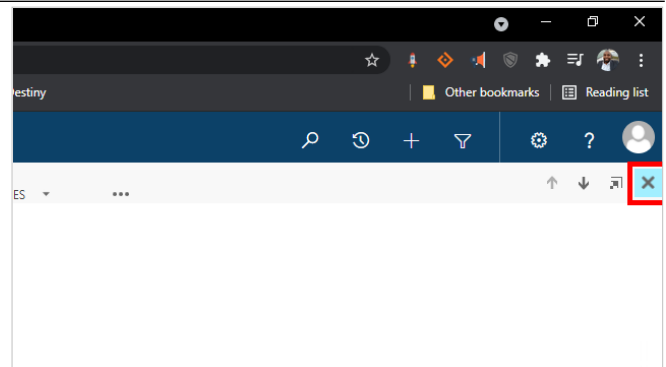
Click Save to update.



If you have more than one product store location, use the arrows to move up and down the list, then update the inventory for each location.

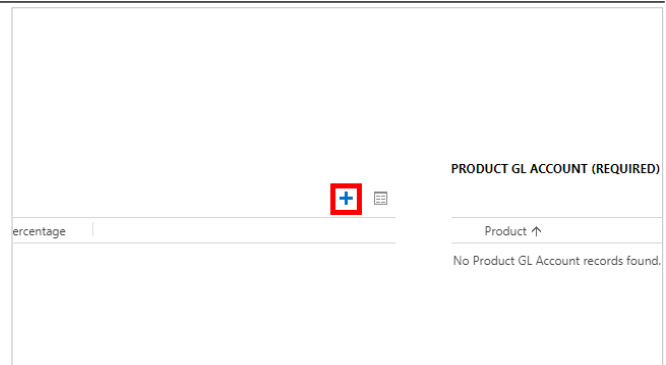


Once you have updated all store locations, click the X icon to return to the product. You may have to repeat this for each store location.



Price list items determine the price a contact pays, based on the list that person is on. So, we must set a price for each list.

Click on the plus symbol to add a new price list item.





RAMCO Portal

Click on the field "Price List" to choose a list.

Most boards have a "Member" list and a "Non-member" list. If you have different lists, you will need to create a price list item for each one.

PRICE LIST ITEM : PRODUCT PRICE LIST
2022 Local Du...
General
Price List *
Product *
Unit *
Pricing
Pricing Method *
Currency Amount

Click on the lookup item **Member**

PRICE LIST ITEM : PRODUCT PRICE LIST
2022 Local Du...
General
Price List *
Product *
Unit *
Pricing
Pricing Method *
Currency Amount

Click on the field "Amount" to set a price people on this list would pay.

Price List *
Product *
Unit *
Pricing
Pricing Method *
Amount *
Percentage
Rounding

Click "Save & Close" to complete this price list item.

RAMCO may take a moment to complete this, so be patient.

PRICE LIST ITEM : PRODUCT PRICE LIST
2022 Local Du...
General
Pricing
Pricing Method *
Amount *
Percentage
Rounding



RAMCO Portal

To add another price list item, click on the plus symbol again.

percentage | +

PRODUCT GL ACCOUNT (REQUIRED)

Product ↑

No Product GL Account records found.

Click on "Price List" to choose the next one list.

SAVE SAVE & CLOSE + NEW FORM EDITOR

PRICE LIST ITEM : PRODUCT PRICE LIST

2022 Local Du...

General

Price List * --

Product * 2022 Local Dues

Unit * Primary Unit

Pricing

Pricing Method * Currency Amount

Click on the lookup item **Non-Member**

2022 Local Du...

General

Price List * --

Product * 2022 Local Dues

Unit * Primary Unit

Pricing

Pricing Method * Currency Amount

Amount * --

Percentage --

Click on Amount to set the price for this list.

Price List * Non-Member

Product * 2022 Local Dues

Unit * Primary Unit

Pricing

Pricing Method * Currency Amount

Amount * --

Percentage -- Select to enter data

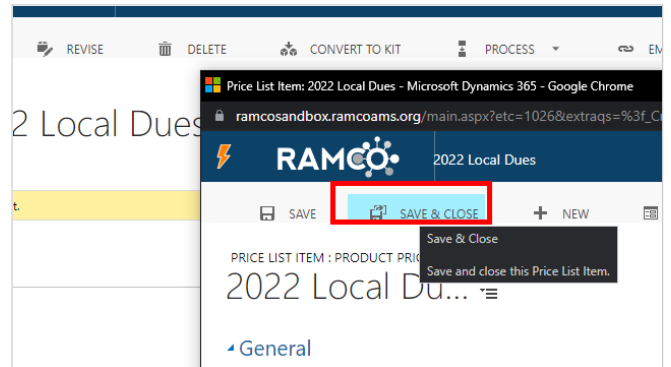
Rounding



RAMCO Portal

Click "Save & Close" to complete this price list item.

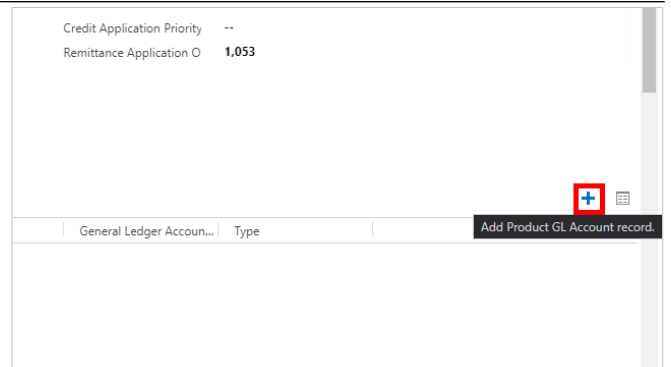
RAMCO may take a moment to complete this, so be patient.



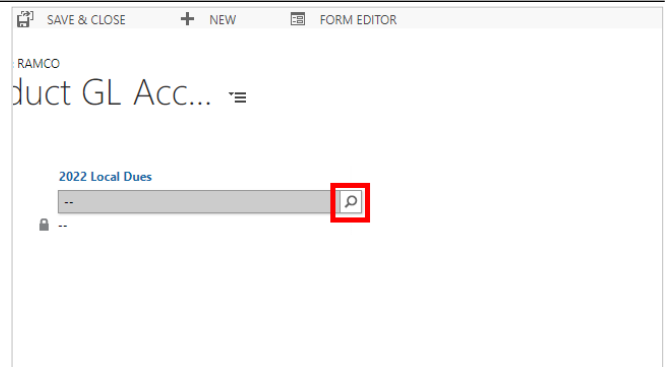
For bookkeeping purposes, RAMCO needs to know where to report revenue when a product is sold.

To do this you must add a "product gl account".

Click on the plus symbol to add one.

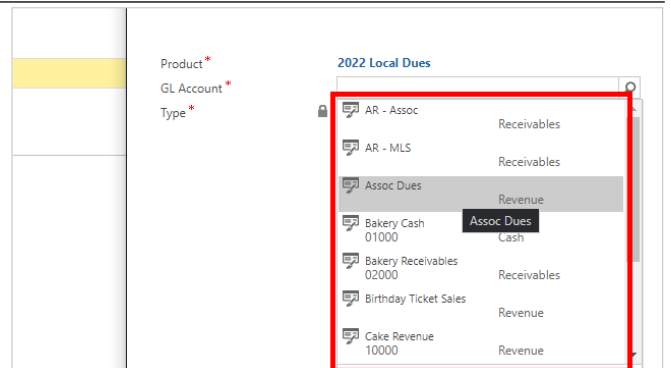


Click on the search button of field **GL Account**



Choose the correct GL account for this product from the list.

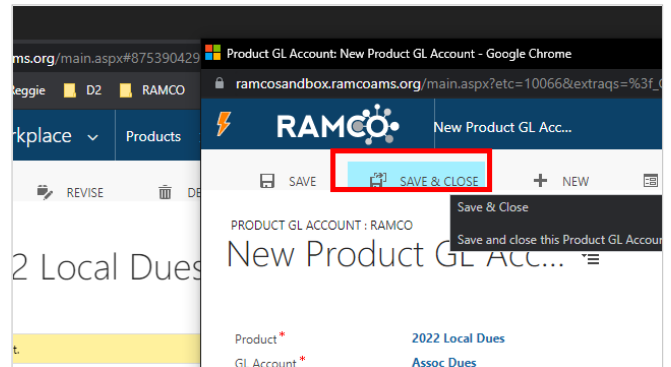
If you are not sure which to choose, please confer with your bookkeeper.





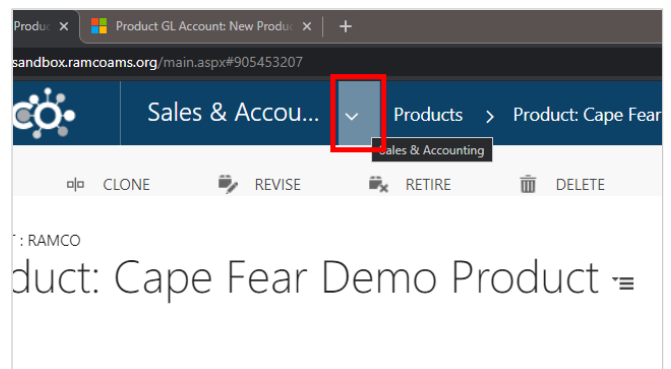
RAMCO Portal

Click on the command button **Save & Close**

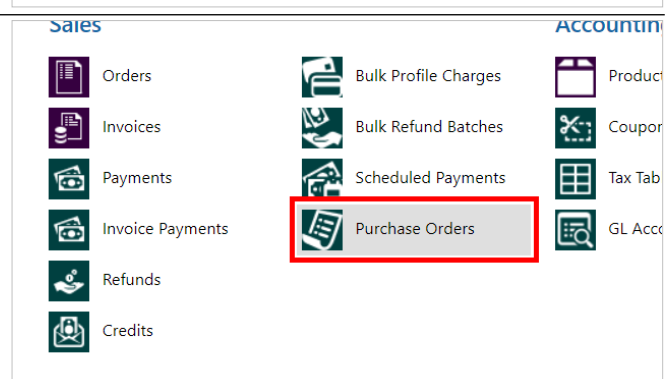


2.1.5. Create a Purchase Order

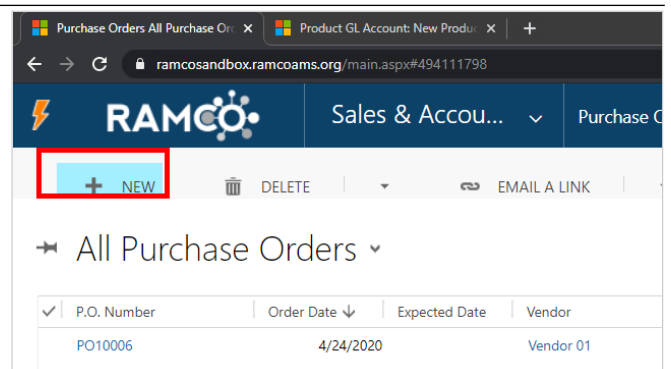
Open the Navigation Areas



Choose the Purchase Orders entity.



Click New to start a new record.





RAMCO Portal

Set the date the purchase order was made.

ew Purchase Order

All Purchase Order Items

Search for records

Name ↑

To enable this content, create

Click on the lookup **Vendor**

ew Purchase Order

General

Number --

er Date * 3/29/2021

dor * --

dor Invoice Date --

dor Invoice No. --

ected Date --

e Location * --

inating Purchase Order --

Choose a vendor

Invoice Date

Invoice No.

I Date

ocation *

ng Purchase Order

Aarrowhed Appraisal Service
876000264

Advance Realty
236500443

Advantage Real Estate Service
876001521

Affordable Rentals LLC
876000308

Agri-Access
345503696

Akheritage Test

Look Up More Records

Choose the corresponding store location for the inventory to be stocked.

ew Purchase Order

General

Number --

er Date * 3/29/2021

dor * Affordable Rentals LLC

dor Invoice Date --

dor Invoice No. --

ected Date --

e Location * --

inating Purchase Order --



RAMCO Portal

Click save to create the Purchase Order.

Now a Purchase Order Item must be created for each item in your order.

PURCHASE ORDER : RAMCO

New Purchase Order

General

To add a Purchase Order Item, click on the plus icon.

Order

Quantity Ordered	Quantity Expected...	Quantity Received	Sta
------------------	----------------------	-------------------	-----

Click on the lookup **Product**

New Purchase Order...

General

Purchase Order * PO10007

Product * ..

Quantity Ordered * ..

Quantity Received ..

Quantity Expected ..

Current Cost ..

All Purchase Ord

Search for records

Name ↑

To enable this cor

Choose a product to add.

New Purchase Order...

General

Purchase Order * PO10007

Product * ..

Quantity Ordered * ..

Quantity Received ..

Quantity Expected ..

Current Cost ..

All Purchase Order It

Search for records

10 Pack (10% Off) 10PCK \$300.00

2019 Local 10PCK

2019 Local Dues

2019 National Dues 2019 National D...

2019 National Image Campaign 2019 National I...



RAMCO Portal

Click on the field **Quantity Ordered**

Enter the qty ordered.

Click Save and Close to complete the process.

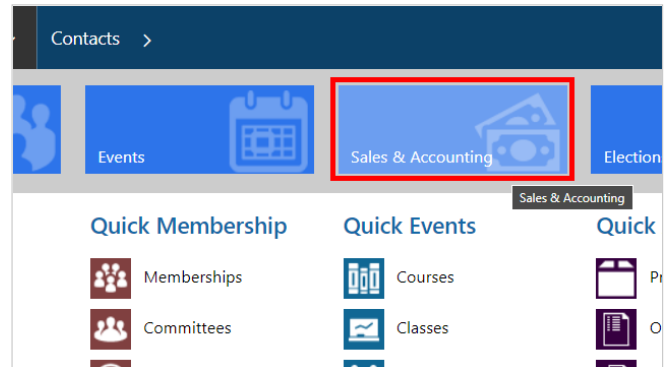
2.1.6. Create Coupon (Discounts a dollar amount)

Open the navigation areas

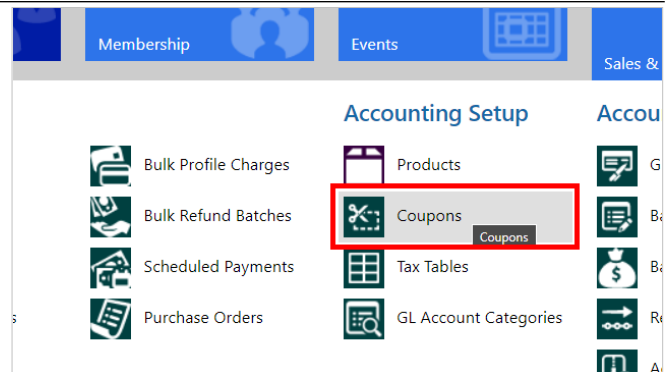


RAMCO Portal

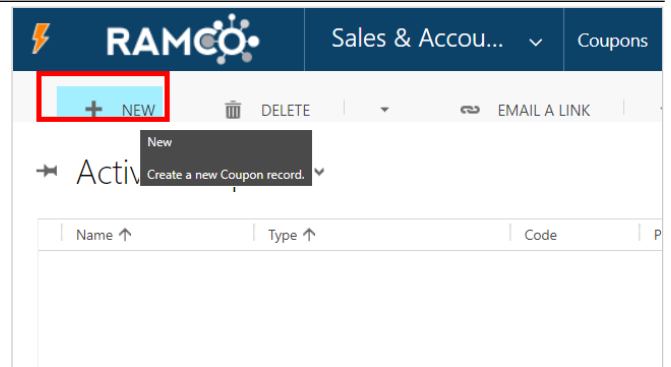
Choose the Sales and Accounting module



Choose the Coupons entity



Click on the command button **New**



A quick note about coupons. They can discount a specific dollar amount or a percentage. They can also be restricted to only discount a line item or the entire order. Lastly, you can set coupons for a certain number of uses, once it is all used up, it will no longer work, or they can be set to expire on a certain date. Coupons cannot be limited on a per person basis. Essentially if a coupon is limited to 10 uses, it can be used by the same person on 10 different orders.

Enter a name for the coupon





RAMCO Portal

Then enter a code. This is the code that staff or the member will use to apply the discount.

SAVE SAVE & CLOSE NEW FORM EDITOR

PON : RAMCO

New Coupon

ne *

pon Code *

pon Type *

New Member Coupon

N

--

ES

Click on the Coupon type field.

SAVE SAVE & CLOSE NEW FORM EDITOR

PON : RAMCO

New Coupon

ne *

pon Code *

pon Type *

New Member Coupon

NMCOU

--

Select to enter data

ES

ration Date --

binable No

Choose a product single or product all dollar amount

SAVE SAVE & CLOSE NEW FORM EDITOR

PON : RAMCO

New Coupon

ne *

pon Code *

pon Type *

New Member Coupon

NMCOU

Order - Percentage

Product (Single) - Dollar Amount

Product (Single) - Percentage

Product (All) - Dollar Amount

Product (All) - Percentage

ES

n Date --

binable No

For coupons linked to specific product, you must link that product

SAVE SAVE & CLOSE NEW FORM EDITOR

PON : RAMCO

New Coupon

ne *

pon Code *

pon Type *

New Member Coupon

NMCOU

Product (Single) - Dollar Amount

--

ES

duct *

ount *

ency *

US Dollar



RAMCO Portal

Choose product to link your coupon to.

New Member Coupon
NMCOU
Product (Single) - Dollar Amount

1 Year Legal Hotline Subscription	\$200.00
1 Year Legal Hotline S...	
10 Pack (10% Off)	\$300.00
10PCK	
2019 Local Dues	
2019 Local Dues	
2019 National Dues	
2019 National Dues	

Enter the dollar amount of the discount.

New Member Coupon
NMCOU
Product (Single) - Dollar Amount

1 Year Legal Hotline Subscription

--

US Dollar

ES

Expiration Date 4/9/2021

Coupon Code NMCOU

Coupon Type

Percentage

If applicable, set an expiration date for the coupon.

ES

Expiration Date --

Combinable No

Number of Uses --

Select to enter data

Combinable determines whether this coupon can be used with other coupons.

ES

Coupon Type

Percentage 10.00

Expiration Date 4/10/2021

Combinable No

Number of Uses --

No



RAMCO Portal

To limit how many times this coupon can be used, enter that number here.

Side Note: This is a total number of uses, not a limit per person. Currently, members can reuse a coupon until it runs out of uses.

Percentage: 10.00

ES

Expiration Date: 4/10/2021

Redeemable: Yes

Number of Uses: --

Select to enter data

Enter a description of what this coupon is for.

DESCRIPTION *

--

Select to enter data

Coupon Redemptions Sub-Grid

Search for records

Sales Order Customer (Sales Order)...

Click on the command button **Save**

RAMCO Sales & Account... Coupons

SAVE SAVE & CLOSE + NEW FORM EDIT

COUPON Save this Coupon.

New Coupon

Name * New Member Coupon

Coupon Code * NMCOU

Coupon Type * Order - Percentage

2.1.7. Create Coupon (Discounts a percentage)

Open the navigation areas

RAMCO Workplace Contacts

NEW DELETE EMAIL A LINK RUN

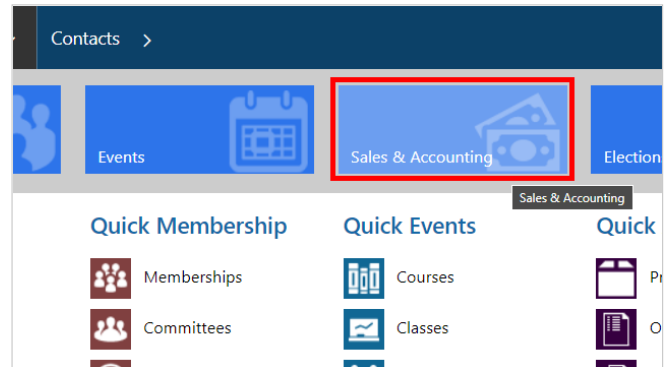
Year's Members

First Name	Parent Customer	Email	Mobile Phone
Remmy	Coldwell Banker Associated	Remmy.Ramco@test.test	

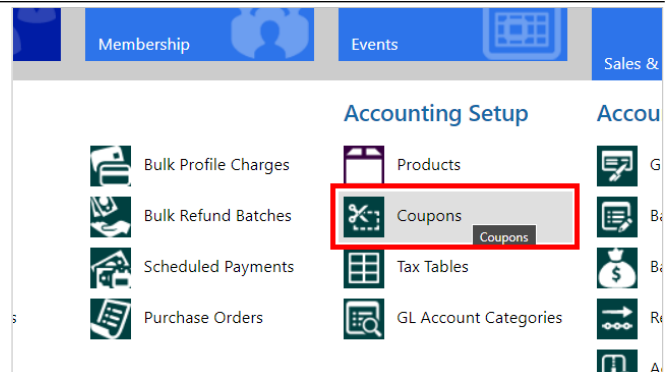


RAMCO Portal

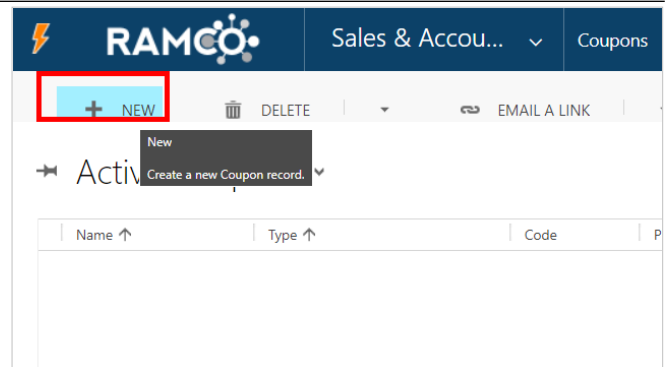
Choose the Sales and Accounting module



Choose the Coupons entity



Click on the command button **New**



A quick note about coupons. They can discount a specific dollar amount or a percentage. They can also be restricted to only discount a line item or the entire order. Lastly, you can set coupons for a certain number of uses, once it is all used up, it will no longer work, or they can be set to expire on a certain date. Coupons cannot be limited on a per person basis. Essentially if a coupon is limited to 10 uses, it can be used by the same person on 10 different orders.

Enter a name for the coupon





RAMCO Portal

Then enter a code. This is the code that staff or the member will use to apply the discount.

SAVE SAVE & CLOSE NEW FORM EDITOR

PON : RAMCO

New Coupon

ne *

pon Code *

pon Type *

New Member Coupon

N

--

ES

Click on the Coupon type field.

NEW Coupon

ne *

pon Code *

pon Type *

New Member Coupon

NMCOU

--

Select to enter data

ES

ration Date --

binable No

Choose Order or Product percentage

NEW Coupon

Code *

Type *

New Member Coupon

NMCOU

Order - Percentage

Product (Single) - Dollar Amount

Product (Single) - Percentage

Product (All) - Dollar Amount

Product (All) - Percentage

n Date --

binable No

For percentage coupons, you must enter discount percentage

NEW Coupon

ne *

pon Code *

pon Type *

centage *

New Member Coupon

NMCOU

Order - Percentage

--

Select to enter data

ES

ration Date --

binable No



RAMCO Portal

For coupons linked to specific product, you must link that product

New Member Coupon

NMCOU

Product (Single) - Dollar Amount

--

US Dollar

ES

Choose product to link your coupon to.

New Member Coupon

NMCOU

Product (Single) - Dollar Amount

1 Year Legal Hotline Subscription \$200.00

1 Year Legal Hotline S... \$200.00

10 Pack (10% Off) 10PCK \$300.00

2019 Local Dues

2019 Local Dues

2019 National Dues

2019 National Dues

ES

If applicable, set an expiration date for the coupon.

New Member Coupon

NMCOU

Order - Percentage

10

Expiration Date

--

Combinable

No

Number of Uses

--

ES

Combinable determines whether this coupon can be used with other coupons.

New Member Coupon

NMCOU

Order - Percentage

10.00

Expiration Date

4/10/2021

Combinable

No

Number of Uses

--

ES



RAMCO Portal

To limit how many times this coupon can be used, enter that number here.

Side Note: This is a total number of uses, not a limit per person. Currently, members can reuse a coupon until it runs out of uses.

Percentage 10.00

ES

Expiration Date 4/10/2021

Redeemable Yes

Number of Uses --

Select to enter data

Enter a description of what this coupon is for.

DESCRIPTION *

--

Select to enter data

Coupon Redemptions Sub-Grid

Search for records

Sales Order Customer (Sales Order)...

Click on the command button **Save**

RAMCO Sales & Accou... Coupons

SAVE SAVE & CLOSE + NEW FORM EDIT

COUPON Save this Coupon.

New Coupon

Name * New Member Coupon

Coupon Code * NMCOU

Coupon Type * Order - Percentage

2.1.8. Manually Update Price of Line Item on an Order

You must be in the Order record you wish to modify to use this Assist module. Orders may only be edited if they ARE NOT associated with renewal billing. If this Order is associated with a renewal billing, you must edit the dues item instead of the order.

The process is different for Renewal bills vs. Non-Renewal bills.



RAMCO Portal

You may click into the "Price Per Unit" to update the item's price.

Order Product Inline Edit View

Search for records

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended A
RPAC Cont		Primary Unit	\$50.00	1.00000	\$0.00	\$50.00
2021 Local		Primary Unit	\$90.00	1.00000	\$0.00	\$90.00
2021 Natli		Primary Unit	\$35.00	1.00000	\$0.00	\$35.00
2021 Natli		Primary Unit	\$90.00	1.00000	\$0.00	\$90.00
2021 State		Primary Unit	\$185.00	1.00000	\$0.00	\$185.00
2021 Appl		Primary Unit	\$100.00	2.00000	\$0.00	\$200.00

You may click on the "Quantity" field to change the quantity

ct Inline Edit View

ords

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Sugges
RPAC Cont		Primary Unit	\$1.00	1.00000	\$0.00	\$50.00	
2021 Local		Primary Unit	\$90.00	1.00000	\$0.00	\$90.00	
2021 Natli		Primary Unit	\$35.00	1.00000	\$0.00	\$35.00	
2021 Natli		Primary Unit	\$90.00	1.00000	\$0.00	\$90.00	
2021 State		Primary Unit	\$185.00	1.00000	\$0.00	\$185.00	
2021 Appl		Primary Unit	\$100.00	2.00000	\$0.00	\$200.00	

To simply remove the line item from the order, click the delete icon to the right.

Extended Amount | Suggestions

\$50.00	
\$90.00	
\$35.00	
\$90.00	
\$185.00	
\$200.00	

If you wish to add a line item not currently present on the order, click the plus icon to add a product.

Customer* | Total Amount | Balance

Alonso, N | \$600.00 | \$600.00

Extended Amount | Suggestions

\$90.00	
\$35.00	
\$90.00	



RAMCO Portal

Then choose existing product.

(Write in Product should never be used)

Customer: Alonso, N. | Total Amount: \$600.00 | Balance: \$600.00

Extended Amount | Suggestions

\$90.00
\$35.00
\$90.00
\$185.00

Existing Product
Write-in Product
Get Products

Search and choose the product you wish to add.

Search for records

Product Name	Properties	Unit	Price Per Unit	Quantity
2019 National Dues	2019 National Dues	Primary Unit		1.00000
2019 State Dues	2019 State Dues	Primary Unit		1.00000
2020 Local Dues	2020 Local Dues	Primary Unit	0	1.00000
2020 National Dues	2020 National Dues	Primary Unit	0	2.00000
2020 State Dues	2020 State Dues	Primary Unit		
2022 National Dues	2022 National Dues	Primary Unit		
2022 State Dues	2022 State Dues	Primary Unit		

Open the "Related Items" Menu

DU... > Orders > 2022 Annual Dues - ...

2022 Annual Dues - Primary REALTORS®

INVOICE | PROCESS | FULFILL ORDER | CANCEL ORDER

primary REALTORS®

Order Product Inline Edit View

Choose the "Dues Items" Entity

ramcosandbox.ramcoams.org/main.aspx#195833665

AMCO Sales & Accou... > Orders > 2022 Annual Dues - ...

Common | Related Record Sources | System

on Redemptions | Invoices | Contributions | Shopping Ca

uled Payments | Audit History | Dues Items | Pending Payr

cts | Connections | Publication Sub | Dues Items

Member Financials

ORD-01332-H1L1D0

2022 Annual Dues - Primary REALTORS®



RAMCO Portal

Choose the Dues Item Record

2022 Annual Dues - Primary REALTORS®

Dues Item Associated View ▾

+ ADD NEW DUES ITEM ADD EXISTING DUES ITEM BULK DELETE

✓	Membership ↑	Date Paid	Status Reason...	Dues Cycle	Dues Option
<input checked="" type="checkbox"/>	uttip-Sandbox06, Mike ~...		Pending	2022 Annual Dues	Primary REALTOR

Click on the Amount field to edit the amount

Primary REALTORS®
Mike - REALTOR

Full Payment
Primary REALTORS®

Dues Order Products

Group By: (no grouping) ▾

✓	Amount ▾	Opt Out ▾	Overridden ▾	
<input checked="" type="checkbox"/>	\$200.00	No	No	
	\$150.00	No	No	
	\$35.00	No	No	
	\$50.00	No	No	
	\$176.00	No	No	

Toggle the "Overridden" field to yes, anytime you change the price

Dues Order Products

Group By: (no grouping) ▾

✓	Amount ▾	Opt Out ▾	Overridden ▾	Dues Item	Dues Product
<input checked="" type="checkbox"/>	10.00	No	No	2022 Annual Dues - Pri	2022 Local
	\$150.00	No	No	2022 Annual Dues - Pri...	2022 Natio
	\$35.00	No	No	2022 Annual Dues - Pri...	2022 Natio
	\$50.00	No	No	2022 Annual Dues - Pri...	2022 RPAC
	\$176.00	No	No	2022 Annual Dues - Pri...	2022 State

You may want to open the line item to edit it in some cases. To open it, double click the row

es - Primary REALTORS®
06, Mike - REALTOR
es
R® - Full Payment
es - Primary REALTORS®

Dues Order Products

Group By: (no grouping) ▾

✓	Amount ▾	Opt Out ▾	Overridden ▾	
<input checked="" type="checkbox"/>	\$10.00	No	Yes	
<input type="checkbox"/>	\$150.00	No	No	
	\$35.00	No	No	
	\$50.00	No	No	
	\$176.00	No	No	



RAMCO Portal

Click and edit the amount field

Pricing

Amount	\$10.00
Overridden	Yes
Calculated	No
Opt Out *	No

Toggle overridden anytime you change the amount.

Pricing

Amount	\$ 20
Overridden	Yes
Calculated	No
Opt Out *	No

Click save to complete.

atus Active

atus Reason Active

unsaved changes

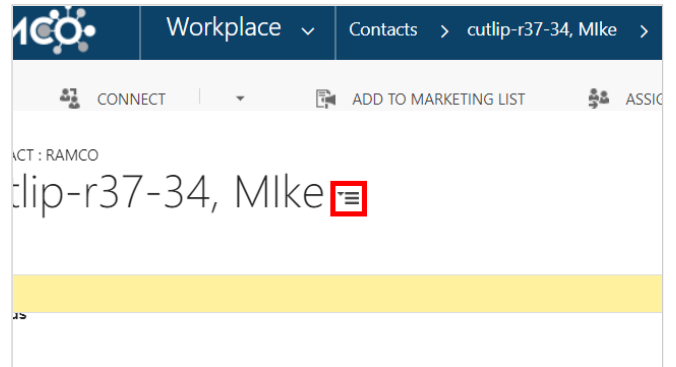
2.1.9. Process a Partial Refund

A partial refund in RAMCO takes several steps to complete. RAMCO can only refund the "Unapplied Funds" of a payment. So, to perform a partial refund, we need to make sure the amount we want refunded is shown in the unapplied funds field. To do this, we typically need to unapply the payment from the order, adjust the price of the order, then reapply the payment. This will leave the difference in the unapplied funds field.

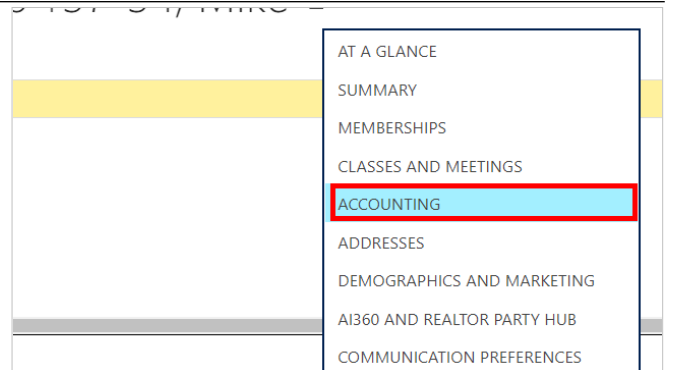


RAMCO Portal

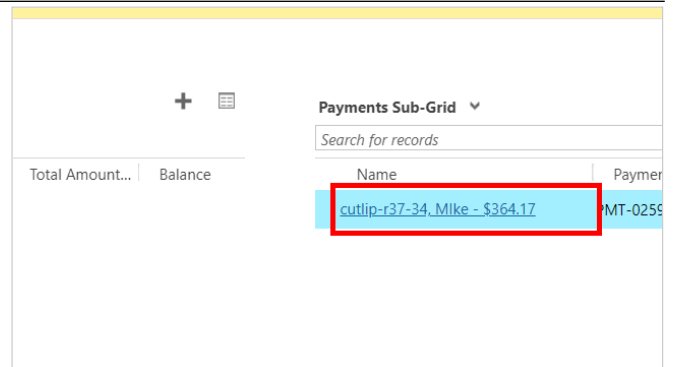
Use the hamburger icon to go to the accounting section



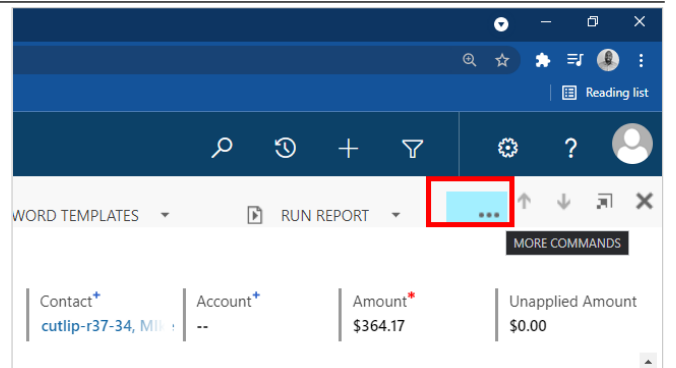
Click on the link **ACCOUNTING**



Click on the payment to unapply



Click on the command button **MORE COMMANDS**





RAMCO Portal

Click on the command button **Payment Wizard**

The screenshot shows the SAP Fiori 'Request Summary' app interface. At the top, there is a dark blue header bar with a 'Reading list' button on the right and a set of navigation icons (search, refresh, add, filter, settings, help, and user profile) in the center. Below the header, a light gray bar contains the text 'WORD TEMPLATES' on the left and a 'RUN REPORT' button on the right. The 'RUN REPORT' button has a dropdown menu open, displaying three options: 'Bulk Payment Application', 'Payment Wizard', and 'Form Editor'. The 'Payment Wizard' option is highlighted with a red rectangular box. Below this bar, the main content area displays a table with columns for 'Contact', 'Account', and 'Amount'. The first row shows 'Contact' as 'cutlip-r37-34, Mil...' and 'Amount' as '\$364.17'. At the bottom of the image, the text 'ECOMMERCE REQUEST SUMMARY' is visible.

Choose "Unapply some or all of the Payment"

What would you like to do with this payment?

☐ I want to **refund** the **entire amount** of this payment.

☐ I want to **unapply** some of this payment and **refund** the total unapp payment.

☐ I want to **unapply** some of this payment and **refund** only that amount.

☐ I want to **unapply** some or all of the amount applied from this payment.

☐ I want to **unapply** and **cancel** this payment.

Click continue

What would you like to do with this payment?

- ☐ I want to **refund** the **entire amount** of this payment.
- ☐ I want to **unapply** some of this payment and **refund** the total unpaid payment.
- ☐ I want to **unapply** some of this payment and **refund** only that amount.
- ☒ I want to **unapply** some or all of the amount applied from this payment.
- ☐ I want to **unapply** and **cancel** this payment.

Close

Continue

Check the box next to the invoice or invoices that need to be canceled.

Credit Card

\$364.17

--

--

--

--

--

--

--

Cancel Invoice

Return Inventory

No

No

Cancel any Contributions that



RAMCO Portal

Make sure cancel invoice is set to yes

The screenshot shows a form with a table containing two columns: 'Cancel Invoice' and 'Return Inventory'. The 'Cancel Invoice' column has a checked checkbox and a dropdown menu set to 'No'. The 'Return Inventory' column has a dropdown menu set to 'No'. A red box highlights the 'No' option in the 'Cancel Invoice' dropdown menu. Below the table, there is a checkbox labeled 'Cancel any Contributions that may exist for the Invoice'.

	Cancel Invoice	Return Inventory
<input checked="" type="checkbox"/>	No	No

☐ Cancel any Contributions that may exist for the Invoice

Click on the item **Yes** in the list

The screenshot shows the same form as the previous one, but the 'Cancel Invoice' dropdown menu is now open, showing 'Yes' and 'No' options. A red box highlights the 'Yes' option, which is highlighted in blue. The 'Return Inventory' dropdown menu remains set to 'No'. Below the table, there is a checkbox labeled 'Cancel any Contributions that may exist for the Invoice'.

	Cancel Invoice	Return Inventory
<input checked="" type="checkbox"/>	Yes	No

☐ Cancel any Contributions that may exist for the Invoice

Click on the button **Continue**

The screenshot shows the bottom of the form with three buttons: 'Back', 'Close', and 'Continue'. A red box highlights the 'Continue' button. Above the buttons, there is a checkbox labeled 'Cancel any Contributions that may exist for the Invoice' and a text field labeled 'Make refund to alternate Association or Account. [Optional]'.

☐ Cancel any Contributions that may exist for the Invoice

Make refund to alternate Association or Account. [Optional]

☐

Back Close Continue

Click submit to unapply

The screenshot shows a table with three rows: 'Refunded', 'Unapplied', and 'Status'. The 'Refunded' row has a value of '\$0.00'. The 'Unapplied' row has a value of '\$0.00'. The 'Status' row has a value of 'Inactive'. Below the table, there are three buttons: 'Back', 'Close', and 'Submit'. A red box highlights the 'Submit' button. At the bottom of the screen, there is a Windows taskbar with various icons.

Refunded	\$0.00
Unapplied	\$0.00
Status	Inactive

Back Close Submit



RAMCO Portal

Click close.

The payment is now unapplied, this will allow us to adjust the order amount.

Date	Method	Card
10/6/2021	Visa	***

[Close](#) [Print Receipt](#) [Perform](#)

Click on the contact to return to the contact record.

cutlip-r37-34, Mike - \$364.17

SUMMARY

Payment Number	PMT-02591-HDAGRT
Contact	cutlip-r37-34, Mike
Payment Type	Credit Card
Amount	\$364.17
Invoice Batch	--
Renewal Import	--

Use the hamburger icon to go to the accounting section

RAMCO Workplace Contacts > cutlip-r37-34, Mike

CONNECT ADD TO MARKETING LIST ASSIGNED

ACT: RAMCO

cutlip-r37-34, Mike

ACCOUNTING

Click on the link **ACCOUNTING**

cutlip-r37-34, Mike

- AT A GLANCE
- SUMMARY
- MEMBERSHIPS
- CLASSES AND MEETINGS
- ACCOUNTING**
- ADDRESSES
- DEMOGRAPHICS AND MARKETING
- AI360 AND REALTOR PARTY HUB
- COMMUNICATION PREFERENCES



RAMCO Portal

Click on the Order to be adjusted

ACCOUNTING		
Active Orders Sub-Grid (Contact and Acco... ▼		
Search for records 🔍		
Name	Order ID ↓	Sta
cutlip-r37-34, Mike - REALTOR	ORD-05428-D6M8G2	New

1. Click on the trash can icon to delete the line item OR.
2. Click and change the Price per Unit

	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
it	\$100.00	1.00000	\$0.00	\$100.00	
it	\$87.50	1.00000	\$0.00	\$87.50	
it	\$25.00	1.00000	\$0.00	\$25.00	
it	\$66.67	1.00000	\$0.00	\$66.67	
it	\$50.00	1.00000	\$0.00	\$50.00	

Click on the contact to return to the contact record.

Now that the bill is adjusted, we can apply the payment once again.

SUMMARY	
Order ID *	ORD-05428-D6M8G2
Name *	cutlip-r37-34, Mike - REALTOR
Customer *	cutlip-r37-34, Mike
Member List *	Non Member
Currency *	US Dollar
Assets Locked *	No
Postal Code	--

Use the hamburger icon to go to the accounting section

RAMCO	Workplace	Contacts	cutlip-r37-34, Mike
CONNECT		ADD TO MARKETING LIST	ASSIGN
ACT: RAMCO			
cutlip-r37-34, Mike ☰			
777-777-7777			

Click on the link **ACCOUNTING**

AT A GLANCE	
SUMMARY	
MEMBERSHIPS	
CLASSES AND MEETINGS	
ACCOUNTING	
ADDRESSES	
DEMOGRAPHICS AND MARKETING	
AI360 AND REALTOR PARTY HUB	
COMMUNICATION PREFERENCES	



RAMCO Portal

Once again click to open the payment

		Payments Sub-Grid ▾	
Search for records			
Total Amount...	Balance	Name	Payment
\$304.17	\$304	cutlip-r37-34_Mike - \$364.17	MT-0259

Click on the command button **MORE COMMANDS**

WORD TEMPLATES ▾ RUN REPORT ▾

Contact* Account* Amount* Unapplied Amount
cutlip-r37-34, MT-0259 -- \$364.17 \$364.17

Open the payment wizard.

WORD TEMPLATES ▾ RUN REPORT ▾

Bulk Payment Application
Payment Wizard
Other Activities
Form Editor

Contact* Account* Amount* Unapplied Amount
cutlip-r37-34, MT-0259 -- \$364.17 \$364.17

Click apply payment

Unapplied: \$364.17 | Refunded: \$0.00

What would you like to do with this payment?

☐ I want to **apply** this payment to an existing order / invoice.

☐ I want to **refund** the **entire amount** of this payment.

☐ I want to **cancel** this payment.

Close Continue



RAMCO Portal

then Click continue

What would you like to do with this payment?

☒ I want to **apply** this payment to an existing order / invoice.

☐ I want to **refund** the **entire amount** of this payment.

☐ I want to **cancel** this payment.

Choose Open Orders

☐ Open Orders

☒ Open Invoices

Invoice #	Date	Amount	Balance	Customer
There are no open invoices for this customer. To apply this payment to another, enter the invoice number in the search box and click Search.				

Then enter the amount of money from the payment, you wish to apply to this order.

Amount	Balance	Customer	Amount To Apply
04.17	\$304.17	cutlip-r37-34, Mike	<input type="text" value="0.00"/>

Current Unapplied: \$364.17

Total Amount to Apply: \$0.00

New Unapplied: \$364.17

When ready, click continue to proceed



RAMCO Portal

Click on the button **Submit**

Refunded	\$0.00
Unapplied	\$364.17
Status	Active

Now that the payment is applied, you will have unapplied funds available to refund.

To restart the payment wizard click "Perform Another Transaction"

Date	Method	Card/Check Number	Cu
10/6/2021	Visa	*****1111	cutlip-r

This time choose "I want to Refund the Unapplied Amount"

What would you like to do with this payment?

☐ I want to **apply** the remainder of this payment to an existing order /

☒ I want to **refund** the **unapplied amount** of this payment.

☐ I want to **refund** the **entire amount** of this payment.

☐ I want to **unapply** some of this payment and **refund** the total unapp payment.

☐ I want to **unapply** some of this payment and **refund** only that amou

☐ I want to **unapply** some or all of the amount applied from this paym

☐ I want to **unapply** and **cancel** this payment.

Click on the button **Continue**

☐ I want to **unapply** some of this payment and **ref** payment.

☐ I want to **unapply** some of this payment and **ref**

☐ I want to **unapply** some or all of the amount app

☐ I want to **unapply** and **cancel** this payment.



RAMCO Portal

Select a refund method.

How would you like to refund the payment?

☐ Issue a Check Refund

☐ Refund in Cash

☒ Refund Directly to Credit Card

Cancel any Contributions that may exist for the Invoice(s)

☐

Make refund to alternate Association or Account. [optional]

☐

Click on the button **Continue**

☐

Make refund to alternate Association or Account. [optional]

☐

Click submit to process the refund.

Refunded	\$0.00
Unapplied	\$60.00
Status	Active

The refund has been submitted.

Click close to complete.

Date	Method	Card
10/6/2021	Visa	***

pez, Reggie
10/6/2021 10:52 AM
pez, Reggie

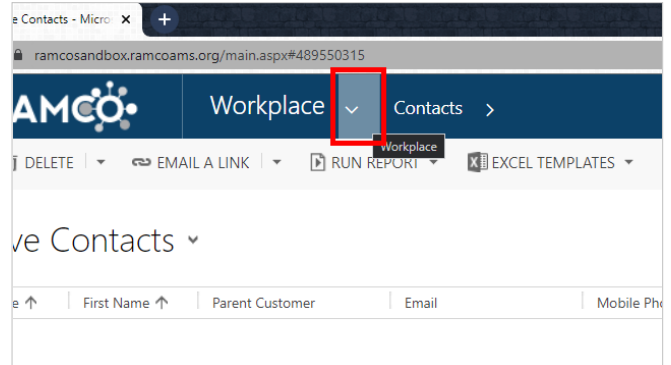
Please restart this assist from a contact record.



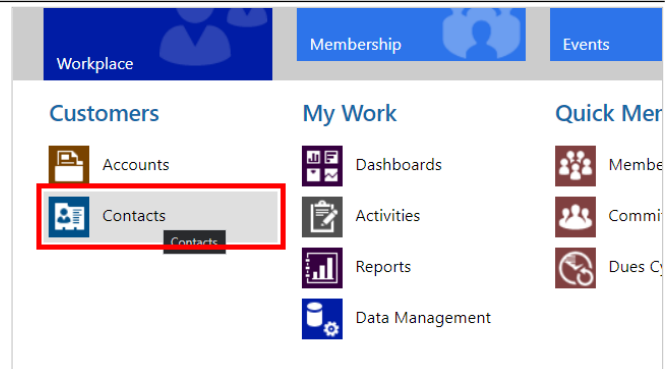
RAMCO Portal

2.1.10. Process a Payment

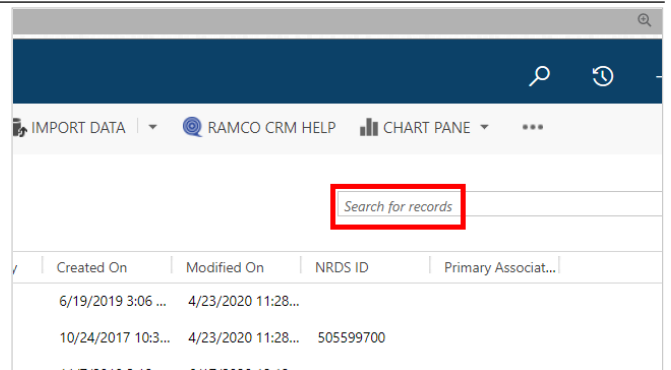
Open the Navigation Areas



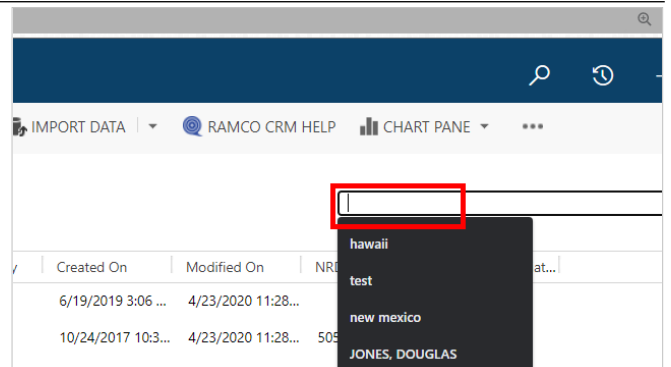
Click on the "Contacts" entity.



Click on the label **Search for records**



Search for the contact you wish to process payment for.



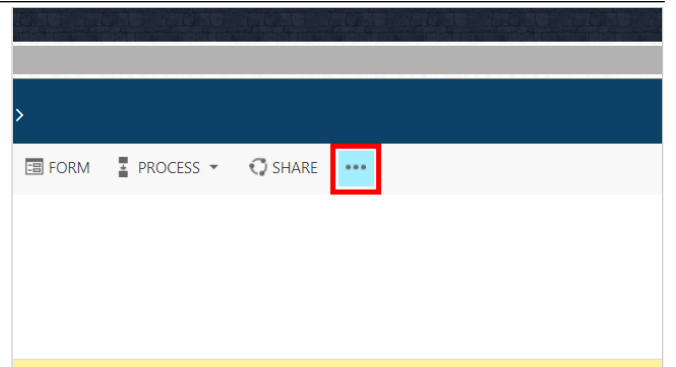


RAMCO Portal

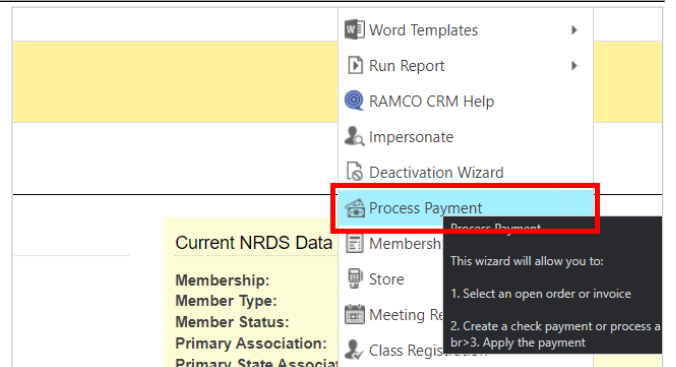
Select and open the contact record.

✓	Last Name ↑	First Name ↑	NRDS ID	Username	Parent Cust
✓	2019 Annual	Reggie		TestUser3958	Asset Realt
	Lopez	Reggie		TestUser3984	Asset Realt
	reggie lopez	test			

Click on the command button **MORE COMMANDS**



Click on the command button **Process Payment**



Select the Order or Orders from the list you wish to process payment for.

Select Items to Pay

Search orders for this customer only

	Order #	Order Name	Date	Amo
✓	ORD-01242-K8Q7Q3	2019 REALTOR® Dues	6/17/2020	\$3

1 Page Size: 10

Select Payment Type

Unapplied Payment



RAMCO Portal

Select the payment type drop down field.

<input checked="" type="checkbox"/>	ORD-01242-K8Q7Q3	2019 REALTOR® Dues	6/17/2020	\$3
-------------------------------------	------------------	--------------------	-----------	-----

1 Page Size: 10 ▼

Select Payment Type

▼

Unapplied Payment
Unapplied Credits

☐ Use Available Funds and Credits

Close Continue

Select the appropriate payment type.

1 Page Size: 10 ▼

Select Payment Type

▼

Unapplied Payment
Unapplied Credits

Check
Credit Card
Cash

Close Continue

Select continue to proceed to payment details.

Select Payment Type

Cash

▼

Unapplied Payment
Unapplied Credits

☐ Use Available Funds and Credits

Close Continue

1. Enter the appropriate payment details for your payment type.

300.00

Amount Received

Back Cancel Continue

Click continue to proceed to payment summary page.

Payment Amount

300.00

Amount Received

300

Back Cancel Continue



RAMCO Portal

Verify the orders selected and the payment details before pressing Submit. Press submit to process payment.

6/17/2020	Cash		
-----------	------	--	--

Click on the "Print Receipt" button if a receipt is desired.

6/17/2020	Cash		
-----------	------	--	--

Select close to exit the process payment wizard.

6/17/2020	Cash		
-----------	------	--	--

2.1.11. Processing a Bulk Refund

Click on the navigation button **Advanced Find**



RAMCO Portal

Click on the combo box **Look for:**

The screenshot shows the RAMCO Portal interface. On the left is a list of items with columns for License Number and Email. On the right is a search panel titled 'ADVANCED FIND'. The 'Look for:' dropdown menu is open, showing a list of options including 'Accounts', 'Goals', 'Import Jobs', 'Integration Agreements', 'Integration Change Items', 'Integration Logs', 'Invoice Credits', 'Invoice Distributions', 'Invoice Payments', 'Invoice Products', 'Invoices', 'Knowledge Article Incidents', 'Knowledge Article Views', 'Knowledge Articles', 'Knowledge Base Records', 'Languages', and 'Lead To Opportunity Sales Process'. The 'Accounts' option is highlighted.

Click on the item **in the list**

The screenshot shows the RAMCO Portal interface. On the left is a list of items with columns for License Number and Email. On the right is a search panel titled 'ADVANCED FIND'. The 'Look for:' dropdown menu is open, showing a list of options including 'Accounts', 'Goals', 'Import Jobs', 'Integration Agreements', 'Integration Change Items', 'Integration Logs', 'Invoice Credits', 'Invoice Distributions', 'Invoice Payments', 'Invoice Products', 'Invoices', 'Knowledge Article Incidents', 'Knowledge Article Views', 'Knowledge Articles', 'Knowledge Base Records', 'Languages', and 'Lead To Opportunity Sales Process'. The 'Invoice Payments' option is highlighted.

Click on the combo box

The screenshot shows the RAMCO Portal interface. On the left is a list of items with columns for License Number and Email. On the right is a search panel titled 'ADVANCED FIND'. The 'Look for:' dropdown menu is open, showing a list of options including 'Accounts', 'Goals', 'Import Jobs', 'Integration Agreements', 'Integration Change Items', 'Integration Logs', 'Invoice Credits', 'Invoice Distributions', 'Invoice Payments', 'Invoice Products', 'Invoices', 'Knowledge Article Incidents', 'Knowledge Article Views', 'Knowledge Articles', 'Knowledge Base Records', 'Languages', and 'Lead To Opportunity Sales Process'. The 'Invoice Payments' option is highlighted.

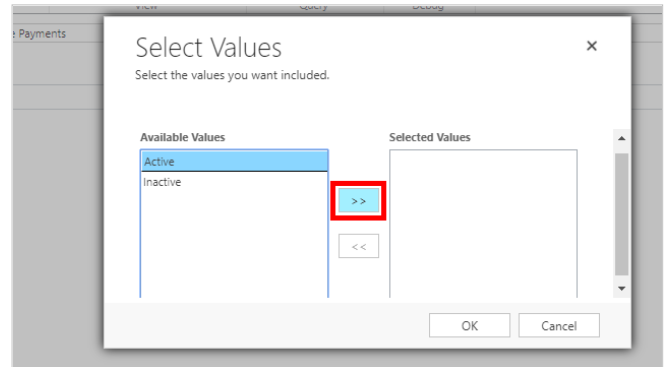
Click on the button **Select** or change the values for this field

The screenshot shows the Microsoft Dynamics 365 interface. On the left is a list of items with columns for License Number and Email. On the right is a search panel titled 'ADVANCED FIND'. The 'Look for:' dropdown menu is open, showing a list of options including 'Accounts', 'Goals', 'Import Jobs', 'Integration Agreements', 'Integration Change Items', 'Integration Logs', 'Invoice Credits', 'Invoice Distributions', 'Invoice Payments', 'Invoice Products', 'Invoices', 'Knowledge Article Incidents', 'Knowledge Article Views', 'Knowledge Articles', 'Knowledge Base Records', 'Languages', and 'Lead To Opportunity Sales Process'. The 'Invoice Payments' option is highlighted.

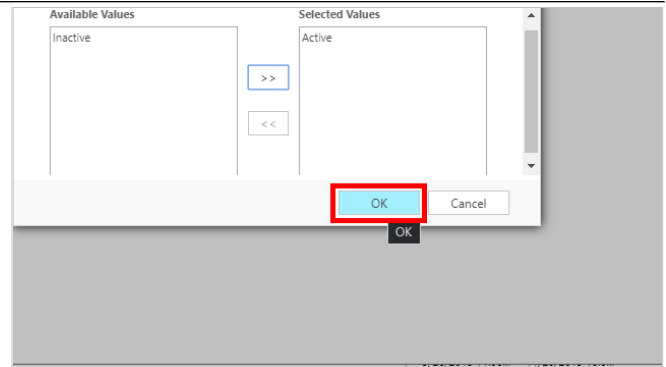


RAMCO Portal

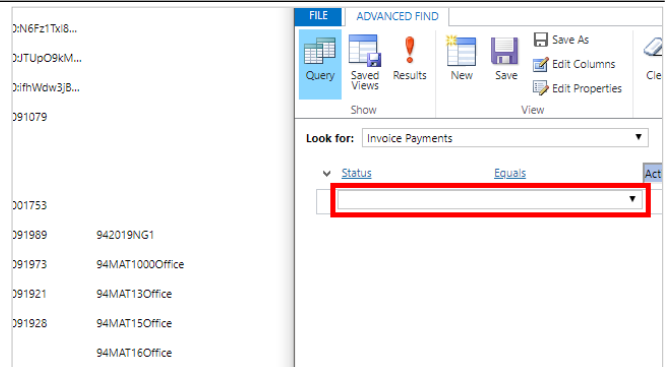
Click on the button >>



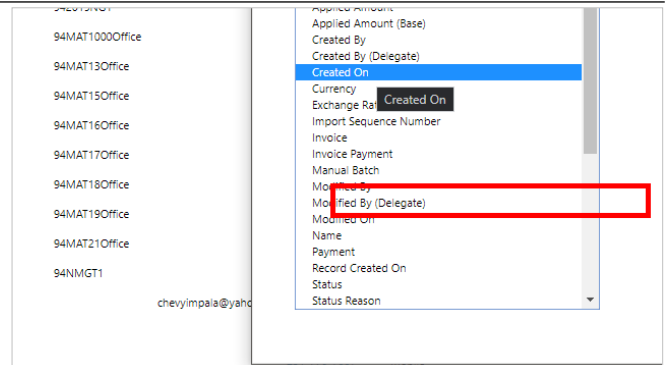
Click on the button OK



Click on the combo box



Click on the combo box





RAMCO Portal

Click on the combo box **on**

Click on the input field

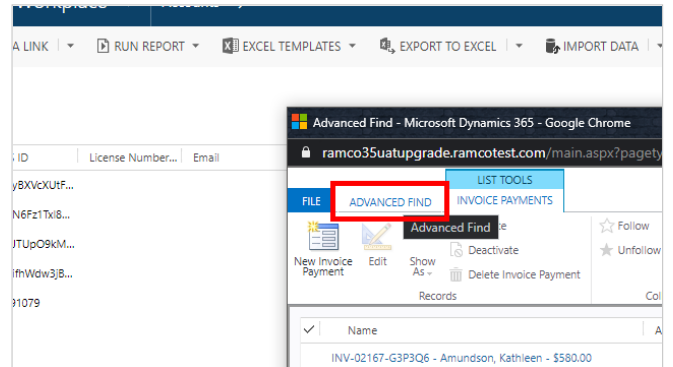
Enter the text **14**.

Click on the ribbon item **Results**

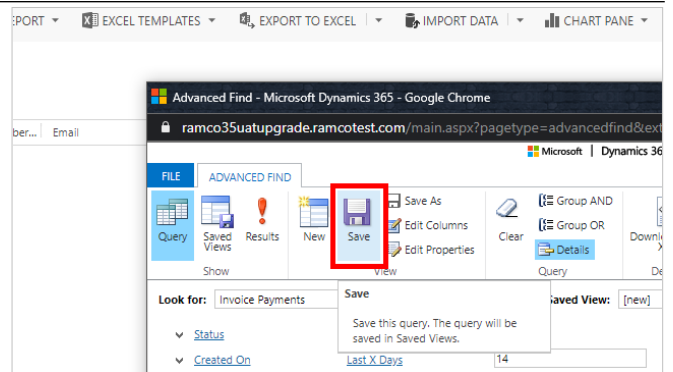


RAMCO Portal

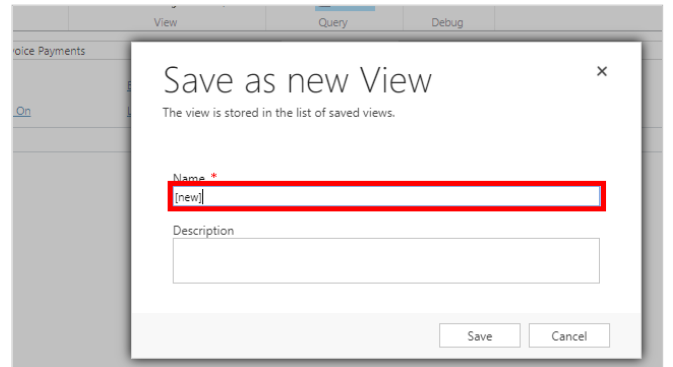
Click on the link **Advanced Find**



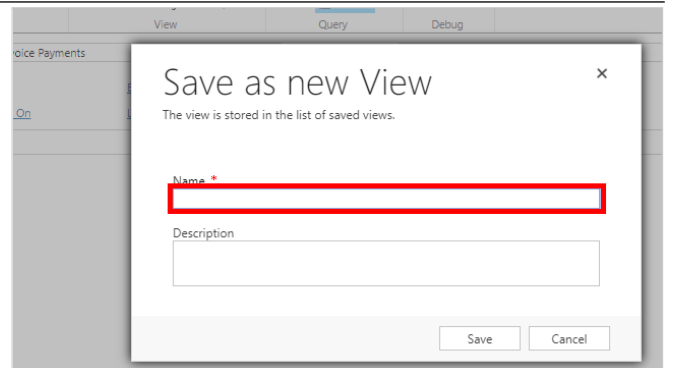
Click on the ribbon item **Save**



Click on the input field **Name**



Press the **Backspace** key 3 times.





RAMCO Portal

Enter **Name**.

Save as new View

The view is stored in the list of saved views.

Name *

Description

Save Cancel

Click on the button **Save**

Name *

Invoice Payment View

Description

Save Cancel

Save

Click on the navigation button **Workplace**

Accounts Active Accounts - Micro

ramco35uatupgrade.ramcotest.com/main.aspx#317825011

RAMCO Workplace Accounts

NEW DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT

Active Accounts

Account Name	NRDS ID	License Number...	Email	Main Phone	Stre
1000yBXVcXUf...					
1000:N6Fz1TxI8...					
1000JTUpO9KM...					

Click on the link **Sales & Accounting**

ramcotest.com/main.aspx#317825011

Workplace Accounts

Events Sales & Accounting Elections

Quick Membership Quick Events Quick Account

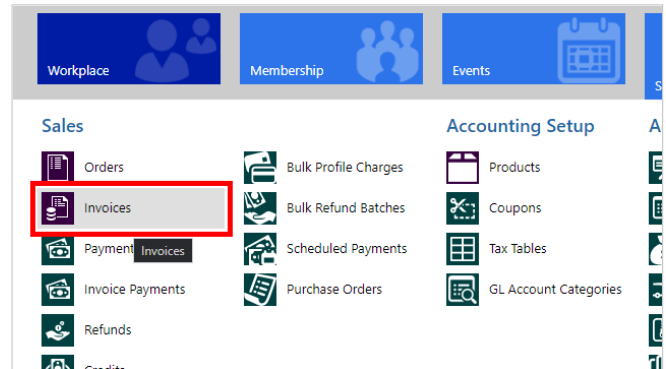
Memberships Courses Products

Committees Classes Orders

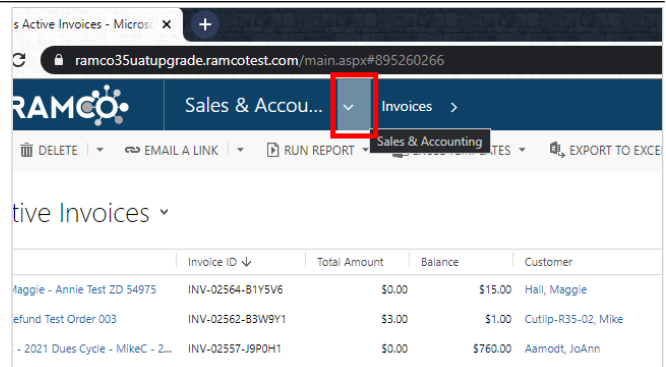


RAMCO Portal

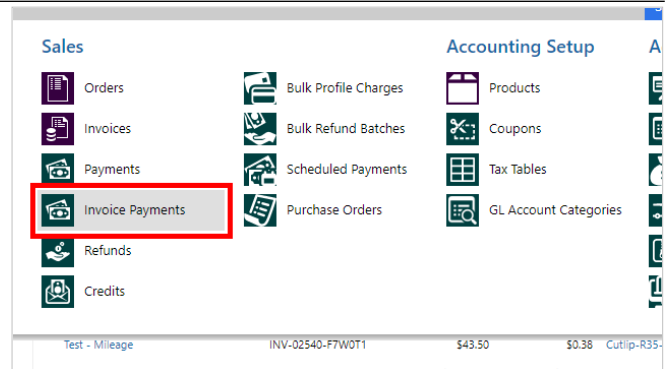
Click on the link **Invoices**



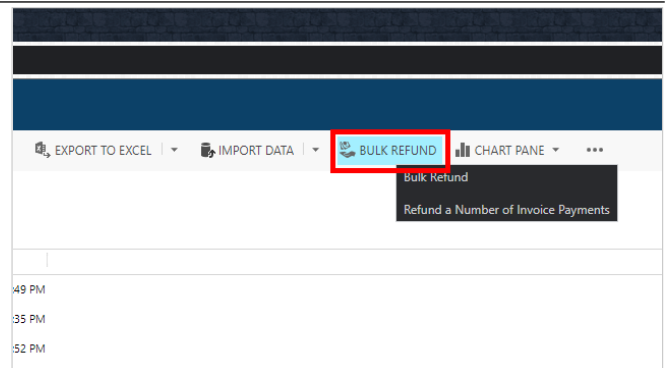
Click on the navigation button **Sales & Accounting**



Click on the link **Invoice Payments**



Click on the command button **Bulk Refund**





RAMCO Portal

Click on the combo box

WARNING - Refunds Cannot Be Reversed!

Be sure you are selecting the correct view for processing the intended refunds. cannot be reversed once you complete the wizard.

Select a view of Payments to Refund [optional]

Refund Type [optional]

Same as Payment Type

Cancel Continue

Click on the item **Invoice Payment View** in the list

Select a view of Payments to Refund [optional]

Active Invoice Payments
Inactive Invoice Payments
Invoice Payment View
Invoice Payments Sub-Grid (Invoice)
Invoice Payments Sub-Grid (Payment)
MikeC - Bulk Refund Wizard - Partial Refund test
MikeC - Bulk Refund Wizard - Partial Refund test 02
MikeC - Class I Want to Refund
MikeC - Test Bulk Refund 001

Click on the combo box **Both**

Refunds Cannot Be Reversed!

Be sure you are selecting the correct view for processing the intended refunds. You will be able to confirm the refunds on the following page, but the process cannot be reversed once you complete the wizard.

Select a view of Payments to Refund [optional]

Canceling of Orders and Invoices [optional]

Cancel Order and Invoice

Click on the item **Cancel Invoice Only** in the list

Refunds Cannot Be Reversed!

Be sure you are selecting the correct view for processing the intended refunds. You will be able to confirm the refunds on the following page, but the process cannot be reversed once you complete the wizard.

Select a view of Payments to Refund [optional]

Canceling of Orders and Invoices [optional]

Cancel Order and Invoice
Cancel Invoice Only
Do not Cancel Order or Invoice



RAMCO Portal

Click on the combo box **Same**

Be sure you are selecting the correct view for processing the intended refunds; cannot be reversed once you complete the wizard.

Select a view of Payments to Refund [optional]
Invoice Payment View

Refund Type [optional]
Same as Payment Type

Cancel Continue

Click on the item **in the list**

Select a view of Payments to Refund [optional]
Invoice Payment View

Refund Type [optional]
Same as Payment Type
Same as Payment Type
Issue a Check Refund
Refund in Cash

Click on the button **Continue**

Select a view of Payments to Refund [optional]
Invoice Payment View

Refund Type [optional]
Same as Payment Type

Cancel Continue

Click on the button **Submit**

		NDYOUUC	W4H356	
Fox, Thom	506090789	PMT-00634-HFYQF	INV-02553-M1D1N0	3/13/2
20191119, Proration	506092317	PMT-00633-GTFQIK	INV-02552-V7B7T4	3/13/2

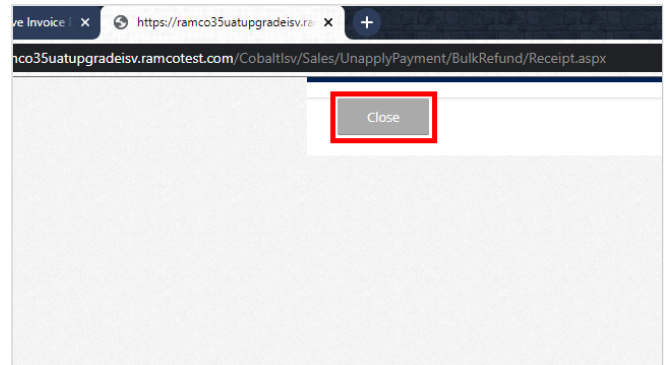
Number of Refunds to Issue: 12

Back Cancel Submit



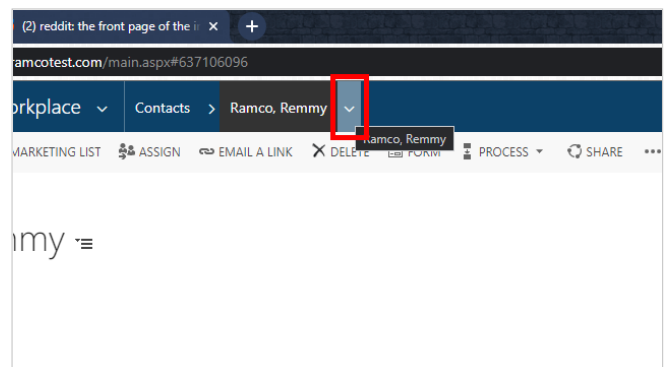
RAMCO Portal

Click on the button **Close**

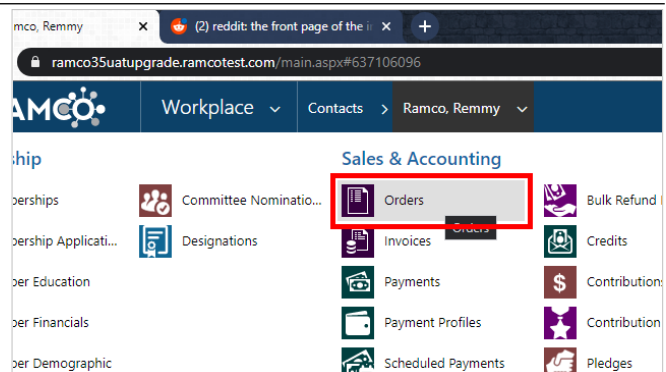


2.1.12. Waive a Fee

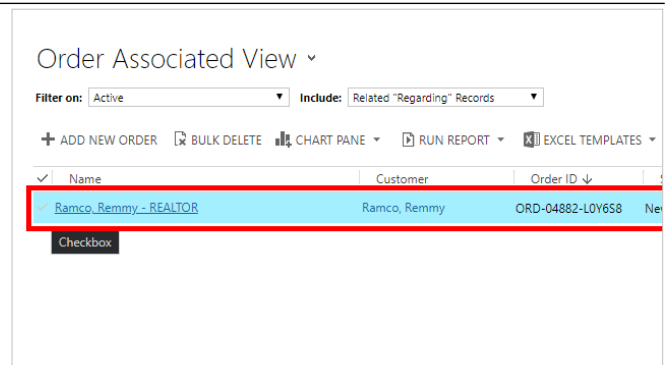
Click on the "View Related" button.



Click on the "Orders" entity.



Open an order record.





RAMCO Portal

Open the product record you wish to waive.

Order Product Inline Edit View

Search for records

Product Name	Properties	Unit	Price Per Unit	Quantity
MikeC - M		Primary Unit	\$50.00	1.00000
MikeC - 201		Primary Unit	\$35.00	1.00000
MikeC - 201		Primary Unit	\$150.00	1.00000
MikeC - 201		Primary Unit	\$200.00	1.00000
MikeC - R1		Primary Unit	\$25.00	1.00000
MikeC - 201		Primary Unit	\$170.00	1.00000

Set the "Pricing" field to override price.

General

Select Product Existing
Existing Product * MikeC - Membership Application Fee

Pricing

Pricing Use Default
Price Per Unit \$50.00
Volume Discount \$0.00
Quantity * 1.00000
Amount \$50.00
Manual Discount --
Tax --
Extended Amount \$50.00

Click on the field **Price Per Unit**

Select Product Existing
Existing Product * MikeC - Membership Application Fee

Pricing

Pricing Override Price
Price Per Unit * \$50.00
Volume Discount \$0.00 \$50.00
Quantity * 1.00000
Amount \$50.00
Manual Discount --
Tax --
Extended Amount \$50.00

Set the value to \$0.

Select Product Existing
Existing Product * MikeC - Membership Application Fee

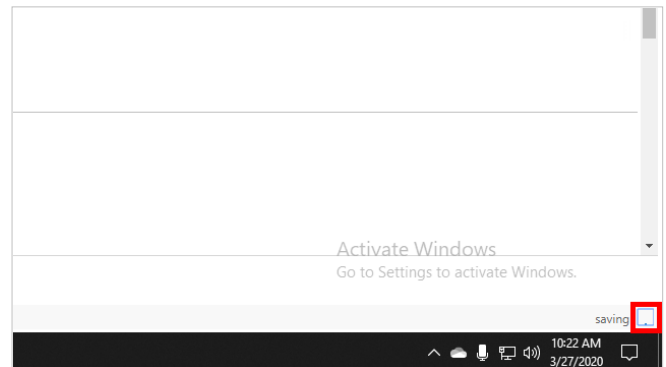
Pricing

Pricing Override Price
Price Per Unit * \$ 0
Volume Discount \$0.00
Quantity * 1.00000
Amount \$50.00
Manual Discount --
Tax --
Extended Amount \$50.00

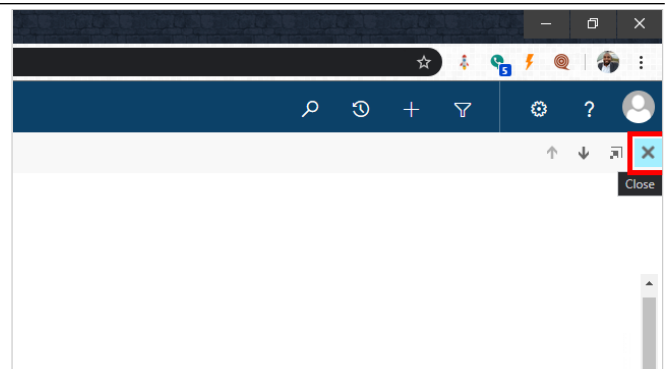


RAMCO Portal

Click on the save icon.



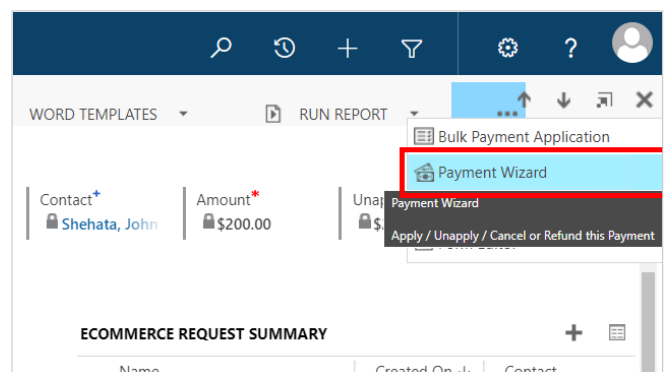
Click on the action button **Close**



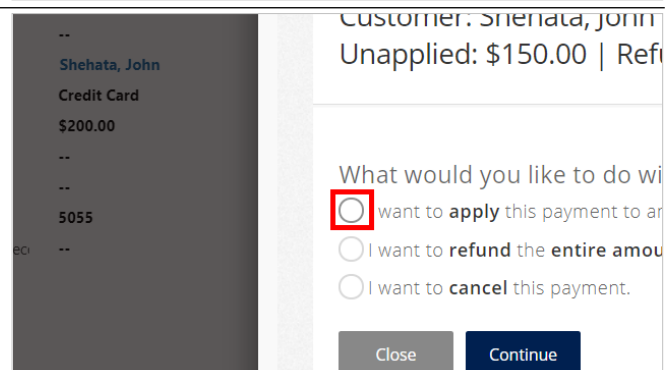
2.2. Editing Payments

2.2.1. Apply a Payment with Unapplied Funds

Click on the command button **Payment Wizard**



Choose "Apply this payment..." to apply it to an open order or invoice.





RAMCO Portal

Click on the button **Continue**

What would you like to do with this payment?

☒ I want to **apply** this payment to an existing order.

☐ I want to **refund** the **entire amount** of this payment.

☐ I want to **cancel** this payment.

You may need to choose orders, if there is no invoice to apply this payment to.

Customer: Shehata, John
Unapplied: \$150.00 | Refund

☐ Open Orders
☒ Open Invoices

Click into the "Amount to Apply" field

Amount	Balance	Customer	Amount To Apply
\$150.00	\$150.00	Shehata, John	<input type="text" value="0.00"/>
\$0.00	\$0.00	Shehata, John	<input type="text" value="0.00"/>

Current Unapplied: \$150.00

Then enter the amount you wish to apply

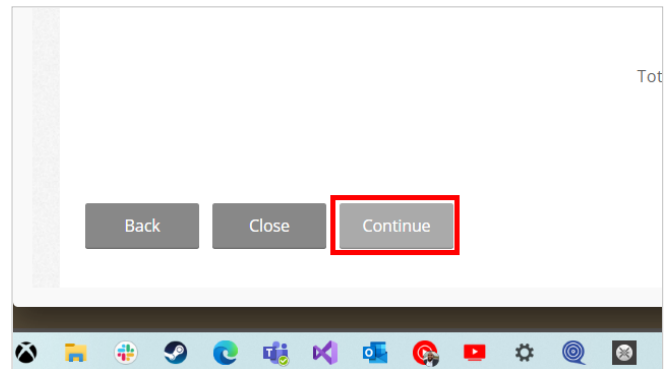
Amount	Balance	Customer	Amount To Apply
\$150.00	\$150.00	Shehata, John	<input type="text" value="\$"/>
\$0.00	\$0.00	Shehata, John	<input type="text" value="0.00"/>

Current Unapplied: \$150.00

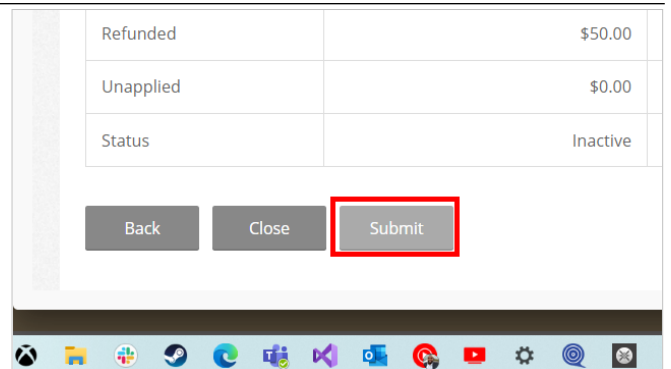


RAMCO Portal

Click on the button **Continue**



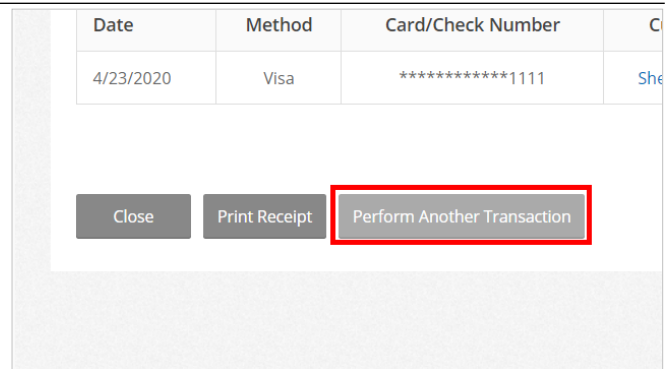
Click submit to perform the transaction.



You transaction should now be completed.

To continue working with this payment choose "Perform Another Transaction".

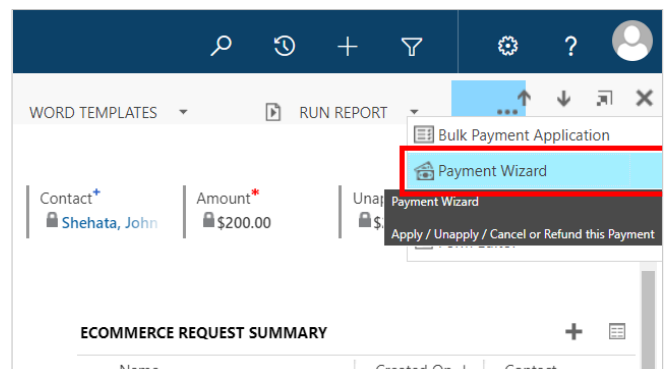
If you are finished, click on close to leave.



Please open the the payment then start this process again.

2.2.2. Cancel a Payment (Bounced Check or Duplicate Entry)

Click on the command button **Payment Wizard**





RAMCO Portal

Choose "Unapply and Cancel..." or "Cancel Payment..." to remove a payment that you did not receive.

Reasons for cancelling a payment could be a bounced check, a chargeback, or a check entered into RAMCO more than once.

Johnny
Shehata
None - Enter Address
123 Elm Street
--
Oz
Kansas
Last name, First name
23/2020 3:40 PM

☐ I want to refund the entire amount of this payment.
☐ I want to unapply some of this payment.
☐ I want to unapply some of this payment and refund the rest.
☐ I want to unapply some or all of the amount applied.
☒ I want to unapply and cancel this payment.

Close Continue

Click on the button **Continue**

None - Enter Address
123 Elm Street
--
Oz
Kansas
Last name, First name
23/2020 3:40 PM

☐ I want to unapply some of this payment and refund the rest.
☐ I want to unapply some of this payment and refund the rest.
☐ I want to unapply some or all of the amount applied.
☒ I want to unapply and cancel this payment.

Close Continue

Check the box next to the invoices you wish to cancel.

side note: you should always cancel the invoice if it is getting a refund or you plan to change the amount of the invoice

Shehata, John
Credit Card
\$200.00
--
--
5055
--
Johnny

The payment will be unapplied. Choose whether or not you want to return the inventory.

	Cancel Invoice	Return Inventory
<input checked="" type="checkbox"/>	Yes	No

Cancel any Contributions that

☐

If any contributions are being returned, you must also check this box so RAMCO reverses any previously made contribution records.

5055
--
Johnny
Shehata
None - Enter Address
123 Elm Street
--
Oz
Kansas

Cancel any Contributions that

☒

Make refund to alternate Ass

☐



RAMCO Portal

Click on the button **Continue**

Cancel any contributions that may exist for the invoice.

☐

Make refund to alternate Association or Account. [og

☐

Back Close **Continue**

Click submit to perform the transaction.

Refunded	\$50.00
Unapplied	\$0.00
Status	Inactive

Back Close **Submit**

You transaction should now be completed.

To continue working with this payment choose "Perform Another Transaction".

If you are finished, click on close to leave.

Date	Method	Card/Check Number	C
4/23/2020	Visa	*****1111	She

Close Print Receipt **Perform Another Transaction**

Please open the the payment then start this process again.

2.2.3. Editing Payments

You must have the payment record open to proceed.

Click on the command button **Payment Wizard**

WORD TEMPLATES RUN REPORT

Bulk Payment Application

Payment Wizard

Payment Wizard

Apply / Unapply / Cancel or Refund this Payment

ECOMMERCE REQUEST SUMMARY

Name	Created On	Contact
------	------------	---------



RAMCO Portal

Choose "...Unapply some or all of the amount applied"

What would you like to do with this payment?

- ☐ I want to **refund** the **entire amount** of this payment.
- ☐ I want to **unapply** some of this payment.
- ☐ I want to **unapply** some of this payment and **refund** the remainder.
- ☒ I want to **unapply** some or all of the amount applied to this payment.
- ☐ I want to **unapply** and **cancel** this payment.

Close Continue

Click on the button **Continue**

What would you like to do with this payment?

- ☐ I want to **unapply** some of this payment and **refund** the remainder.
- ☐ I want to **unapply** some of this payment and **refund** the remainder.
- ☒ I want to **unapply** some or all of the amount applied to this payment.
- ☐ I want to **unapply** and **cancel** this payment.

Close Continue

Check the box next to the invoices you wish to cancel.

side note: you should always cancel the invoice if it is getting a refund or you plan to change the amount of the invoice

The payment will be unapplied from the selected invoice. Choose whether or not you want to cancel the invoice.

	Cancel Invoice	Return Inventory
<input checked="" type="checkbox"/>	Yes	No

Cancel any Contributions that may exist for the Invoice

To return store items to inventory, open the menu under "Return Inventory"

The payment will be unapplied from the selected invoice. Choose whether or not you want to cancel the invoice.

	Cancel Invoice	Return Inventory	Invoice #	Date
<input checked="" type="checkbox"/>	Yes	No	INV-	3/29/2021

Cancel any Contributions that may exist for the Invoice



RAMCO Portal

Choose which store location the inventory should be returned to.

The payment will be unapplied from the selected invoice. Choose whether or not you want to cancel the invoice.

<input type="checkbox"/>	Cancel Invoice	Return Inventory	Invoice #	Date
<input checked="" type="checkbox"/>	Yes	No	INV-123456789	3/29/2021

☐ Cancel any Contributions that may exist for the Invoice.

Click on the button **Continue**

☐ Cancel any Contributions that may exist for the Invoice.

Make refund to alternate Association or Account. [Optional]

☐

If any contributions are being returned, you must also check this box so RAMCO reverses any previously made contribution records.

5055

Reo --

Johnny
Shehata
None - Enter Address
123 Elm Street
--
Oz
Kansas

☐ Yes ☐ No

☐ Cancel any Contributions that may exist for the Invoice.

Make refund to alternate Association or Account. [Optional]

☐

To issue refunds from a bank account other than your primary you must check this box

Shehata, John
Credit Card
\$200.00
--
--
5055
--

Johnny

The payment will be unapplied from the selected invoice. Choose whether or not you want to cancel the invoice.

<input type="checkbox"/>	Cancel Invoice	Return Inventory
<input checked="" type="checkbox"/>	Yes	No

☒ Cancel any Contributions that may exist for the Invoice.



RAMCO Portal

Click submit to proceed.

Johnny
Shehata
None - Enter Address
123 Elm STreet
--
Oz
Kansas
Last name, First name
10/23/2020 3:40 PM
Last name, First name

Cancel any Contributions that may exist for the invoice
☒

Make refund to alternate Association or Account.
☐

Back Close Continue

Click on the button **Continue**

Cancel any Contributions that may exist for the invoice
☒

Make refund to alternate Association or Account. [optional]
☒

Back Close Continue

Choose "Apply this payment..." to apply it to an open order or invoice.

Customer: Shehata, John
Unapplied: \$150.00 | Refund: \$50.00

What would you like to do with this payment?
☒ I want to **apply** this payment to an existing order or invoice
☐ I want to **refund** the **entire amount** of this payment
☐ I want to **cancel** this payment.

Close Continue

Click on the button **Continue**

What would you like to do with this payment?
☒ I want to **apply** this payment to an existing order or invoice
☐ I want to **refund** the **entire amount** of this payment
☐ I want to **cancel** this payment.

Close Continue



RAMCO Portal

You may need to choose orders, if there is no invoice to apply this payment to.

Customer: Shehata, John
Unapplied: \$150.00 | Ref

☐ Open Orders
☒ Open Invoices

Search

Click into the "Amount to Apply" field

Amount	Balance	Customer	Amount To Apply
\$150.00	\$150.00	Shehata, John	0.00
\$0.00	\$0.00	Shehata, John	0.00

Current Unapplied: \$150.00

Then enter the amount you wish to apply

Amount	Balance	Customer	Amount To Apply
\$150.00	\$150.00	Shehata, John	\$
\$0.00	\$0.00	Shehata, John	0.00

Current Unapplied: \$150.00

Click on the button **Continue**

Back Close Continue



RAMCO Portal

Choose "Refund the Unapplied..." to do a partial refund or choose "Refund the Entire amount" to do a full refund.

Shehata, John
Credit Card
\$200.00
--
--
5055
BO --
Johnny
Shehata

Unapplied: \$100.00 | Refund

What would you like to do with the unapplied amount?

- ☐ I want to **apply** the remainder of the payment.
- ☒ I want to **refund** the **unapplied amount**.
- ☐ I want to **refund** the **entire amount**.
- ☐ I want to **unapply** some of this payment.
- ☐ I want to **unapply** some of this payment and refund the remainder.

Click on the button **Continue**

Address
Street
City
State
Zip
Phone
Email

Johnny
Shehata

How would you like to refund the unapplied amount?

- ☐ I want to **unapply** some of this payment and refund the remainder.
- ☐ I want to **unapply** some of this payment and refund the entire amount.
- ☐ I want to **unapply** some or all of the amount applied.
- ☐ I want to **unapply** and **cancel** this payment.

Close Continue

Choose how you wish to issue the refund.

side note: Credit Card refunds will automatically be processed through ecommerce and take approximately 3 business days to complete.

Cash and checks refunds will be updated in RAMCO's ledger, but must be issued to the member by a staff person.

Johnny
Shehata

How would you like to refund the unapplied amount?

- ☐ Issue a Check Refund
- ☐ Refund in Cash
- ☒ Refund Directly to Credit Card

Cancel any Contributions that have been applied to this account.
☐

Make refund to alternate Association or Account. [Optional]

Click on the button **Continue**

Make refund to alternate Association or Account. [Optional]

☒

Back Close Continue



RAMCO Portal

Choose the Association ID field

Address	\$150.00	
	Association ID	Am
	Distribution #1	<input type="text"/>
	Distribution #2	<input type="text"/>
	Distribution #3	<input type="text"/>
Distribution	<input type="text"/>	<input type="text"/>

Then enter the Association ID or NRDS number of the institution to issue the refund.

Address	\$100.00	
	Association ID	Am
	Distribution #1	<input type="text" value="4"/>
	Distribution #2	<input type="text"/>
	Distribution #3	<input type="text"/>
Distribution	<input type="text"/>	<input type="text"/>

Choose the "Bank Account ID" field

n ID	Amount	Bank Account ID
<input type="text"/>	<input type="text" value="15"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Then enter the bank number where the refund should be issued from

n ID	Amount	Bank Account ID
<input type="text"/>	<input type="text" value="15"/>	<input type="text" value="2"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>



RAMCO Portal

Finally choose the amount field

d Amount:

	Association ID	Amount	Bank Ac
ution	4035		
ution			
ution			

Then enter the dollar amount of the refund from this bank account.

Side Note: You can use the additional rows to refund different amounts from different banks. The total of the refund must match the unapplied amount of this payment in order to proceed.

d Amount:

	Association ID	Amount	Bank Ac
ution	4035	1	
ution			
ution			

Click on the button **Continue**

Distribution #5		
Distribution #6		
<div>Back Cancel Continue</div>		

Click on the button **Continue**

Distribution #5		
Distribution #6		
<div>Back Cancel Continue</div>		



RAMCO Portal

Click on the button **Submit**

Refunded	\$50.00
Unapplied	\$100.00
Status	Active

BackCloseSubmit

Choose "Unapply and Cancel..." or "Cancel Payment..." to remove a payment that you did not receive.

Reasons for cancelling a payment could be a bounced check, a chargeback, or a check entered into RAMCO more than once.

Johnny
Shehata
None - Enter Address
123 Elm Street
--
Oz
Kansas
Last name, First name
23/2020 3:40 PM

☐ I want to **refund** the **entire amount** of this payment.

☐ I want to **unapply** some of this payment.

☐ I want to **unapply** some of this payment.

☐ I want to **unapply** some or all of this payment.

☒ I want to **unapply and cancel** this payment.

CloseContinue

Click on the button **Continue**

Address
Street
ne
ne

☐ I want to **unapply** some of this payment and **refund** the rest.

☐ I want to **unapply** some of this payment and **refund** the rest.

☐ I want to **unapply** some or all of the amount applied.

☒ I want to **unapply and cancel** this payment.

CloseContinue

Enter your reason for cancelling this payment.

Address

What's the reason for cancelling this payment?

Cancel any Contributions that may exist for

☒



RAMCO Portal

Click on the button **Continue**

Cancel any contributions that may exist for the invoice.

☒

Make refund to alternate Association or Account. [og

☐

Click on the button **Close**

Shehata, John

Credit Card

\$200.00

--

--

5055

--

Johnny

Date	Method	C
4/23/2020	Visa	

Click on the button **Continue**

ORD:01ZTZ-
C4M6K8

3/4/2020

\$0.00

\$0.00

John

Tot

Click submit to perform the transaction.

Refunded	\$50.00
Unapplied	\$0.00
Status	Inactive



RAMCO Portal

Your transaction should now be completed.

To continue working with this payment choose "Perform Another Transaction".

If you are finished, click on close to leave.

Date	Method	Card/Check Number	C
4/23/2020	Visa	*****1111	She

ClosePrint ReceiptPerform Another Transaction

Please open the the payment then start this process again.

2.2.4. Issue a Refund (From a Secondary Bank Account)

You must have the payment record open to proceed.

Click on the command button **Payment Wizard**

WORD TEMPLATES RUN REPORT

Bulk Payment Application

Payment Wizard

Payment Wizard

Apply / Unapply / Cancel or Refund this Payment

ECOMMERCE REQUEST SUMMARY

Name Created On Contact

Choose "Refund the Unapplied..." to do a partial refund or choose "Refund the Entire amount" to do a full refund.

Shehata, John

Credit Card

\$200.00

5055

Johnny

Shehata

Unapplied: \$100.00 | Refund

What would you like to do with the unapplied amount?

☐ I want to apply the remainder of the payment.

☒ I want to refund the unapplied amount.

☐ I want to refund the entire amount.

☐ I want to unapply some of this payment.

☐ I want to unapply some of this payment and refund the remainder.

Click on the button **Continue**

☐ I want to unapply some of this payment and refund the remainder.

☐ I want to unapply some of this payment and refund the remainder.

☐ I want to unapply some or all of the amount applied.

☐ I want to unapply and cancel this payment.

CloseContinue



RAMCO Portal

Choose how you wish to issue the refund.

side note: Credit Card refunds will automatically be process through ecommerce and take approximately 3 business days to complete.

Cash and checks refunds will be updated in RAMCO's ledger, but must be issued to the member by a staff person.

Shehata, John
Credit Card
\$200.00
--
--
5055
--
Johnny
Shehata

How would you like to refund

☐ Issue a Check Refund

☐ Refund in Cash

☒ Refund Directly to Credit Card

Cancel any Contributions that

☐

Make refund to alternate Ass

Check the box next to the invoices you wish to cancel.

side note: you should always cancel the invoice if it is getting a refund or you plan to change the amount of the invoice

Shehata, John
Credit Card
\$200.00
--
--
5055
--
Johnny
Shehata

The payment will be unapplied
choose whether or not you wa

<input type="checkbox"/>	Cancel Invoice	Return Inventory
<input checked="" type="checkbox"/>	Yes	No

Cancel any Contributions that

☐

Make refund to alternate Ass

If any contributions are being returned, you must also check this box so RAMCO reverses any previously made contribution records.

5055
--
Johnny
Shehata
None - Enter Address
123 Elm STreet
--
Oz
Kansas

<input type="checkbox"/>	Yes	No
<input checked="" type="checkbox"/>		

Cancel any Contributions that

☒

Make refund to alternate Ass

☐

To issue refunds from a bank account other than your primary you must check this box

Johnny
Shehata
None - Enter Address
123 Elm STreet
--
Oz
Kansas

Cancel any Contributions that

☒

Make refund to alternate Ass

☒

Back Close Continue



RAMCO Portal

Click on the button **Continue**

Cancel any contributions that may exist for the invoice

☒

Make refund to alternate Association or Account. [og

☒

Choose the Association ID field

\$150.00

	Association ID	Am
Distribution #1	<input type="text"/>	<input type="text"/>
Distribution #2	<input type="text"/>	<input type="text"/>
Distribution #3	<input type="text"/>	<input type="text"/>
Distribution	<input type="text"/>	<input type="text"/>

Then enter the Association ID or NRDS number of the institution to issue the refund.

\$100.00

	Association ID	Am
Distribution #1	<input type="text" value="4"/>	<input type="text"/>
Distribution #2	<input type="text"/>	<input type="text"/>
Distribution #3	<input type="text"/>	<input type="text"/>
Distribution	<input type="text"/>	<input type="text"/>

Choose the "Bank Account ID" field

n ID	Amount	Bank Account ID
<input type="text" value="15"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>



RAMCO Portal

Then enter the bank number where the refund should be issued from

Association ID	Amount	Bank Account ID
	15	2

Finally choose the amount field

Unapplied Amount:

	Association ID	Amount	Bank Account ID
Contribution	4035		
Contribution			
Contribution			

Then enter the dollar amount of the refund from this bank account.

Side Note: You can use the additional rows to refund different amounts from different banks. The total of the refund must match the unapplied amount of this payment in order to proceed.

Unapplied Amount:

	Association ID	Amount	Bank Account ID
Contribution	4035	1	
Contribution			
Contribution			

Click on the button **Continue**

Distribution #5		
Distribution #6		

Back Cancel **Continue**



RAMCO Portal

Click submit to perform the transaction.

Refunded	\$50.00
Unapplied	\$0.00
Status	Inactive

BackCloseSubmit

Your transaction should now be completed.

To continue working with this payment choose "Perform Another Transaction".

If you are finished, click on close to leave.

Date	Method	Card/Check Number	C
4/23/2020	Visa	*****1111	Shehata, John

ClosePrint ReceiptPerform Another Transaction

Please open the payment then start this process again.

2.2.5. Issue a Refund (Simple Refund)

You must have the payment record open to proceed.

Click on the command button **Payment Wizard**

WORD TEMPLATES

RUN REPORT

Bulk Payment Application

Payment Wizard

Payment Wizard

Apply / Unapply / Cancel or Refund this Payment

ECOMMERCE REQUEST SUMMARY

Name	Created On	Contact
Shehata, John		

Choose "Refund the Unapplied..." to do a partial refund or choose "Refund the Entire amount" to do a full refund.

Shehata, John

Credit Card

\$200.00

--

--

5055

--

Johnny

Shehata

Unapplied: \$100.00 | Refund

What would you like to do with the unapplied amount?

☐ I want to **apply** the remainder of the unapplied amount to my payment.

☒ I want to **refund the unapplied amount**.

☐ I want to **refund the entire amount** of this payment.

☐ I want to **unapply** some of this payment.

☐ I want to **unapply** some of this payment.



RAMCO Portal

Click on the button **Continue**

Close Continue

Check the box next to the invoices you wish to cancel.

Side Note: you should always cancel the invoice if it is getting a refund or you plan to change the amount of the invoice

Shehata, John
Credit Card
\$200.00
--
--
5055
--
Johnny

The payment will be unapplied choose whether or not you want to return the inventory.

	Cancel Invoice	Return Inventory
<input checked="" type="checkbox"/>	Yes	No

Cancel any Contributions that may exist for the invoice.

Choose how you wish to issue the refund.

Side Note: Credit Card refunds will automatically be processed through ecommerce and take approximately 3 business days to complete.

Cash and checks refunds will be updated in RAMCO's ledger, but must be issued to the member by a staff person.

Shehata, John
Credit Card
\$200.00
--
--
5055
--
Johnny
Shehata

How would you like to refund?

☐ Issue a Check Refund
☐ Refund in Cash
☒ Refund Directly to Credit Card

Cancel any Contributions that may exist for the invoice.

Make refund to alternate Association or Account.

Click on the button **Continue**

Back Close Continue



RAMCO Portal

Click submit to perform the transaction.

Refunded	\$50.00
Unapplied	\$0.00
Status	Inactive

BackCloseSubmit

Your transaction should now be completed.

To continue working with this payment choose "Perform Another Transaction".

If you are finished, click on close to leave.

Date	Method	Card/Check Number	C
4/23/2020	Visa	*****1111	She

ClosePrint ReceiptPerform Another Transaction

Please open the the payment then start this process again.

2.2.6. Return Items to Inventory (During Refund or Unapplying Funds)

You must have the payment record open to proceed.

Click on the command button **Payment Wizard**

WORD TEMPLATES

RUN REPORT

Bulk Payment Application

Payment Wizard

Payment Wizard

Apply / Unapply / Cancel or Refund this Payment

Contact*

Amount*

Unap

Shehata, John

\$200.00

\$

ECOMMERCE REQUEST SUMMARY

Name

Created On

Contact



RAMCO Portal

Choose to unapply or refund the payment

What would you like to do with this payment?

☐ I want to **refund** the entire amount of this payment.

☐ I want to **unapply** some of this payment.

☐ I want to **unapply** some of this payment and **refund** the rest.

☒ I want to **unapply** some or all of this payment.

☐ I want to **unapply** and **cancel** this payment.

Click on the button **Continue**

What would you like to do with this payment?

☐ I want to **unapply** some of this payment and **refund** the rest.

☐ I want to **unapply** some of this payment and **refund** the rest.

☒ I want to **unapply** some or all of the amount applied to this invoice.

☐ I want to **unapply** and **cancel** this payment.

Check the box next to the invoices you wish to cancel.

side note: you should always cancel the invoice if it is getting a refund or you plan to change the amount of the invoice

The payment will be unapplied from the selected invoice. Choose whether or not you want to cancel the invoice.

	Cancel Invoice	Return Inventory
<input checked="" type="checkbox"/>	Yes	No

Cancel any Contributions that may exist for the Invoice: ☐

To return store items to inventory, open the menu under "Return Inventory"

The payment will be unapplied from the selected invoice. Choose whether or not you want to cancel the invoice.

	Cancel Invoice	Return Inventory	Invoice #	Date
<input checked="" type="checkbox"/>	Yes	No	INV-	3/29/2021

Select the location to which you want to return the quantity of the products:

Cancel any Contributions that may exist for the Invoice: ☐



RAMCO Portal

Choose which store location the inventory should be returned to.

The payment will be unapplied from the selected invoice. Choose whether or not you want to cancel the invoice.

<input type="checkbox"/>	Cancel Invoice	Return Inventory	Invoice #	Date
<input checked="" type="checkbox"/>	Yes	No	INV-12345	3/29/2021

Cancel any Contributions that may exist for the Invoice.

☐

Click on the button **Continue**

Cancel any Contributions that may exist for the Invoice.

☐

Make refund to alternate Association or Account. [Optional]

☐

Click submit to perform the transaction.

Refunded	\$50.00
Unapplied	\$0.00
Status	Inactive

You transaction should now be completed.

To continue working with this payment choose "Perform Another Transaction".

If you are finished, click on close to leave.

Date	Method	Card/Check Number	Cardholder Name
4/23/2020	Visa	*****1111	Sheila

Please open the the payment then start this process again.

2.2.7. Unapply a Payment

You must have the payment record open to proceed.



RAMCO Portal

Click on the command button **Payment Wizard**

The screenshot shows the RAMCO Portal interface. At the top, there is a navigation bar with icons for search, refresh, add, filter, settings, help, and user profile. Below this, there is a section for 'WORD TEMPLATES' and a 'RUN REPORT' button. A dropdown menu is open, showing options: 'Bulk Payment Application', 'Payment Wizard' (highlighted with a red box), and 'Payment Wizard' (with a sub-menu 'Apply / Unapply / Cancel or Refund this Payment'). Below the dropdown, there is a section for 'ECOMMERCE REQUEST SUMMARY' with a table containing columns for Name, Created On, and Contact. The table has one row with the name 'Shehata, John' and an amount of '\$200.00'.

Choose "...Unapply some or all of the amount applied"

The screenshot shows a dialog box titled 'What would you like to do with this payment?'. It contains four radio button options: 'I want to refund the entire amount', 'I want to unapply some of this payment', 'I want to unapply some or all of the amount applied' (selected and highlighted with a red box), and 'I want to unapply and cancel this payment'. There are 'Close' and 'Continue' buttons at the bottom.

Click on the button **Continue**

This screenshot is identical to the previous one, showing the 'What would you like to do with this payment?' dialog box. In this view, the 'Continue' button is highlighted with a red box.

Check the box next to the invoices you wish to cancel.

side note: you should always cancel the invoice if it is getting a refund or you plan to change the amount of the invoice

The screenshot shows a dialog box titled 'The payment will be unapplied'. It contains a table with three columns: 'Cancel Invoice', 'Return Inventory', and an empty column. The first row has a checkbox (highlighted with a red box) in the 'Cancel Invoice' column, a 'Yes' dropdown in the 'Return Inventory' column, and a 'No' dropdown in the empty column. Below the table, there is a section titled 'Cancel any Contributions that' with a checkbox.



RAMCO Portal

If any contributions are being returned, you must also check this box so RAMCO reverses any previously made contribution records.

5055
Rec --
Johnny
Shehata
None - Enter Address
123 Elm STreet
--
Oz
Kansas

☐ Yes ☐ No

Cancel any Contributions that may exist for the invoice ☐

Make refund to alternate Association or Account. ☐

Click on the button **Continue**

Cancel any Contributions that may exist for the invoice ☐

Make refund to alternate Association or Account. ☐

Back Close **Continue**

Click submit to perform the transaction.

Refunded	\$50.00
Unapplied	\$0.00
Status	Inactive

Back Close **Submit**

You transaction should now be completed.

To continue working with this payment choose "Perform Another Transaction".

If you are finished, click on close to leave.

Date	Method	Card/Check Number	C
4/23/2020	Visa	*****1111	She

Close Print Receipt **Perform Another Transaction**

Please open the the payment then start this process again.



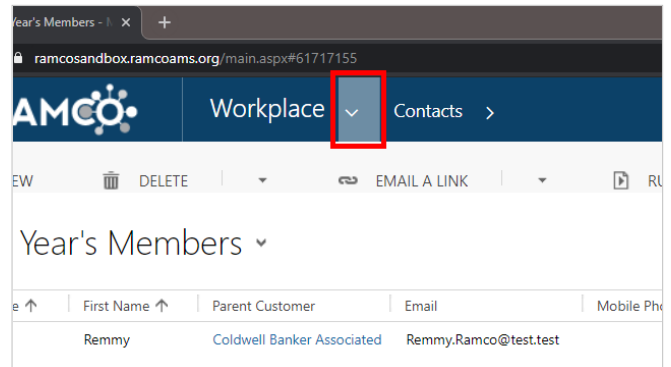
RAMCO Portal

2.3. Dues or Subscription Renewals Setup

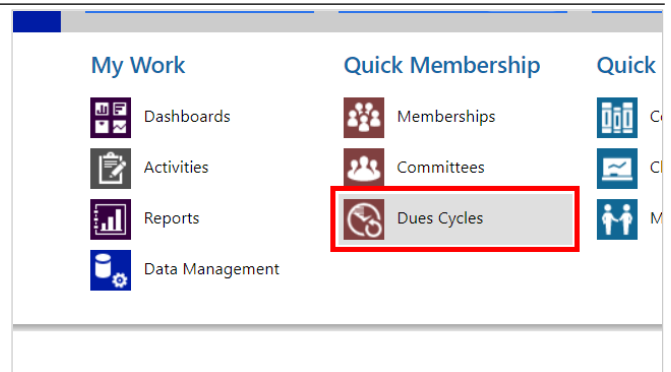
2.3.1. Add a Dues Option

This process will cover adding a dues option to a dues schedule. Dues options are RAMCO's way of offering choices to dues payment. For example, you may want to offer a payment plan option as well as a pay in full option. Each of those would be a "Dues Option".

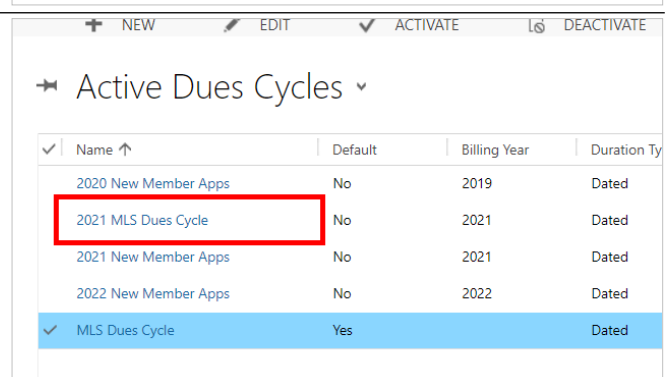
Open the Navigation Areas



Click on "Dues Cycles"



Choose a "Dues Cycle"





RAMCO Portal

Choose a "Dues Schedule"

DUES SCHEDULES

Name ↑	Dues Cycle
Primary Agent	2021 Dues Ren

Click on the plus symbol (+) to add an additional "Dues Option"

DUES SCHEDULES

Default	Duration Type...	Begin Date	End Date	Term
No	Dated	1/1/2021 12:00 ...	1/1/2022 12:00 ...	
Yes	Dated	1/1/2021 12:00 ...	1/1/2022 12:00 ...	
No	Dated	1/1/2021 12:00 ...	1/1/2022 12:00 ...	

Enter a name for the dues option

Active Dues Options

Name ↑
2021 New Primary REALTOR®
Primary Agents - Full Payment
Primary Agents - Payment Plan

A "Dues Schedule" may only have 1 default "Dues Option". The rest are optional and will need eligibility dates to indicate when a member may choose that option.

New Dues Option

Name * N

Dues Schedule *

Default * ☐

Publish To Portal *

Default to Payment PI *

Split Option *

Sort Order

Active Dues Prod

New Primary Realtors with Sentrilock

New Member Discount (Free)

New Portal Account Setup

New Primary Realtors w/o Sentrilock

New Primary Realtors wo/o Sentrilock

Non-Members



RAMCO Portal

Enter eligibility begin date only if this is not the default "Dues Option"

newal

Name * New Payment : Primary Agent

Dues Schedule * No

Default * --

Eligibility Begin Date * --

Eligibility End Date * --

Publish To Portal * Yes

Default to Payment PI * No

Split Option * Split

Sort Order * --

Active Dues Product

Name ↑

To enable this content, create

Enter eligibility end date only if this is not the default "Dues Option"

Name * New Payment : Primary Agent

Dues Schedule * No

Default * --

Eligibility Begin Date * --

Eligibility End Date * --

Publish To Portal * Yes

Default to Payment PI * No

Split Option * Split

Sort Order * --

Active Dues Products

Name ↑

To enable this content, create

Click save to create the dues option. Repeat these steps to create more "Dues Options"

After create a "Dues Option", your next step will be to add all the "Dues Products" associated with that "Dues Option".

gent x +

sandbox.ramcoams.org/main.aspx#688443410

Workplace

DEACTIVATE DELETE

RAMCO

Agent

SAVE SAVE & CLOSE

DUES OPTION : RAMCO

New Dues Option

2.3.2. Charge a Specific Product on a Payment Plan Date

Open the Navigation Areas

Year's Members - x +

ramcosandbox.ramcoams.org/main.aspx#794429432

Workplace

Contacts

EMAIL A LINK

Year's Members

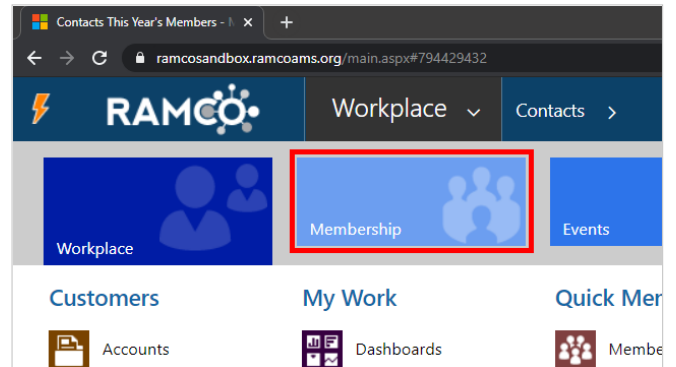
First Name ↑ Parent Customer Email Mobile Ph

Remmy Coldwell Banker Associated Remmy.Ramco@test.test

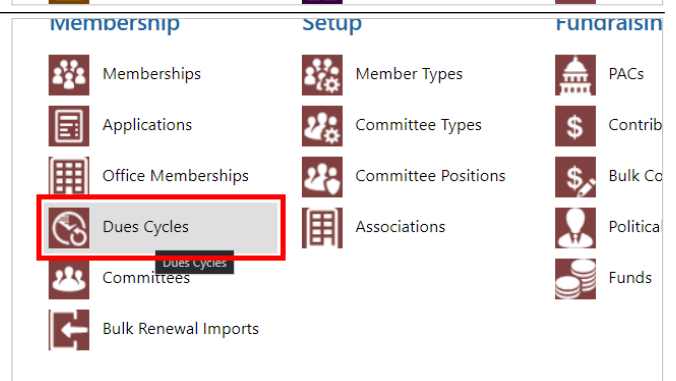


RAMCO Portal

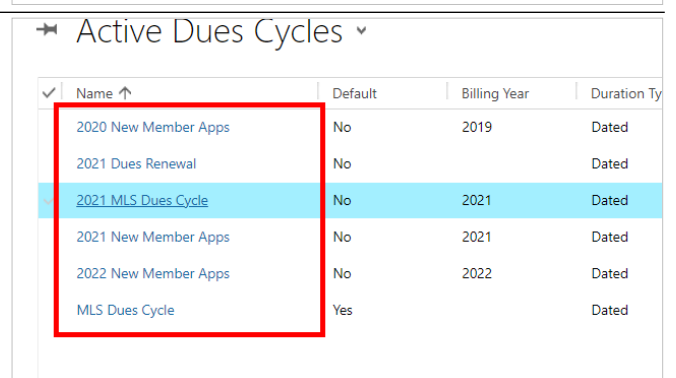
Choose the Membership area



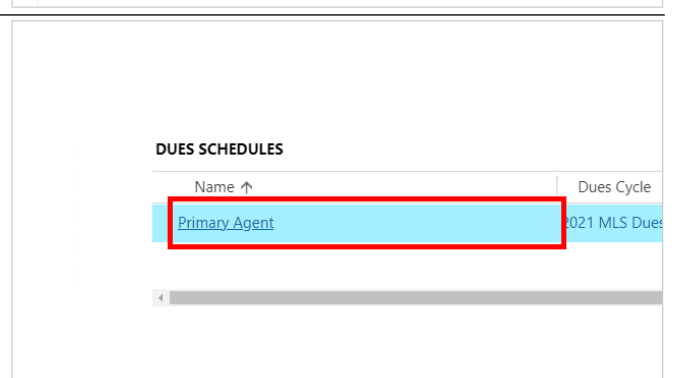
Select the Dues Cycle entity



Open the dues cycle with the installment plan



Open the schedule with the installment plan





RAMCO Portal

Choose the dues option for the installment plan.

Active Dues Options ▾

Name ↑

Primary Agents - Full Payment

Each payment schedule represents one payment in an installment plan.

Select a payment schedule where you want the payment to be for a specific product or products on the renewal bill.

Payment Schedules

Name ↑	Begin Date
1/1/2021 - 2/1/2021	1/1/2021

Click on the link **Add Product record.**

Does not match a product in Dues Products.)

Status	Publish To Onl...	Publish to PO...	Quantity On ...	Taxable
Active	No	No		No

Click on the magnifying glass to search for products.

You must use a product that is listed in the dues products for this dues product.

If you select a product, that is not a part of the dues option, this will not work.

Does not match a product in Dues Products.)

Status	Publish To Onl...	Publish to PO...	Quantity On ...	Taxable

Select a value.

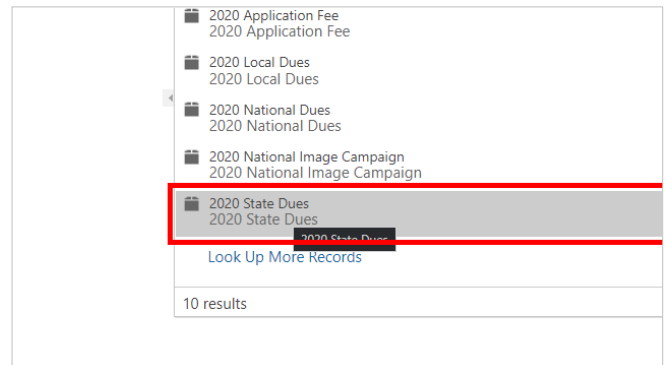


RAMCO Portal

Choose a product from the list.

RAMCO will now charge only this product during this payment schedule.

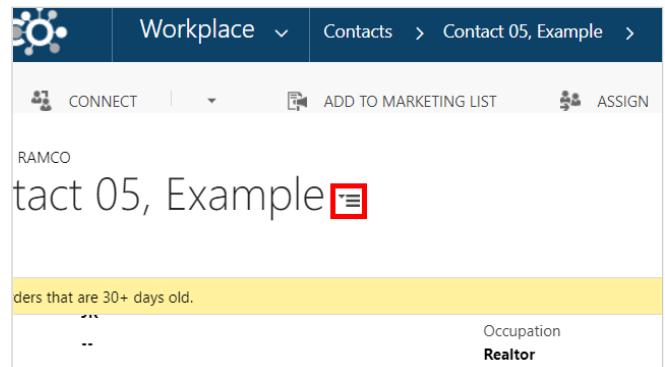
If you wish for RAMCO to collect multiple products during this payment schedule, simply repeat this process.



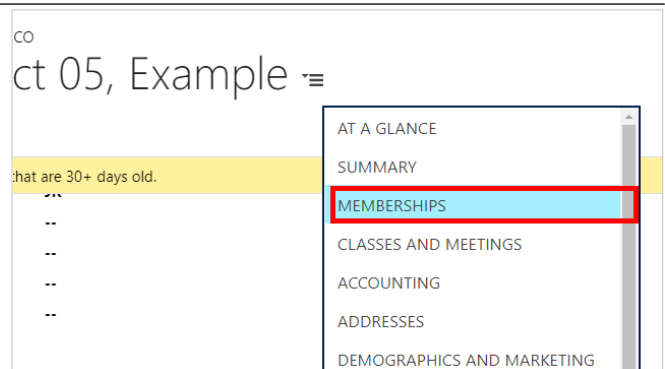
WARNING: All products have a number associated with them called "Remittance Application Order". Even if you tell RAMCO to collect a certain product first, the remittance application must also be first. If not, RAMCO will incorrectly distribute the money through Ecommerce. Because of this we recommended having RAMCO check your setup for accuracy before launching your dues billing

2.3.3. Recalculate a Dues Item

Click on the link **Form Sections**



Click on the link **MEMBERSHIPS**





RAMCO Portal

Choose a membership to recalculate the dues.

MEMBERSHIPS				
Membership Sub-Grid				
Search for records				
Primary ...	Contact ↑	NRDS ID	Member Type...	Membe
Yes	Contact 05, Example	M88800005	REALTOR	R

Open the dues item to recaculate

Dues Items Sub-Grid	
Membership	Date
Contact 05, Example - REALTOR	

Change the pricing strategy date

Reinstatement Fee Applied
6/5/2000 12:00 AM

Click Save.

RAMCO will now recalulate the dues item.

Status	Active
Status Reason	Pending

unsaved changes

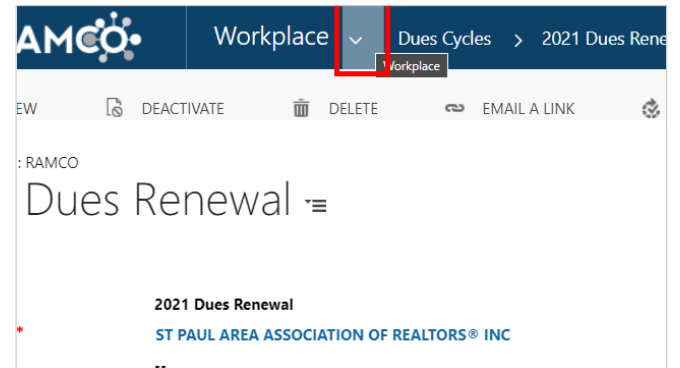
Please restart this assist from a contact record.



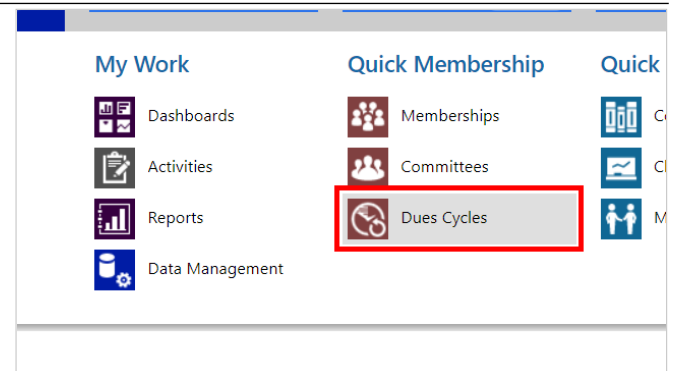
RAMCO Portal

2.3.4. Schedule Dues Late Fees

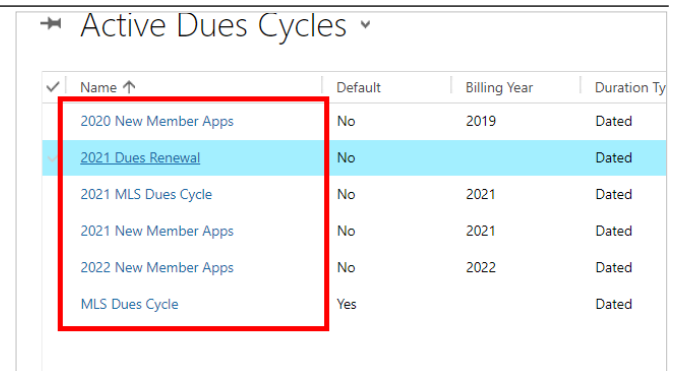
Open the Navigation Areas, and go to Workplace.



Choose the Dues Cycle entity.



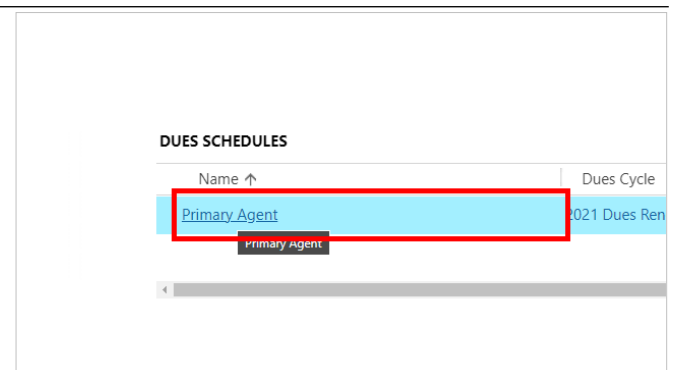
Click on the name of the dues cycle, you wish to schedule a late fee for.



Make sure each schedule has the appropriate late fee associated with it.

Schedules without a late fee, will not be issued a late fee.

Open the dues schedule to verify.





RAMCO Portal

If necessary add a late fee here for the first late fee.

Primary Agent

Primary Agent
2021 Dues Renewal
REALTOR

Fee

Fee 2

statement Fee

er Source

If you charge a second late fee, add it here.

Primary Agent

Primary Agent
2021 Dues Renewal
REALTOR

Fee

Fee 2

statement Fee

er Source

Click on the Dues Cycle to return to it.

SCHEDULE : RAMCO

Primary Agent

Primary Agent
2021 Dues Renewal
REALTOR

Fee

Fee 2

statement Fee

er Source

Use the Apply Late Fee Date field to schedule the late fee.

On the designated date and time, RAMCO will add a late fee to all unpaid bills, using the late fee present on the dues schedules.

Begin Date * 1/1/2021 12:00 AM

End Date * 1/1/2022 12:00 AM

Automatic Cycle Management

Apply Late Fee Date

Apply Late Fee 2 Date

Deactivate Membership Date

Close Dues Cycle Date

Was Late Fee Auto-Triggered?

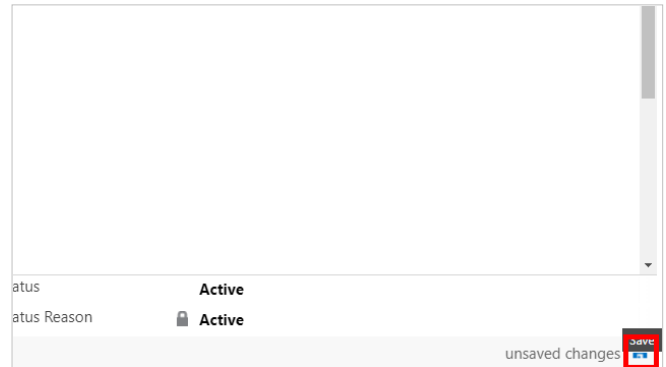
Was Deactivate Membership Auto-Triggered?

Was Close Dues Cycle Auto-Triggered?



RAMCO Portal

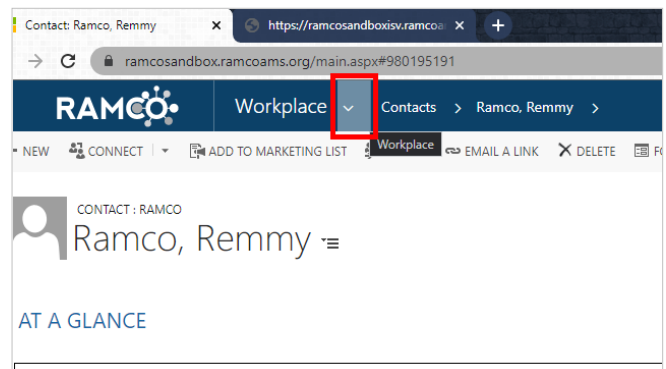
Click Save to complete the process.



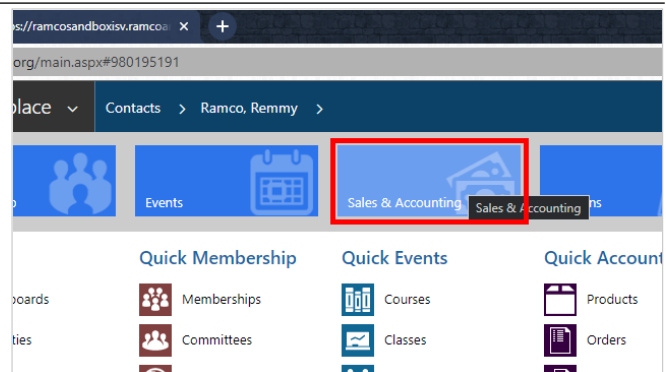
2.4. Store Management

2.4.1. Add a store location

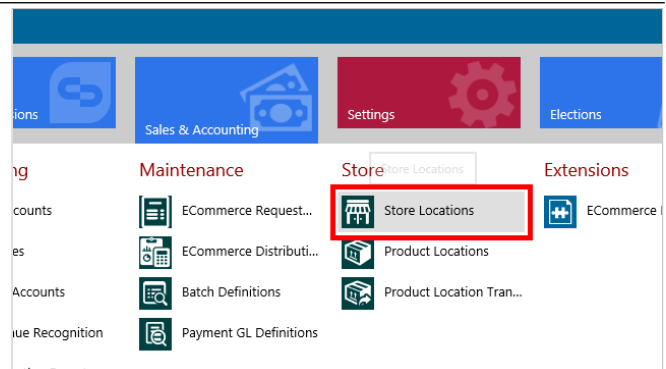
Open Navigation Areas



Click on the navigation area **Sales & Accounting**



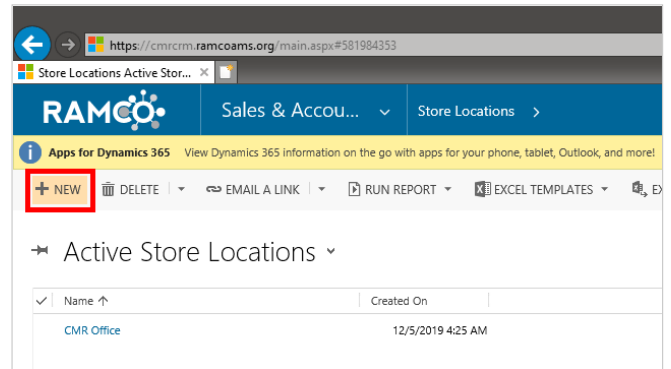
Click on the link **Store Locations**





RAMCO Portal

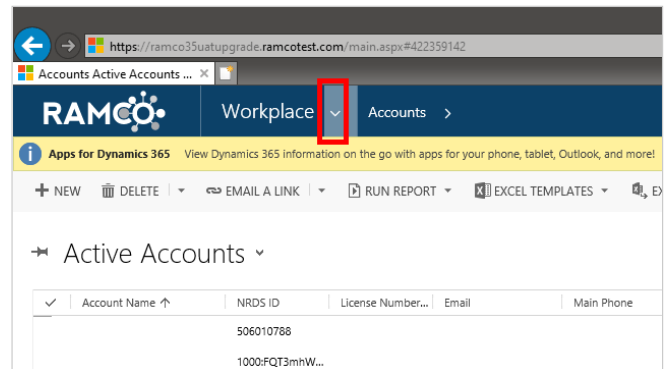
Click "New" to create a new store location



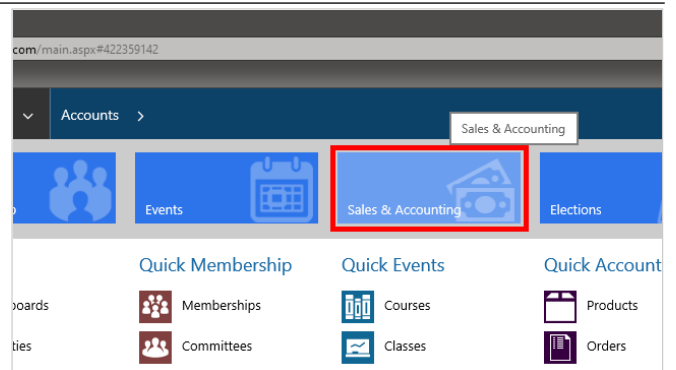
Enter the store name and address, then Click "Save" to save this store location.

2.4.2. Inventory Transfer Wizard

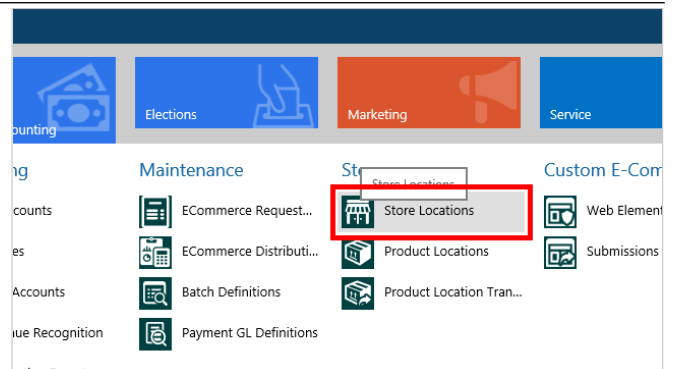
Open the Navigation Areas



Click on the "Sales & Accounting" navigation area.



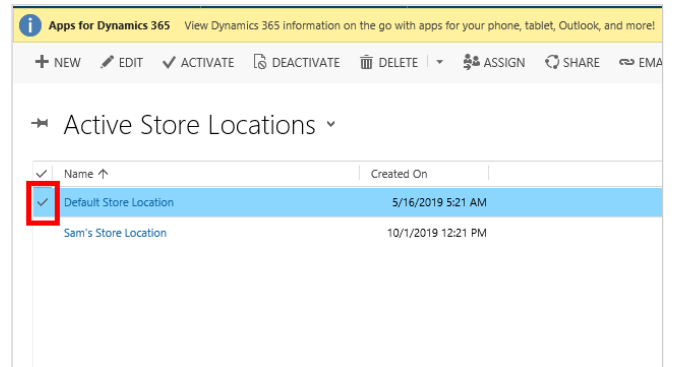
Click on the "Store Locations" entity.



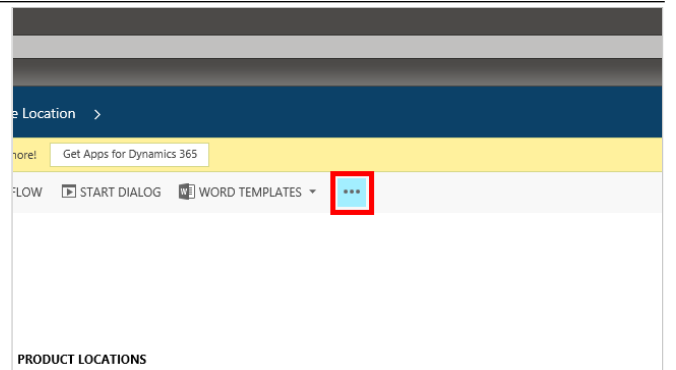


RAMCO Portal

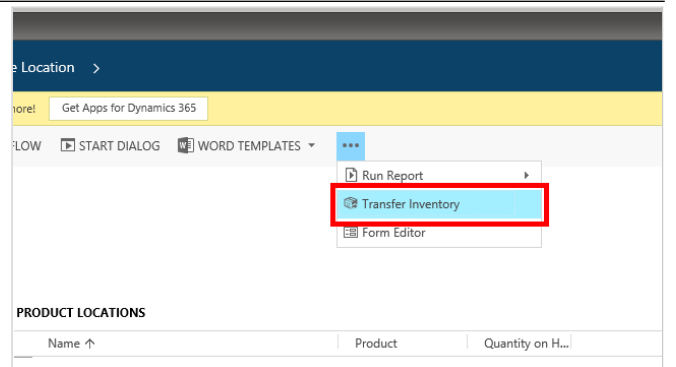
Open a store location to transfer inventory from.



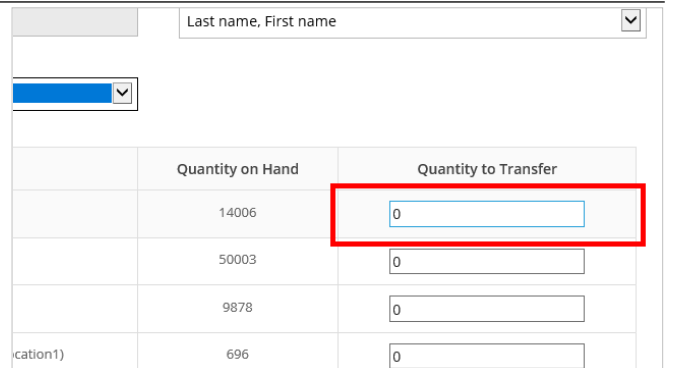
Click on the item **MORE COMMANDS**



Click on the "Transfer Inventory" wizard.



Select the "Quantity to Transfer" field for the product or products to transfer their inventory.





RAMCO Portal

Enter the amount of inventory to be transferred.

	Last name, First name	
	Quantity on Hand	Quantity to Transfer
	14006	<input type="text"/>
	50003	0
	9878	0
cation1)	696	0

Select the authorizing user drop down field.

Search...	
Authorizing User	
	Last name, First name
	Quantity on Hand
	14006
	Quantity to Transfer
	1000

Select the user authorizing the transfer.

Search...	
Authorizing User	
	Last name, First name
	Cutlip, Mike
	Lopez, Reggie
	Shehata, John
	Fox, Thom
	McCormick, Donna
	INTEGRATION
	SYSTEM
	Quantity on Hand
	14006
	Quantity to Transfer
	1000

Select the "Store Location" to receive the transferred inventory.

deisyv.ram... X	
Original Store Location	
Default Store Location	
Destination Store Location	
Sam's Store Location	
Product Name	
1 big dog (1bd)	
Activity Description (2314432)	



RAMCO Portal

Click "Initiate Transfer" to submit the transfer.

Store Product 072 (StoreID072)
Store Product 744 (StoreID744)
Varun's Messed Up Product (VMUP20)

Cancel Initiate Transfer

Click close to close the wizard.

Produ
1 big dog - Default Store Lo

Close

2.4.3. Item Receipt Wizard for Purchase Orders

The new PO Wizard is designed to simplify item receipts.

https://ramco35uatupgrade.ramcoportal.com/main.aspx#566859880

Purchase Order: 2 Store Location: Workplace Accounts Active Accounts - ...

RAMCO Workplace Accounts

Apps for Dynamics 365 View Dynamics 365 information on the go with apps for your phone, tablet, Outlook, and more!

+ NEW DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES

Active Accounts

✓	Account Name ↑	NRDS ID	License Number...	Email	Main Phone
		506010788			
		070005022			

Click on the "Sales and Accounting" navigation area.

https://ramco35uatupgrade.ramcoportal.com/main.aspx#566859880

Accounts Active Store Location: Accounts Active Accounts - ...

Accounts

Events Sales & Accounting Elections

Quick Membership Quick Events Quick Account

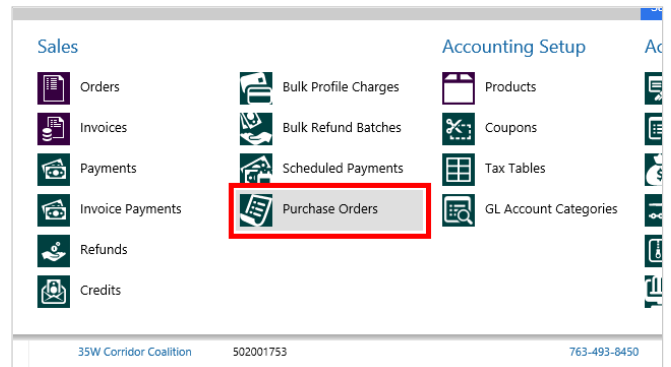
Memberships Courses Products

Committees Classes Orders

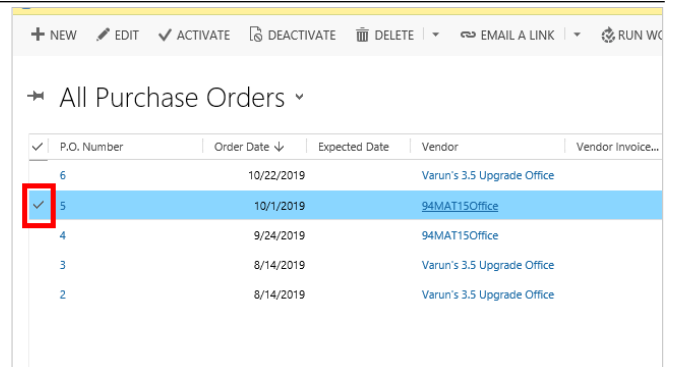


RAMCO Portal

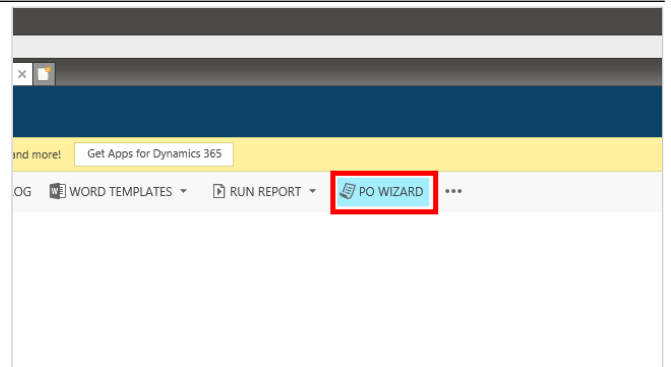
Click on the "Purchase Orders" entity.



Select and open the desired purchase order to work on



Click on the item **PO Wizard**



Enter the number of each item received

Purchase Order Wizard

Manage and submit your purchase order items.

Product	Quantity Expected	Previously Received	Newly Received	# to Write
Store Product 001	1	0	<input type="text" value="1"/>	<input type="text" value="0"/>
Store Product 744	5	0	<input type="text" value="0"/>	<input type="text" value="0"/>



RAMCO Portal

Select the receiving user

Product	744				
---------	-----	--	--	--	--

Total Amount of PO Received: Date Received: January

Cutlip, Mike
Fox, Thom
Lopez, Reggie
McCormick, Donna
Shehata, John

Cancel Submit

Click on submit

Total Amount of PO Received: \$0.00 Date Received: January

Receiving User:
Lopez, Reggie

Cancel Submit

You may click close when the process has completed

Product	744				
---------	-----	--	--	--	--

Total Amount: \$100.00 Date Received: 1/3/2020

Receiving User:
Lopez, Reggie

Close

2.4.4. Multiple Product Pickup Locations During Store Sales

Open the Navigation Area

Meetings Active Meetings - Micro

ramcosandbox.ramcoams.org/main.aspx#366640923

RAMCO Events Meetings

+ NEW DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES

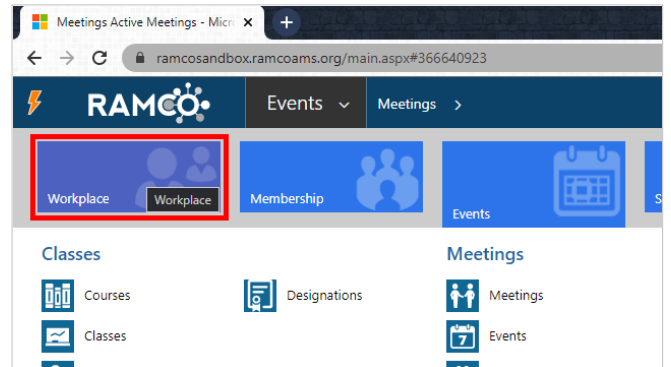
Active Meetings

✓	Name	Begin Date	End Date	Maximum Registratio...	Current Reg
	Test Committee - Decemeber	12/1/2020 12:00...	3/31/2020 8:00 ...		3
	Test Committee - Novemeber	11/11/2020 12:0...	3/31/2020 8:00 ...		3
	Test Committee - October	10/10/2020 12:0...	3/31/2020 8:00 ...		3

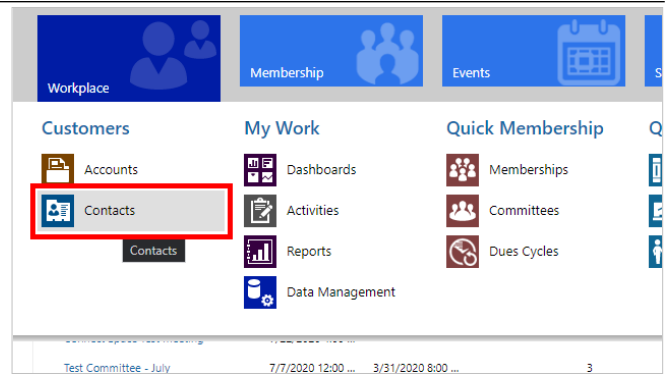


RAMCO Portal

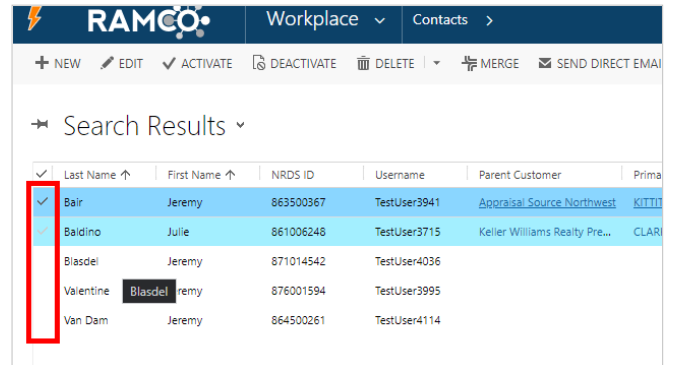
Click on the navigation area **Workplace**



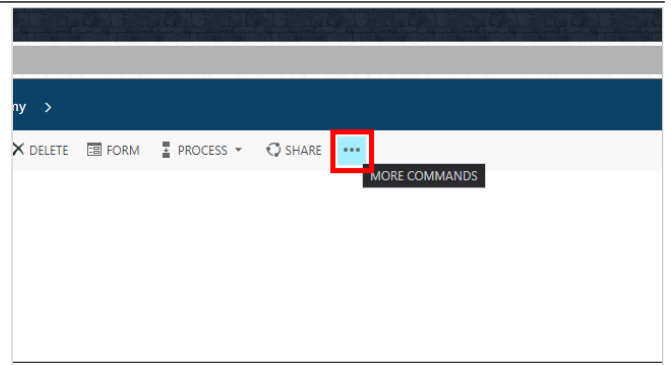
Click on the Contacts entity



Open a contact



Click on the command button **MORE COMMANDS**





RAMCO Portal

Click on the command button **Store**

A screenshot of the RAMCO CRM Help menu. The menu is open, showing various options. The 'Store' option, represented by a shopping cart icon, is highlighted with a red rectangular box. Other visible options include 'Run Report', 'RAMCO CRM Help', 'Impersonate', 'Deactivation Wizard', 'Process Payment', 'Membership Application', 'Meeting Registration', 'Class Registration', 'Payment Profile', 'NRDS Sync', and 'Password Reset'.

Add desired items to your cart

A screenshot of the RAMCO Portal 'Add to Cart' interface. The interface shows a table with columns for 'Name / Code [optional]', 'Price', and 'QTY'. The first row is for 'Dave's Test Product' with a price of \$1.00. The 'Add to Cart' button is highlighted with a red rectangular box. The second row is for 'Key Container' with a price of \$9.30.

Click the "Add to Cart" button

A screenshot of the RAMCO Portal 'Add to Cart' interface. The interface shows a table with columns for 'Name / Code [optional]', 'Price', and 'QTY'. The first row is for 'Dave's Test Product' with a price of \$1.00. The 'Add to Cart' button is highlighted with a red rectangular box. The second row is for 'Key Container' with a price of \$9.30.

Click on the button **View Cart**

A screenshot of the RAMCO Portal 'View Cart' interface. The interface shows a 'Shopping Cart' section with a list of items. The first item is 'Dave's Test Product' with a quantity of 1 and a price of \$1.00. The 'Subtotal' is \$1.00. The 'View Cart' button is highlighted with a red rectangular box.



RAMCO Portal

Click "Check Out" to progress

Continue Shopping Recalculate Check Out

Select your desired pickup location

Shipping
☒ In-Store Pick Up
☐ Ship to Address

Pickup Location
CMR Office
CMR 2nd Location (Test)

Back Cancel Continue

Click continue to progress

Shipping
☒ In-Store Pick Up
☐ Ship to Address

Pickup Location
CMR 2nd Location (Test)

Back Cancel Continue

2.4.5. Process a Store Sale

Click on the command button **MORE COMMANDS**

RM PROCESS SEND EMAIL MORE COMMANDS

Unapplied Cre... \$0.00 NRDS ID 276531005 Member ID 7294928 Primary Associ... KANSAS CITY



RAMCO Portal

Click on the command button **Store**

SOCIATION OF REALTORS® INC
TION OF REALTORS®

- Run Report
- Impersonate
- Deactivation Wizard
- Process Payment
- Membership Application
- Store**
- Meeting Registration
- Class Registration
- Payment Profile
- NRDS Sync

You may click the "Search" button first to retrieve all store products, or you can enter some criteria, then click "Search" to pull a filtered list.

Search

Select Category [optional]
All Categories

Search

You may only add 1 product to your cart at a time, but you can add any quantity of them.

Choose an item, then enter a number for the amount you wish to include in your cart.

If you have more to add, simply repeat this step.

Event Registration Fee (Holiday Party & Aposti Party	Price: \$70.00	QTY <input type="text"/> Add to Cart
Home Tips	Price: \$2.95	QTY <input type="text"/> Add to Cart
Metal Frame	Price: \$24.99	QTY <input type="text"/> Add to Cart

Once completed, click the "View Cart" button to view or edit your cart.

Code [optional]

Shopping Cart

101 Home Tips
10 x \$2.95

Subtotal: \$29.50

View Cart

Price
Price: \$70.00
QTY <input type="text"/> Add to Cart



RAMCO Portal

Click on the drop-down to select a tender type

A screenshot of a checkout interface. At the bottom, there are three buttons: "Continue Shopping", "Recalculate", and "Check Out". The "Check Out" button is highlighted with a red rectangular border.

Click on the button **Continue**

A screenshot of the "Payment Option" screen. It shows a dropdown menu with "Cash" selected. Below the dropdown are three buttons: "Back", "Cancel", and "Continue". The "Continue" button is highlighted with a red rectangular border.

If your organization has multiple store locations, you must select a pickup location so the inventory at that location is adjusted.

If you do not have multiple store locations you may proceed to the next step

A screenshot of the "Shipping" screen. It shows two radio buttons: "In-Store Pick Up" (selected) and "Ship to Address". Below this is a "Pickup Location" dropdown menu with "Default Pickup Location" selected. At the bottom are three buttons: "Back", "Cancel", and "Continue". The "Continue" button is highlighted with a red rectangular border.

Click on the button **Continue**

A screenshot of the "Shipping" screen, similar to the previous one. It shows the "In-Store Pick Up" radio button selected. The "Pickup Location" dropdown menu now shows "St. Joe" as the selected option. At the bottom are three buttons: "Back", "Cancel", and "Continue". The "Continue" button is highlighted with a red rectangular border.



RAMCO Portal

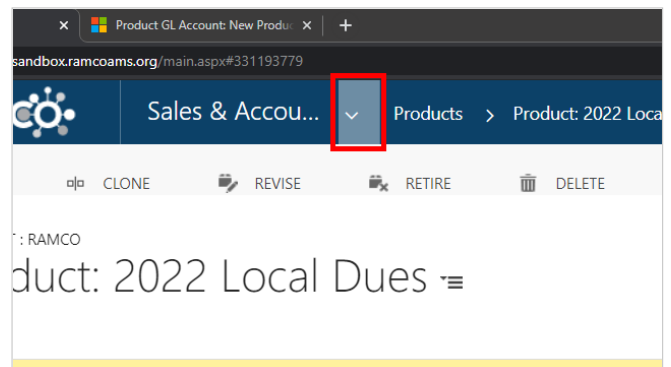
Once your payment details are entered, click continue to move on to the next step.

Click on the button **Submit Order & Payment**

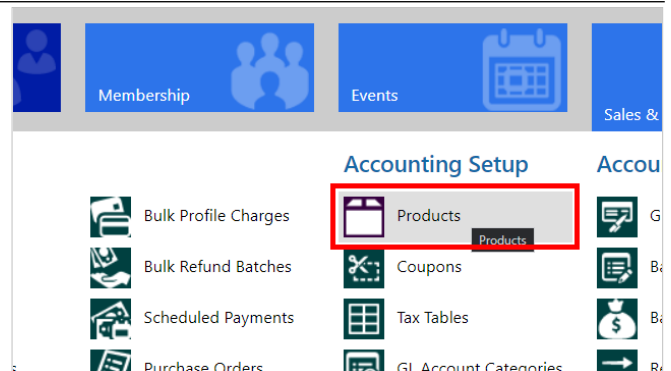
Please restart this assist from a contact record.

2.4.6. Publish a Product to the Store (Portal or Internally)

Open the Navigation Areas



Choose the Products entity





RAMCO Portal

Open the product in question

ramcosandbox.ramcoams.org/main.aspx#714322878

RAMCO Sales & Account... Products

ADD FAMILY ADD PRODUCT ADD BUNDLE

All Products, Families & Bundles

Name	Product ID	List Price
2020 Local Dues	2020 Local Dues	
2020 National Dues	2020 National Dues	

To enable the product to your portal store, this is the store members can access and buy items without staff assistance, toggle this field to "Yes"

Current Cost \$0.00
Average Cost \$0.00
Total Cost of Inventory --

PRODUCT VISIBILITY

Publish To Online Store **No**
Publish to POS Store Yes

On 6/19/2020 2:27 PM Status
By SYSTEM Status Reason

To enable the product to your RAMCO store, this is the store only staff members can access and process transactions for members, toggle this field to "Yes"

Average Cost \$0.00
Total Cost of Inventory --

PRODUCT VISIBILITY

Publish To Online Store Yes
Publish to POS Store **Yes**

On 6/19/2020 2:27 PM Status
By SYSTEM Status Reason

Click Save to complete

PAYMENT SETTINGS

Default Price List Non-Member
Payment Application Priority 1,038
Credit Application Priority --

Status Active
Status Reason Active

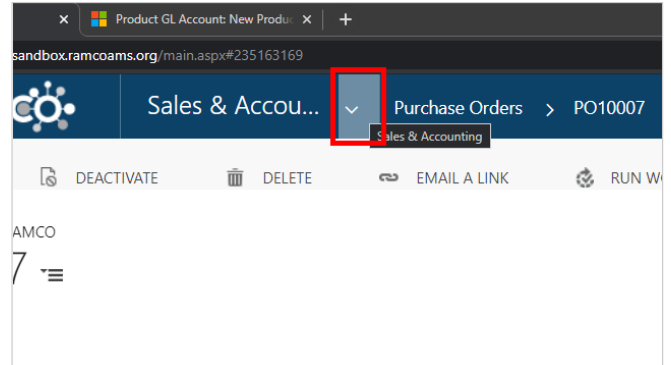
unsaved changes **Save**



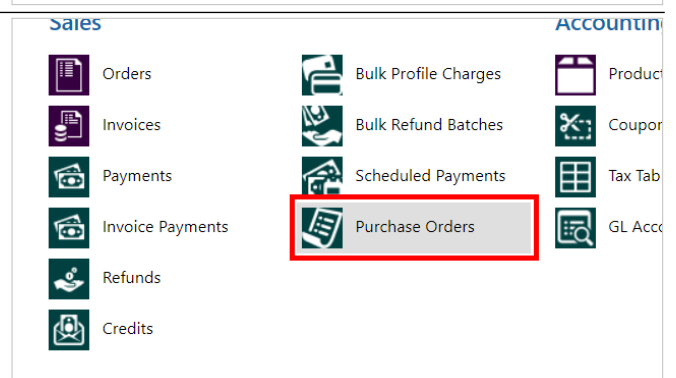
RAMCO Portal

2.4.7. Receive Purchase Order Inventory

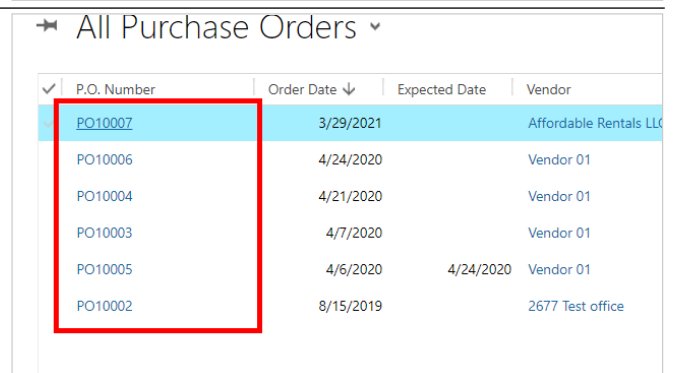
Open the Navigation Areas



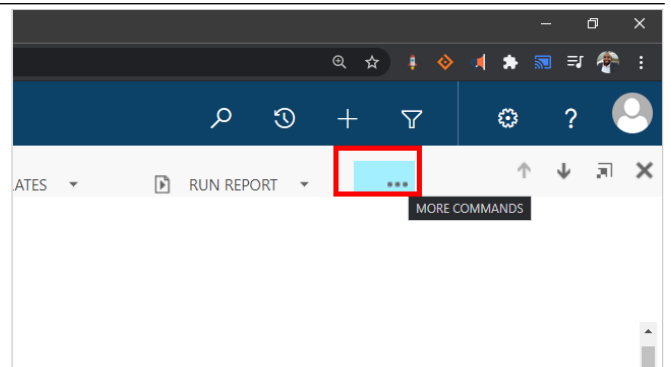
Choose the entity "Purchase Orders"



Open the Purchase Order you wish to receive inventory for



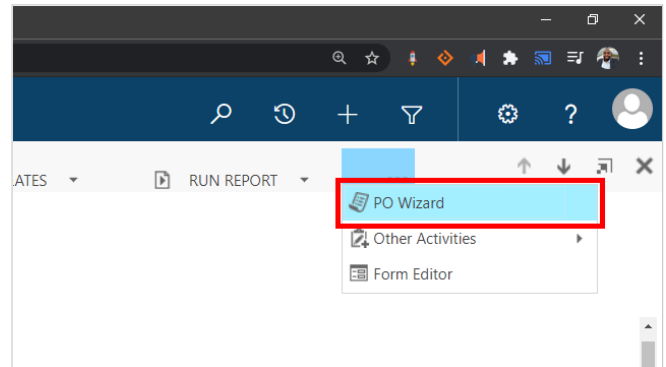
Click on the command button **MORE COMMANDS**





RAMCO Portal

Click on the command button **PO Wizard**



Enter the number of inventory received for each product in your Purchase Order

Purchase Order Wizard

Manage and submit your purchase order items.

Product	Quantity Expected	Previously Received	Newly Received	# to Write Off
10 Pack (10% Off)	100	0	<input type="text" value="0"/>	<input type="text" value="0"/>

Total Amount of PO Received: \$0.00

Date Received: March

Select your user account from the drop-down

Total Amount of PO Received: \$0.00

Receiving User:

If you need to adjust the unit cost check this box.

Write Off	Quantity Backordered	Unit Cost
<input type="checkbox"/>	<input type="text" value="010"/>	<input type="checkbox"/> \$0.00

Date Received: March 29, 2021



RAMCO Portal

Enter the cost per unit. If you do not have the per item cost, simply divide the cost of the group of items, by the number of items received.

Write Off	Quantity Backordered	Unit Cost
<input type="text"/>	<input type="text" value="010"/>	<input type="text" value="\$0.00"/>

Received:

Click on the button **Submit**

Total Amount of PO Received:
\$0.00

Receiving User:
Lopez, Reggie

Click on the button **Close**

(10% Off)

Total Amount:
\$80.00

Receiving User:
Lopez, Reggie

2.4.8. Return Inventory to Specific Store Location

Click on the command button **MORE COMMANDS**

WORD TEMPLATES ▾ ▶ RUN REPORT ▾ ...

Contact*
Cutlip-R35-01, MI : \$9



RAMCO Portal

Click on the command button **Payment Wizard**

The screenshot shows the RAMCO Portal interface. At the top, there are navigation links: "/ORD TEMPLATES", "RUN REPORT", and a menu icon. The menu is open, showing options: "Bulk Payment Application", "RAMCO CRM Help", "Payment Wizard" (highlighted with a red box), and "Form Editor". Below the menu, there are some financial details: "\$9.00" and "\$0.00".

Choose the appropriate refund or unapply payment action.

The screenshot shows the "Payment Wizard" dialog box. On the left, there is a list of items: "Cutlip-R35-01, Mike", "Cash", "\$9.00", and "EC". On the right, there is a section titled "What would you like to do with this payment?". There are four radio button options: "I want to refund the entire amount" (selected and highlighted with a red box), "I want to unapply some of this payment.", "I want to unapply some of this payment and refund the remainder.", and "I want to unapply some or all of the amount applied to this invoice and cancel this payment.".

Click on the button **Continue**

The screenshot shows the "Payment Wizard" dialog box. At the bottom, there are two buttons: "Close" and "Continue" (highlighted with a red box).

Click on the Return Inventory drop down field to view store locations.

The screenshot shows the "Return Inventory" dialog box. At the top, there is a message: "The payment will be unapplied from the selected invoice. Please choose whether or not you want to cancel the invoice." Below this, there is a table with columns: "Cancel Invoice", "Return Inventory", "Invoice #", and "Date". The "Return Inventory" column has a dropdown menu with "No" selected and highlighted with a red box. The "Invoice #" column shows "INV-01030-". The "Date" column shows "4/24/2021". Below the table, there is a section titled "How would you like to refund the payment?" with a radio button option "Issue a Check Refund".



RAMCO Portal

Select the store location where inventory should be returned.

The payment will be unapplied from the selected invoice. Choose whether or not you want to cancel the invoice.

<input type="checkbox"/>	Cancel Invoice	Return Inventory	Invoice #	Date
<input checked="" type="checkbox"/>	Yes	No	INV-01030-	4/24/2

How would you like to refund the payment?

☐ Issue a Check Refund

☐ Refund in Cash

Alternate Store Location
Default Store Location

Select the appropriate refund type (If Applicable).

How would you like to refund the payment?

☐ Issue a Check Refund

☒ Refund in Cash

Cancel any Contributions that may exist for the Invoice.

☐

Make refund to alternate Association or Account.

☐

Make refund to alternate Ass

Click continue to view summary page.

Cancel any Contributions that may exist for the Invoice.

☐

Make refund to alternate Association or Account.

☐

Back Close Continue

Click submit to process payment action and return items to inventory.

Refunded	\$0.00
Unapplied	\$0.00
Status	Inactive

Back Close Submit



RAMCO Portal

Click on the button **Close**

--
Cutlip-R35-01, Mike
Cash
\$9.00
--
--
--
--
--
BC --

Date	Method	Card
4/24/2020	Cash	

Close

Print Receipt

Perform

Please restart this assist from a payment record

3. Membership

3.1. Membership (Basics)

3.1.1. Add Contact to a Committee

Open the "View Related" tab on the contact's record.

The screenshot shows the Ramco Remmy application interface. The top navigation bar includes 'Workplace' and 'Contacts' tabs. The 'Contacts' tab is active, showing a list of contacts. A red box highlights the 'Ramco, Remmy' contact entry. Below the contact list, there are action buttons: 'MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'PROCESS', and 'SHARE'. The 'DELETE' button is highlighted with a red box.

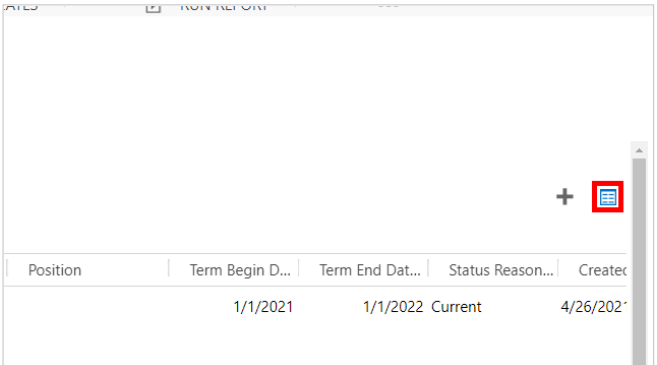
Click on the "Committee Memberships" entity.

The screenshot shows the REALTOR.com dashboard with a sidebar on the left containing navigation links. The 'Committee Members...' link is highlighted with a red rectangular box. Below the sidebar, the main content area displays a table with columns for 'Member Type', 'Member Status', 'Primary Association', 'Primary State Association', 'Office', and 'Designated REALTOR®'. The table contains one row of data for a member named 'Jill'.



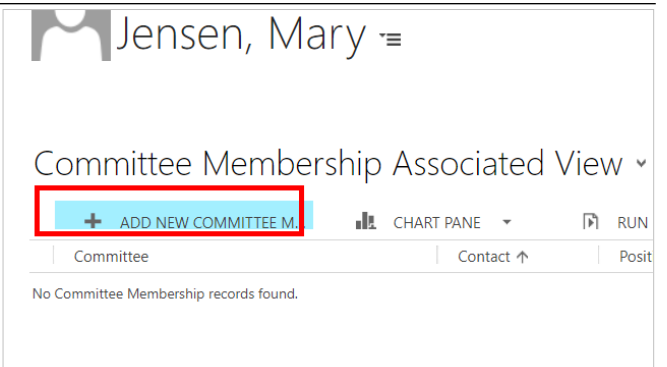
RAMCO Portal

Click on the Waffle to Expand the view of Committee Memberships



Position	Term Begin D...	Term End Dat...	Status Reason...	Created
	1/1/2021	1/1/2022	Current	4/26/2021

Click on the command button **Add New Committee Membership**



Jensen, Mary

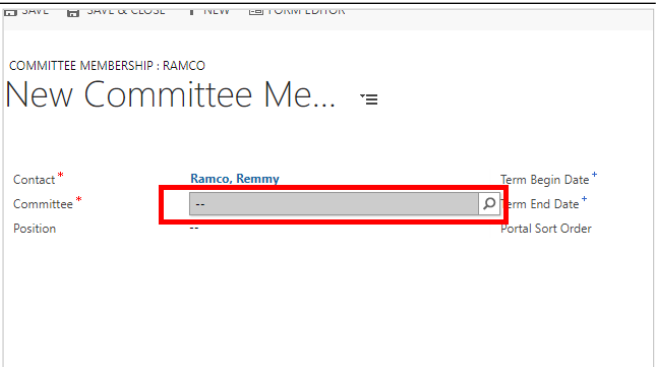
Committee Membership Associated View

+ ADD NEW COMMITTEE M... CHART PANE RUN

Committee Contact Posit

No Committee Membership records found.

Search for the committee



COMMITTEE MEMBERSHIP : RAMCO

New Committee Me...

Contact * Ramco, Remmy

Committee * --

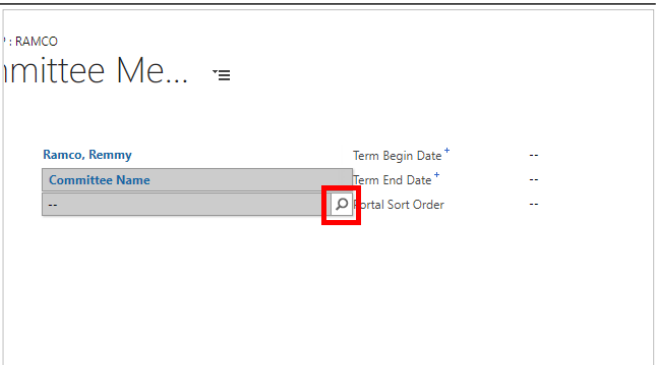
Position --

Term Begin Date * --

Term End Date * --

Portal Sort Order --

Set the position



COMMITTEE MEMBERSHIP : RAMCO

Committee Me...

Ramco, Remmy

Committee Name

Term Begin Date * --

Term End Date * --

Portal Sort Order --



RAMCO Portal

Select the appropriate position for this committee member.

COMMITTEE MEMBERSHIP : RAMCO

New Committee Me...

Contact* Ramco, Remmy
Committee*
Position

Chair Active 9/11/2019 10:54 AM
Member Active 9/11/2019 10:55 AM
Vice-Chair Active 9/11/2019 10:55 AM

[Look Up More Records](#)

3 results + New

Set a Term Begin Date.

RAMCO will automatically move this member from pending to current on the date listed here.

Term Begin Date*
Term End Date*
Portal Sort Order

Set the Term End Date.

RAMCO will automatically expire this committee membership on the date listed here.

Term Begin Date* 1/1/2020
Term End Date*
Portal Sort Order

Click Save & Close to complete the process.

Workplace Contacts

RAMCO

SAVE SAVE & CLOSE + NEW FORM EDITOR

Save and close this Committee Membership.

COMMITTEE ME

New Committee Me...

Contact* Ramco, Remmy
Committee*

Please restart this assist from a contact record.

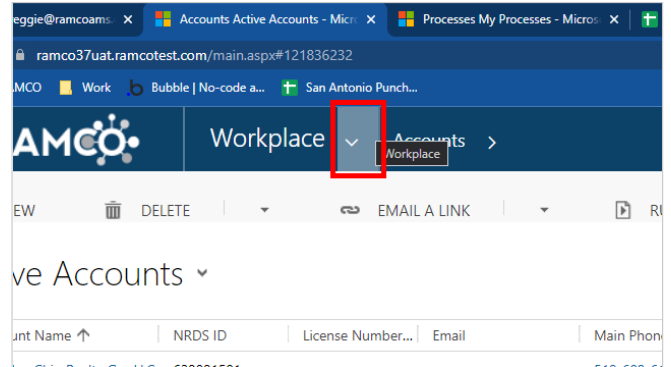


RAMCO Portal

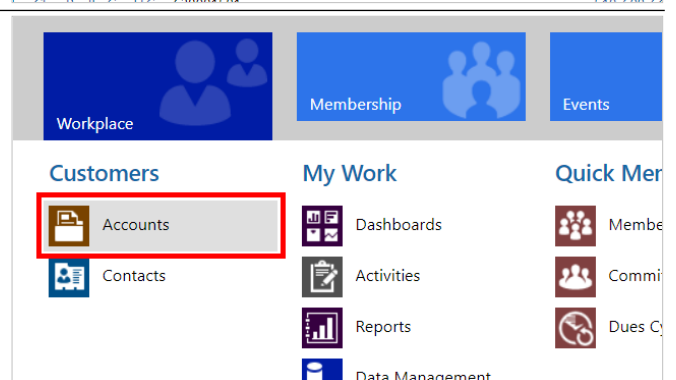
3.1.2. Add New Office in NRDS for an Existing Member

The new member app wizard lets you add an office while adding a member. Sometimes, the broker is already a member, so you cannot use the app wizard for them again. Instead, we must add the office without going through the app wizard.

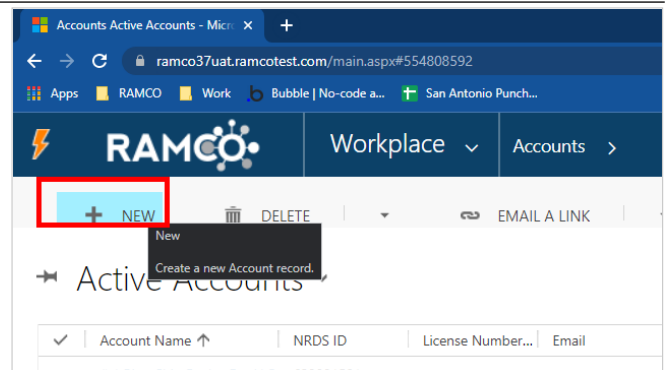
To begin, Open the Navigation Areas.



From the workplace area, choose "Accounts"



Click on the command button **New**



Enter the Office name

Summary

ACCOUNT INFORMATION

Account Name *	<input type="text"/>
Primary Contact	--
Secondary Contact	--
Manager Designee	--
Account ID	--



RAMCO Portal

Add the Broker or Principal to the Primary Contact field

SUMMARY

ACCOUNT INFORMATION

Account Name *	Keller Williams South
Primary Contact	--
Secondary Contact	--
Broker Designee	--
Agent Account	--
MS ID	--
License Number	--

Add an email for the office

EMAIL AND WEBSITE

Email	--	Office
Email Address 2	--	S
Email Address 3	--	To enable
Website	--	

1. Enter Street address
2. Enter the city name
3. Choose the state
4. Enter the zip code

123 Elm Street

--

Oz

Kansas

--

United Select to enter data

Click save to complete the account record.

Similar to Contacts, Accounts require memberships as well. Without an office membership, no one will be able to join your board with that office.

Next we will add an office membership.

Inbox (129) - reggie@ramcoam... Account: New Account Processes My Process...

ramco37uat.ramcotest.com/main.aspx#111454850

Apps RAMCO Work Bubble | No-code a... San Antonio Punch...

RAMCO Workplace Accounts > New

SAVE SAVE & CLOSE + NEW FORM

ACCOUNT : RAMCO

New Account



RAMCO Portal

Click on the link **Add Office Membership record**.

NRDS ID
--

Office Memberships +

Status Reason...	Primary ...	Association	State Associati
No Office Membership records found.			

Enter the local association

South NEW OFFICE MEMBER...

Office * Keller Williams South NM S

Primary Association No NRD

Association * -- statu

State Association * --

MLS INFORMATION

MLS ID -- Last

Click on the lookup **Association**

South NEW OFFICE MEMBER...

Office * Keller Williams South NM S

Primary Association No NRD

Association * st cloud statu

State Association * --

MLS INFORMATION

MLS ID -- Last

Enter the state association

South NEW OFFICE MEMBER...

Office * Keller Williams South NM S

Primary Association No NRD

Association * ST CLOUD AREA ASSOCIATION OF Statu

State Association * --

MLS INFORMATION

MLS ID -- Last

MLS Status --



RAMCO Portal

Enter the number of Non-member Salespersons in this office. This is usually 0 to begin with.

er... ☰

uth NM Salesperson Count * -- Select to enter data

NRDS Timestamp

ASSOCIATION OF REALTORS® Status Reason

OCIATION OF REALTORS®

Active

Click save to complete the membership.

Next we will need to submit this brand new office to M1.

To do so, we must submit a workflow.

coams x Account: Keller Williams South x Processes My Processes - Micro x San Antonio

37uat.ramcotest.com/main.aspx#111454850 Office Membership: New Office Membership - Google Chrome

Work Bubble | No-code a... San Antonio ramco37uat.ramcotest.com/main.aspx?etc=101938

Workplace RAMCO Me

CONNECT SAVE SAVE & CLOSE

Save

OFFICE MEMBERSHIP Save this Office Membership.

er Williams South New Office Mem

Click on the command button **Run Workflow**

Search List - Google x +

CIATION OF REALTORS® - Google Chrome

qs=%3f_CreateFromId%3d%257bA3AD9E85-6430-EC11-9C6F-00155D630F03%257d%26_Cr...

ership Office Memberships Keller Williams Sout...

DELETE EMAIL A LINK RUN WORKFLOW

th... ☰

Check the "Generate NRDS ID" workflow

ms South nmy

Office * Primary Association * Association * State Association

MLS INFORMATION

MLS ID

MLS Status

Look for Process

Look in On Demand Workflows

Search Search for records

Process Name Cate

Generate NRDS ID Work



RAMCO Portal

Click add.

1 - 1 of 1 (1 selected) Page 1

Add Cancel Remove Value

10/18/2021 6:42	Modified On	10/18/2021 6:42	Status
Lopez, Reggie	Modified By	Lopez, Reggie	Status Reason

Click ok to complete the process.

This office has now been added to M1 with a new NRDS ID.

You can now process an application and choose this office during the process.

Look for: Process Show Only

Look in: On Demand Workflows

Confirm Application of Workflow

This workflow will be applied to 1 Office Membership.

You can monitor workflow jobs by opening each Office Membership and

Are you sure that you want to continue?

3.1.3. Create New Office for Existing Broker

Click on the navigation button **Events**

RAPB: Tags - reggie@ramcoams.com x Sent Mail - lopezrme@gmail.com x Sign In

ramcosandbox.ramcoams.org/main.aspx#444766846

RAMCO Events Meetings > RAMCON Meeting T...

NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG

MEETING REGISTRATION FEE : RAMCO

RAMCON Meeting Test

Name * RAMCON Meeting Test

Meeting * 2020 RAMCON Meetings Test

Click on the navigation area **Workplace**

RAPB: Tags - reggie@ramcoams.com x Sent Mail - lopezrme@gmail.com x Sign In

ramcosandbox.ramcoams.org/main.aspx#444766846

RAMCO Events Meetings > RAMCON Meeting T...

Workplace Membership Events

Classes

- Courses
- Classes

Designations

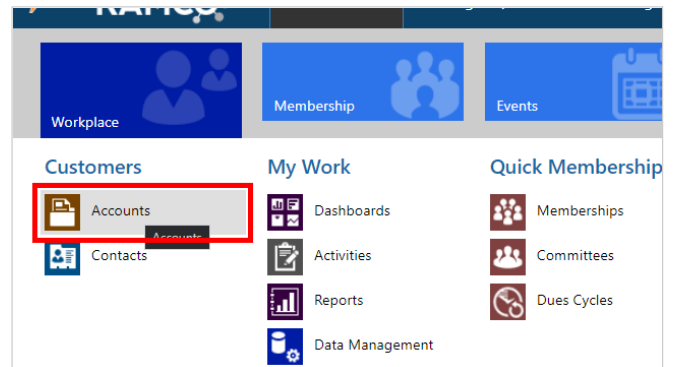
Meetings

- Meetings
- Events



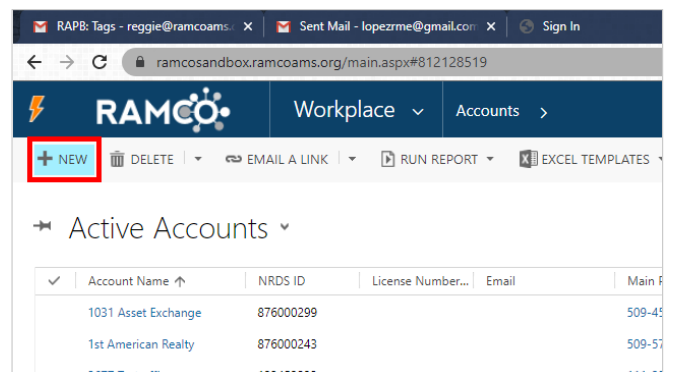
RAMCO Portal

Click on the link **Accounts**



3.1.3.1. Create new Account (Office) record

Click on the command button **New**



1. Enter the office name
2. Set the broker as the "Primary Contact"
3. Enter the office license number (if applicable)
4. select a relationship type
5. Enter the office email address
6. Enter the office website
7. Enter the office email
8. Enter the office phone number

- Enter the street address



RAMCO Portal

Select a branch type

DETAILS

COMPANY PROFILE

Business Name --

Corporate Name --

Formal Name --

Branch Type **Main**

Office Type **Single**

Billing Office **Main**

Select an office type

DETAILS

COMPANY PROFILE

Business Name --

Corporate Name --

Formal Name --

Branch Type **Main**

Office Type --

Billing Office --

Select to enter data

Click on the command button **Save**

RAPB: Tags - reggie@ramcoams.org x Sent Mail - lopezme@gmail.com x Sign In

ramcosandbox.ramcoams.org/main.aspx#189227932

RAMCO Workplace Accounts > New Account

SAVE SAVE & CLOSE + NEW FORM RAMCO CRM HELP

Save

Save this Account. RAMCO

New Account

SUMMARY

3.1.3.2. Add new Office Membership record

Click on the link **Add Office Membership record**.

NRDS ID -- Owner Last name, F

Office Memberships

Status Reason... Primary ... Association Add Office Membership record.

No Office Membership records found.



RAMCO Portal

Click in the association field and search for your association

New Office Member...

Office * **New Office Name**

Primary Association **No**

Association *

State Association *

MLS INFORMATION

MLS ID --

MLS Status --

Choose your association from the list

NEW OFFICE MEMBER...

Office * **New Office Name**

Primary Association **No**

Association *

State Association *

MLS INFORMATION

MLS ID --

MLS Status --

Click in the state association field and search for your association

NEW OFFICE MEMBER...

Office * **New Office Name**

Primary Association **No**

Association *

State Association *

MLS INFORMATION

MLS ID --

MLS Status --

Choose your association from the list

NEW OFFICE MEMBER...

Office * **New Office Name**

Primary Association **No**

Association *

State Association *

MLS INFORMATION

MLS ID --

MLS Status --



RAMCO Portal

Enter the number of non-member salespersons in this office

... ☰

NM Salesperson Count *

NRDS Timestamp

Association of Realtors® Status Reason

Active

Select to enter data

Click on the command button **Save**

Workplace

RAMCO

Office Name

SAVE

SAVE & CLOSE

NEW

Save this Office Membership.

OFFICE MEMBERSHIP - RAMCO

New Office Member

3.1.3.3. Run the "Generate NRDS ID" workflow

Click on the command button **Run Workflow**

Teams Local Business Teams - M...

Account: New Office Name

Membership: New Office Name - ST PAUL AREA ASSOCIATION OF REALTORS® INC - Google Chrome

ramcosandbox.ramcoams.org/main.aspx?etc=10193&extraqs=%3f_CreateFromId%3d%257b6C124D14-E6C2-EA...

RAMCO

Membership

Office Memberships

New Office N...

DEACTIVATE

DELETE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

WOR...

MEMBERSHIP : RAMCO

Office Name - ...

Run Workflow

Run a workflow for this Office Membership.

View the status of workflows in the Workflow ta...

Make sure the workflow "Generate NRDS ID" is checked.

Office *

Primary Association

Association *

State Association *

MLS INFORMATION

MLS ID

MLS Status

Look for

Look in

Search

Process Name

Category

Generate NRDS ID

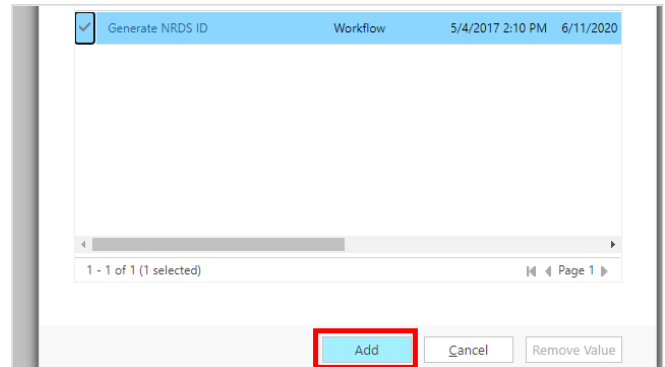
Workflow

Generate NRDS ID

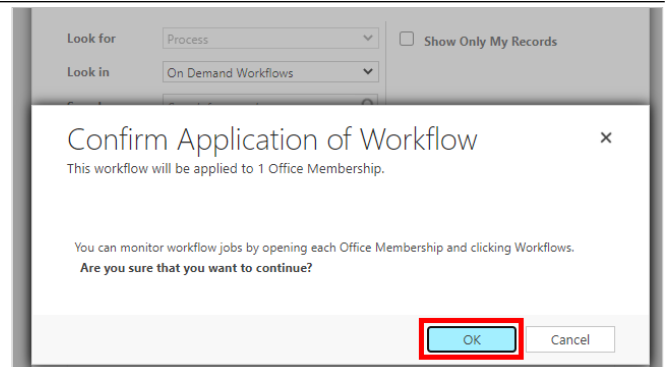


RAMCO Portal

Click on the button **Add**

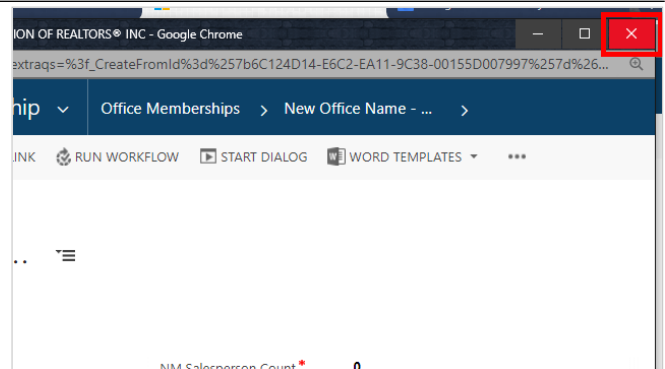


Click on the button **OK**



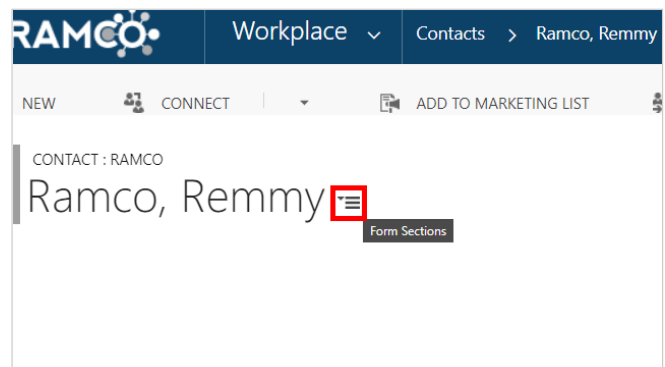
Click to close the office membership record.

To see the newly generated nrds id, you may refresh the page or press F5 on a windows pc.



3.1.4. Deactivate a Membership

Click on the link **Form Sections**





RAMCO Portal

Click on the link **MEMBERSHIPS**

CONTACT : RAMCO

Ramco, Remmy

- AT A GLANCE
- SUMMARY
- MEMBERSHIPS**
- MEMBERSHIPS
- CLASSES AND MEETINGS
- ACCOUNTING
- ADDRESSES
- DEMOGRAPHICS AND MARKETING

Balance

Funds

AREA ASSOCIATION OF REALTORS

ndary | Pending

AREA ASSOCIATION OF REALTORS

ndary | Active

TAMPA ASSOCIATION OF REALTORS® INC

Check the membership you wish to deactivate.

MEMBERSHIPS

Membership Sub-Grid

Search for records

Primary ...	Contact ↑	NRDS ID	Member Type...	Membe
do	Ramco, Remmy	505510506	MLS	
do	Ramco, Remmy	505510506	MLS	
do	Ramco, Remmy	505510506	MLS	
<input checked="" type="checkbox"/>	Ramco, Remmy	505510506	Supra	

Click on the command button **Deactivate**

RAMCO Workplace Memberships

+ NEW **DEACTIVATE** DELETE ASSIGN

MEMBERSHIP : RAMCO

Ramco, Remmy

SUMMARY

Name Ramco, Remmy - MLS

Contact Ramco, Remmy

Deactivate

Deactivate these Memberships.

You can reactivate these Memberships from the Inactive Mem

User your mouse to scroll up or down.

Choose a deactivation status from the list.

ACTIVITIES NOTES

Enter a note

Confirm Deactivation

Do you want to deactivate the selected 1 Membership? You can reactivate these Memberships from the Inactive Mem

This action will change the status of the selected Membership to Inactive

Status **Inactive**



RAMCO Portal

Click deactivate to confirm.

the status of the selected Membership to Inactive.

Terminated

Deactivate Cancel

Please restart this assist from a contact record.

3.1.5. Approve Committee Nomination

Select the Committee Nomination record to be approved.

Committee Nominations Sub-Grid (Commit...

Search for records

Status Reason...	Name ↑
Pending	Ramco, Remmy - Committee Nam...

Modified On 3/26/2020 1:36 PM

Click on the command button **Run Workflow**

Committee Nomination: Ramco, x

ramco35uatupgrade.ramcotest.com/main.aspx#845860700

RAMCO Workplace Committees > Ramco, Remmy - Co...

NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEXT

Run Workflow

Run a workflow for this Committee Nomination

View the status of workflows in the Workflow

Committee Nomination: RAMCO

Ramco, Remmy

Committee Name

Nomination Form Response

Select the "Approve Nomination" workflow

Enter your search criteria.

Look for Process

Look in On Demand Workflows

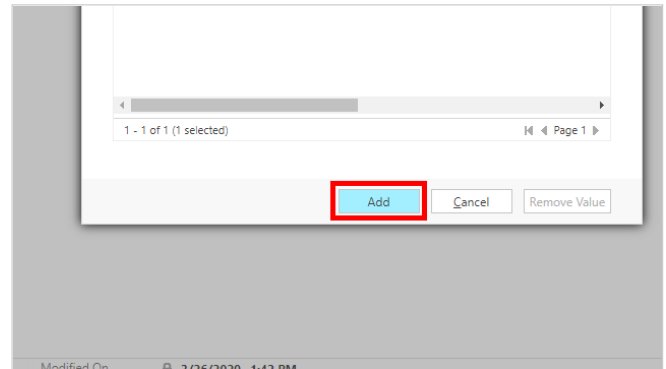
Search

Process Name	Category
Approve Nomination	Workflow

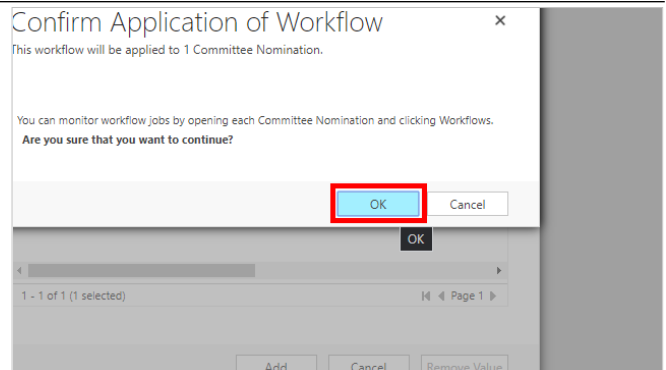


RAMCO Portal

Click on the button **Add**



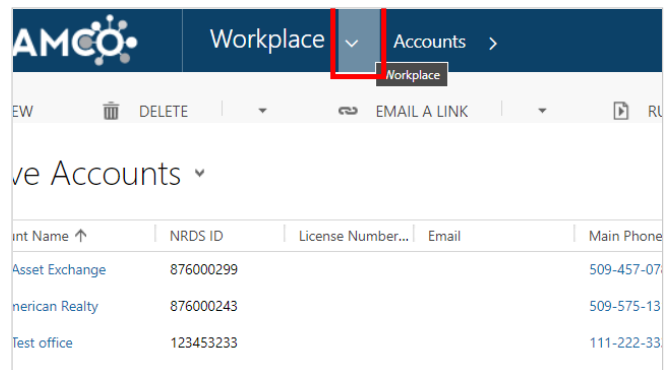
Click on the button **OK**



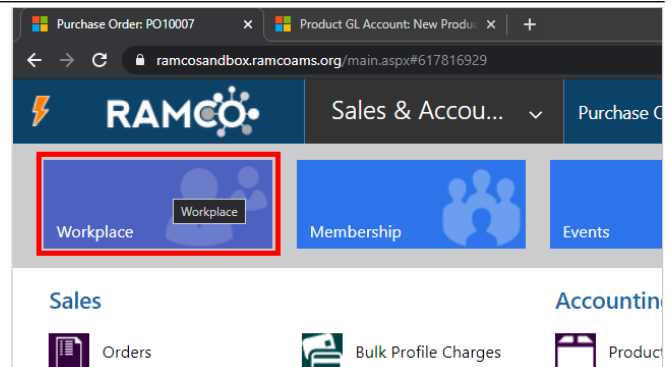
Please restart this assist from a committee record.

3.1.6. Merge Duplicate Account Records

Open the Navigation Areas



Choose the Workplace area

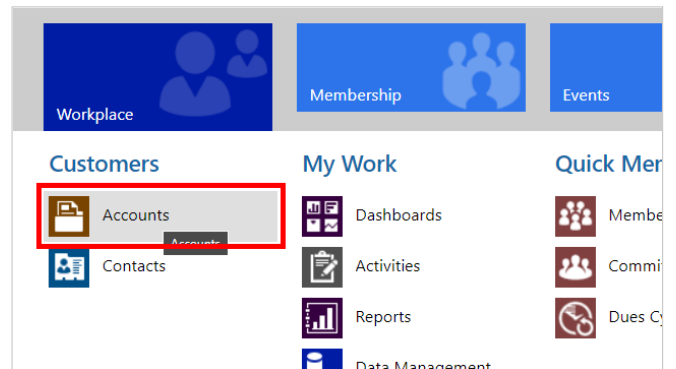




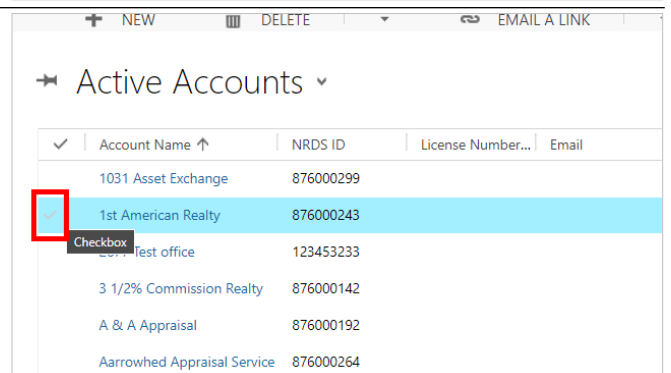
RAMCO Portal

Choose the Accounts entity, then search for your duplicate accounts.

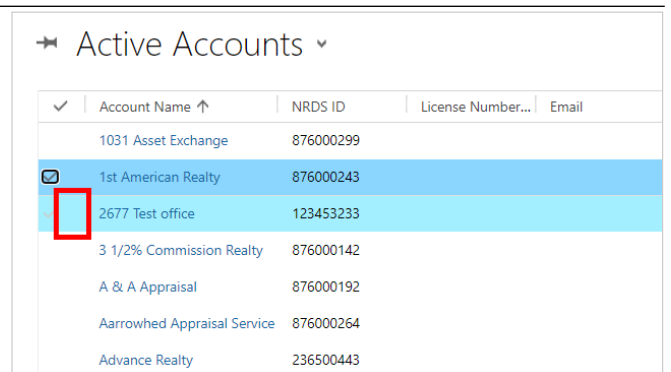
You must search so that they both show up in the list.



Choose the first account to be merged

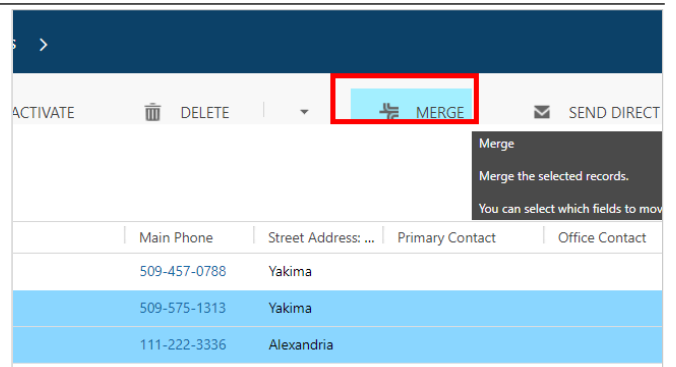


Choose the second account to be merged



Click the Merge button.

Merge is a special permission in RAMCO. If you do not have it, speak to your RAMCO administrator.





RAMCO Portal

Choose a account to be the master record. The other account will be merged into this one.

Select the fields to merge into the master record.

<input checked="" type="radio"/> 1st American Realty	<input type="radio"/> 2677 Test office
<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this record
<input type="radio"/> 876000243	<input type="radio"/> 123453233
<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
<input checked="" type="radio"/> 1st American Realty	<input type="radio"/> 2677 Test office

Use the radio buttons below to choose which field to keep when the contacts have different values.

AutoPay My Dues	<input type="radio"/>
Customer Size	<input type="radio"/> Default Value
BUSINESS DETAILS	<input type="radio"/> Select all fields in this section
Member Designated Realtor	<input type="radio"/> No
WEB PORTAL DETAILS	<input type="radio"/> Select all fields in this section
Username	<input checked="" type="radio"/> TestUser3974
Password	<input type="radio"/> 1000: SXSFmgnFytOJ2Vn5dkwZv025fY+dT75:hUP
Password Update Date	<input type="radio"/> 4/18/2020
Password Update Required	<input type="radio"/> No
Last Portal Login	<input type="radio"/>

Click OK to complete the merge.

<input checked="" type="radio"/> 6/19/2020 2:11 PM
<input checked="" type="radio"/> 6/19/2020 2:11 PM
<input checked="" type="radio"/> No
<input checked="" type="radio"/> Yes

☒ OK ☐ Cancel

Click OK to complete the merge

<input checked="" type="radio"/> Allow
<input checked="" type="radio"/> Allow

Records have data in the same field, the master record field is selected.

Record's child records. The subordinate record will be deactivated.

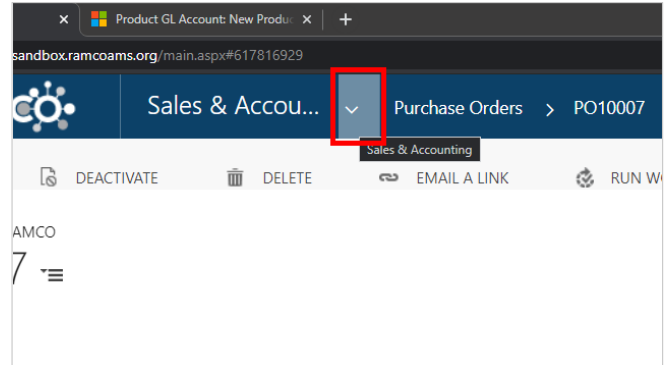
☒ OK ☐ Cancel



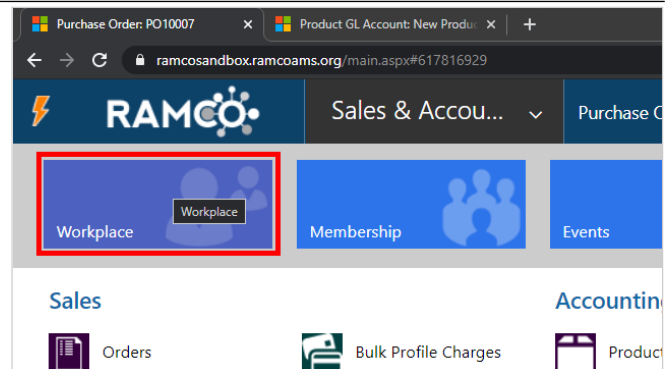
RAMCO Portal

3.1.7. Merge Duplicate Contact Records

Open the navigation areas

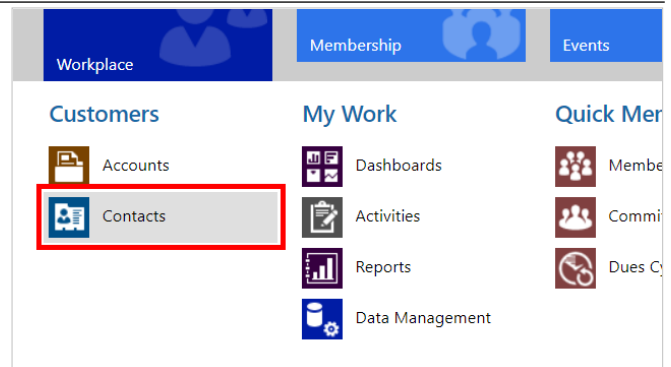


Choose the workplace area



Choose the Contacts entity, then search for your duplicate contacts.

You must search so that they both show up in the list.



Select the first contact to be merged

✓	Last Name ↑	First Name ↑	NRDS ID	Username	Parent Cust
	Adams	Dee	876000609	TestUser3816	Mike Cutlip
	Ahlbrecht	Richard	876000128	TestUser3750	Mike Cutlip
	Cutlip	Mike		TestUser3974	
	Cutlip	Mike		mikecutlip-sand...	
	Cutlip-R3-13	Mike	84001564		Mike Cutlip
	Cutlip-R35-01	Mike	506092155	mikecutlip-r35-01	Mike Cutlip
	Cutlip-Sandbox01	Mike	505510508	mikecutlip01	MikeC - Sa
	Cutlip-Sandbox03	Mike		mikecutlip03	



RAMCO Portal

Select the second contact to be merged.

Search Results ▾

✓	Last Name ↑	First Name ↑	NRDS ID	Username	Parent Cust
	Adams	Dee	876000609	TestUser3816	Mike Cutlip
	Ahlbrecht	Richard	876000128	TestUser3750	Mike Cutlip
<input checked="" type="checkbox"/>	Cutlip	Mike		TestUser3974	
<input checked="" type="checkbox"/>	Cutlip	Mike		mikecutlip-sand...	
	Cutlip-R3-13	Mike	84001564		Mike Cutlip
	Cutlip-R35-01	Mike	506092155	mikecutlip-r35-01	Mike Cutlip
	Cutlip-Sandbox01	Mike	505510508	mikecutlip01	MikeC - Sa

Click the Merge button.

Merge is a special permission in RAMCO. If you do not have it, speak to your RAMCO administrator.

ACTIVATE DELETE **MERGE** SEND DIRECT

Parent Customer	Primary Association	Email	Home Pho
Mike Cutlip Office-R263-03	ST PAUL AREA ASSOCIATI...	Dee.Adams@test.test	

Choose a contact to be the master record. The other contact will be merged into this one.

Select the fields to merge into the master record.

<input checked="" type="radio"/> Cutlip, Mike	<input type="radio"/> Cutlip, Mike
<input type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
<input checked="" type="radio"/> Mike	<input type="radio"/> Mike
<input checked="" type="radio"/> Cutlip	<input type="radio"/> Cutlip
<input type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section

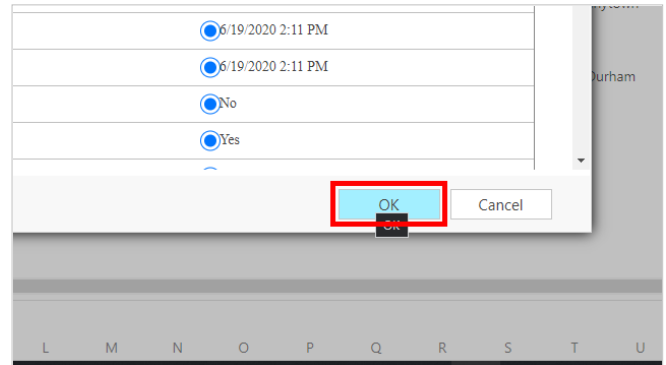
Use the radio buttons below to choose which field to keep when the contacts have different values.

AutoPay My Dues	<input type="radio"/>
Customer Size	<input type="radio"/> Default Value
BUSINESS DETAILS	<input type="radio"/> Select all fields in this section
Member Designated Realtor	<input type="radio"/> No
WEB PORTAL DETAILS	<input type="radio"/> Select all fields in this section
Username	<input checked="" type="radio"/> TestUser3974
Password	<input type="radio"/> 1000:XSFMnqnFytOJ2Vn5dkwZv025fY+dT75:hUP
Password Update Date	<input type="radio"/> 4/18/2020
Password Update Required	<input type="radio"/> No
Last Portal Login	<input type="radio"/>



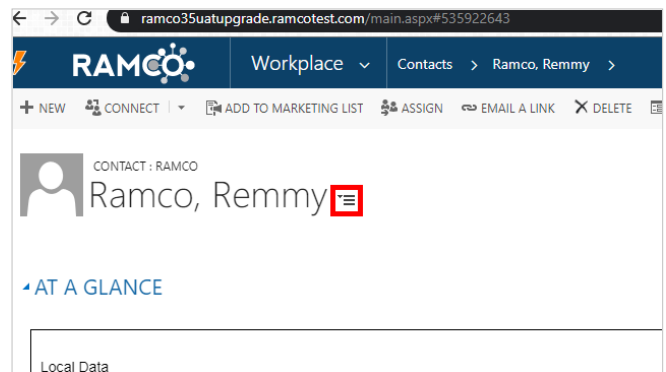
RAMCO Portal

Click OK to complete the merge.

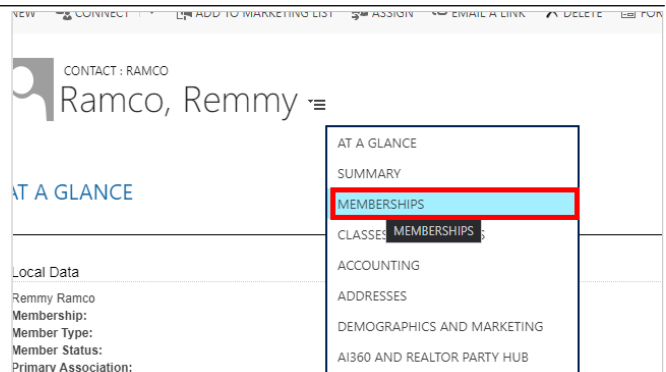


3.1.8. Perform an Office Transfer

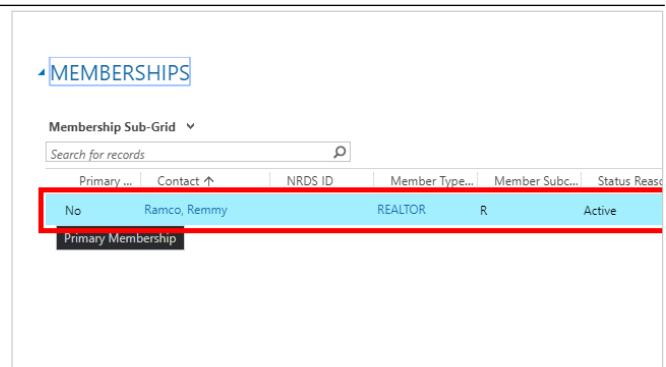
Click on the link **Form Sections**



Click on the link **MEMBERSHIPS**



Open the membership record to perform the office transfer.





RAMCO Portal

Click the waffle icon to expand the list of office transfers

Primary Membership | Member Type* | NRDS ID

No | REALTOR | --

All Office Transfers ▾

Status Reason...	New Office	Current Office	Date Approve...	Association St
No Office Transfer records found.				

Click on the command button **Add New Office Transfer**

MEMBERSHIP : RAMCO

Cutlip-R35-01, Mike - REALTOR

Office Transfer Associated View ▾

+ ADD NEW OFFICE TRANSF... | ADD EXISTING OFFICE TR... | BULK DELETE

Membership ↑ | Add New Office Transfer | New Office

Add a related Office Transfer to this record.

Click on the lookup **New Office**

OFFICE TRANSFER : RAMCO

New Office Transfer

Membership | Ramco, Remmy - REALTOR

Current Office* | Remmy's Realty

New Office* | --

Order | --

APPROVAL

Association Staff

Date Approved

Designated REALTOR

Click on the command button **Save**

ramco35uatupgrade.ramcotest.com/main.aspx#9558

Office Transfer: New Office Transfer - Google Chrome

ramco35uatupgrade.ramcotest.com/main.aspx?et

Workplace ▾ | Membership

RAMCO

New Office Transfer

SAVE | SAVE & CLOSE | NEW | FORM EDIT

Save

OFFIC Save this Office Transfer.

New Office Transfer

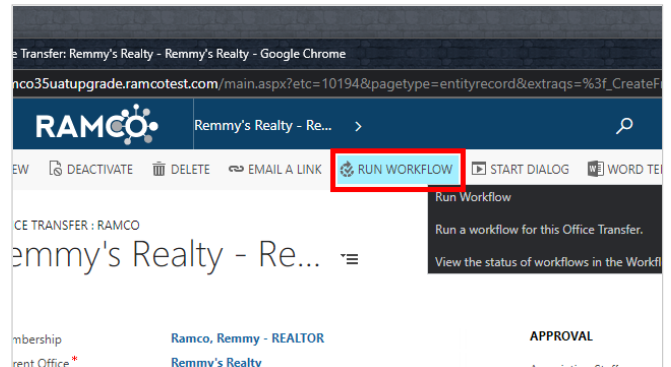
Membership | Ramco, Remmy - REALTOR

Current Office* | Remmy's Realty

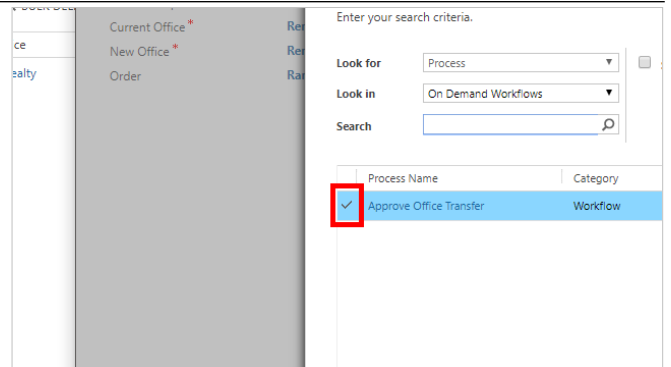


RAMCO Portal

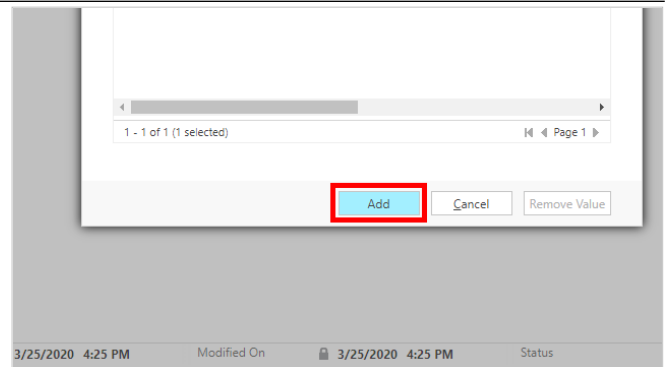
Click on the command button **Run Workflow**



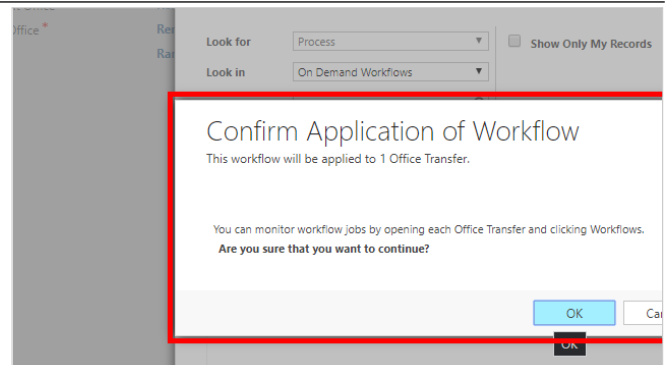
Select the "Approve Office Transfer" workflow



Click on the button **Add**



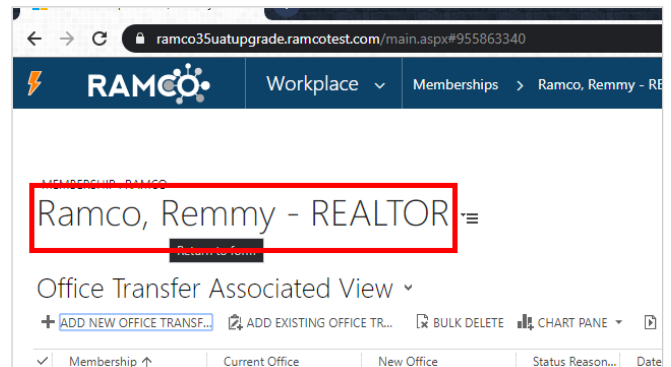
Then click OK to start workflow





RAMCO Portal

Click on the membership name to return to the membership record.

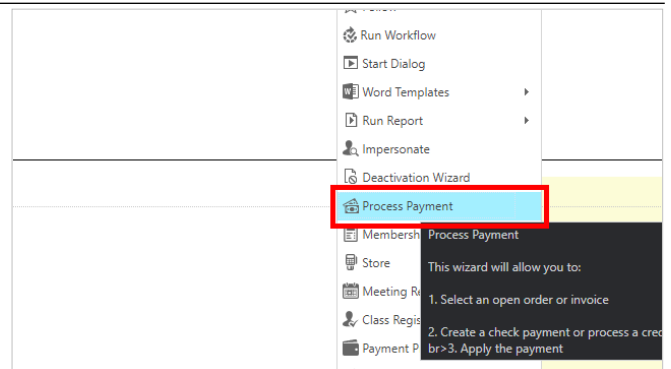


Click on the contact name to return to the contact record.



Open the process payment wizard to pay for the transfer.

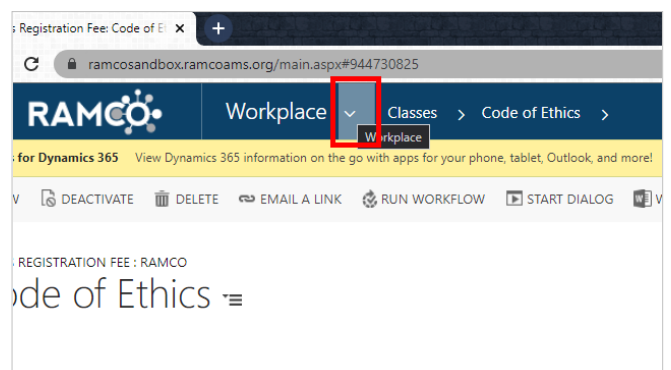
This is the end of the assist.



3.2. Membership (Advanced)

3.2.1. Add Question to Membership App Wizard

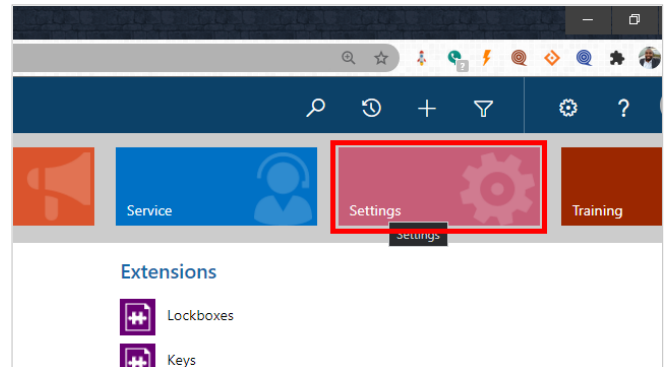
Open the Navigation Areas



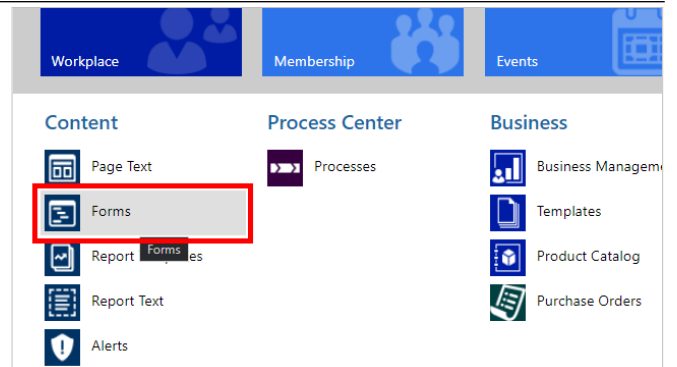


RAMCO Portal

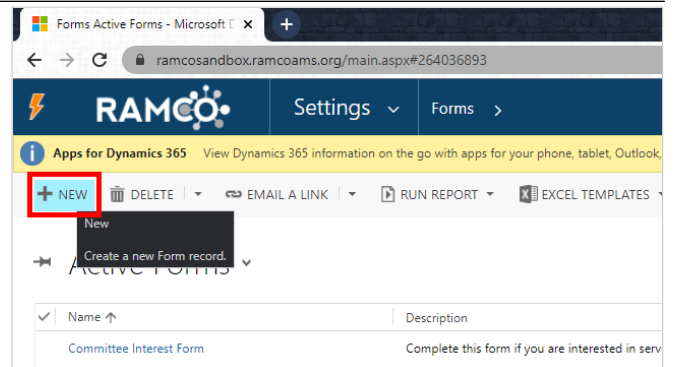
Click on the link **Settings**



Click on the link **Forms**



Click on the command button **New**

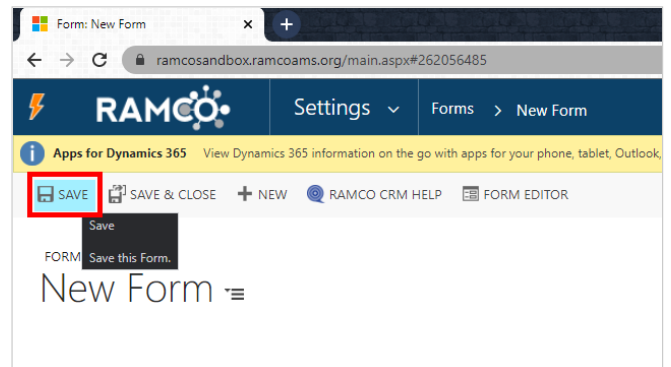


Give the Form a name

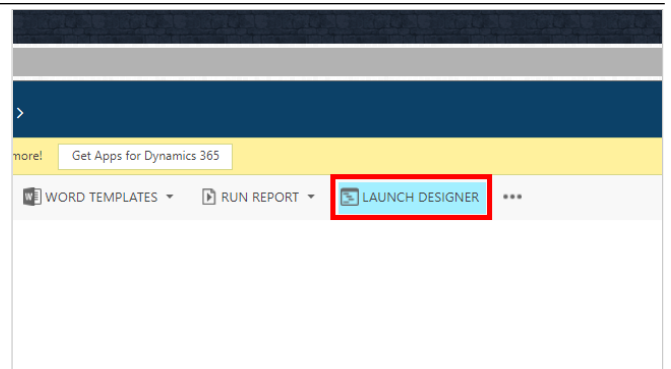


RAMCO Portal

Click on the command button **Save**

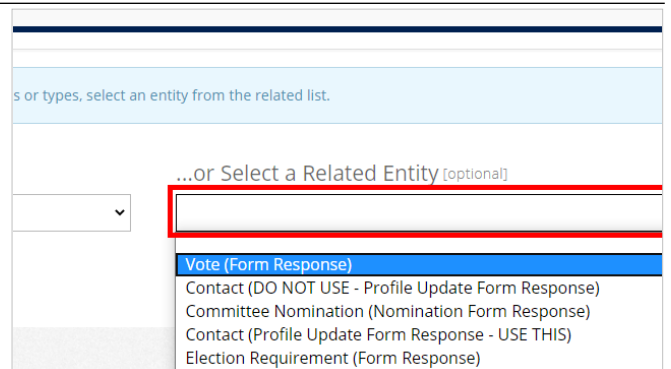


Click on the command button **Launch Designer**

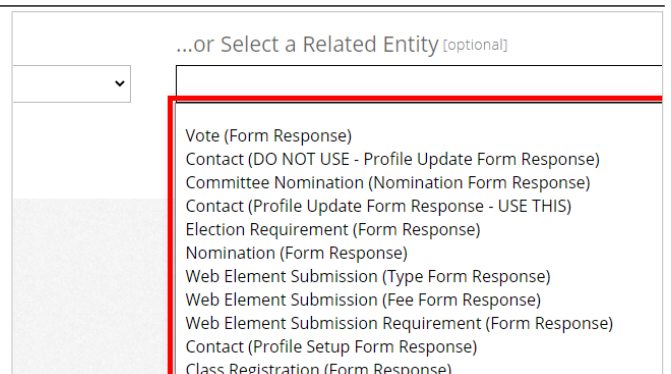


Form must be configured for the process you plan to use it in.

For a membership application form, choose "Membership Application".



Click on the item **Membership Application (Form Response)** in the list





RAMCO Portal

Click on the button **Configure Form**

Use this combo box to add mapped questions to your form.

Mapped questions will update the member's data when submitted.

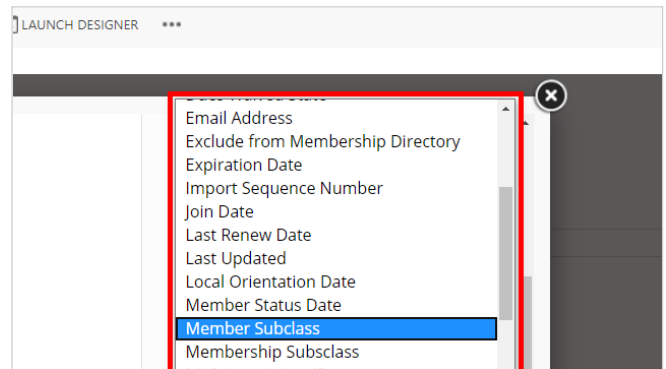
Click on the item **Membership (Membership)** in the list

Click on the combo box

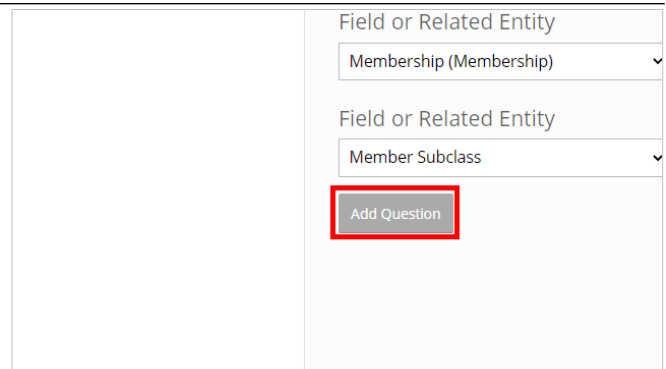


RAMCO Portal

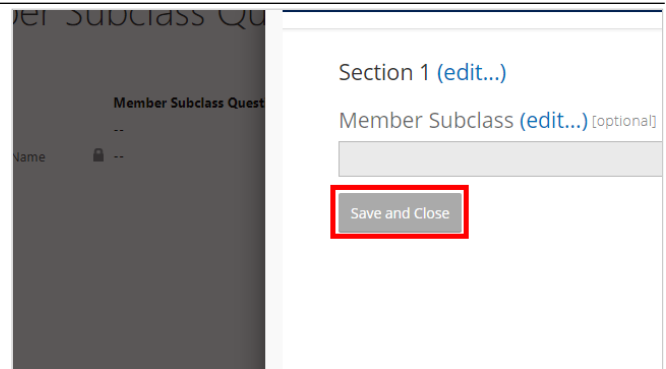
Click on the item **Member Subclass** in the list



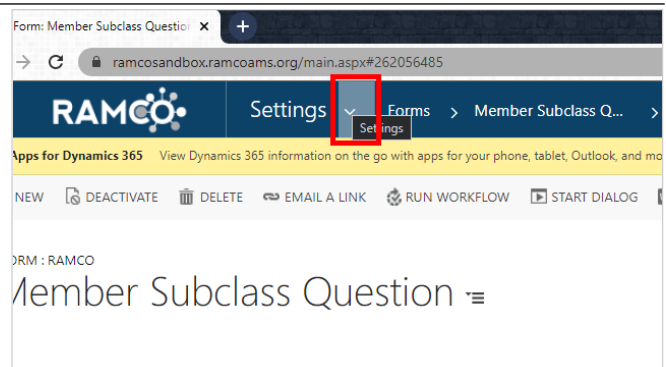
Click on the button **Add Question**



Click on the button **Save and Close**



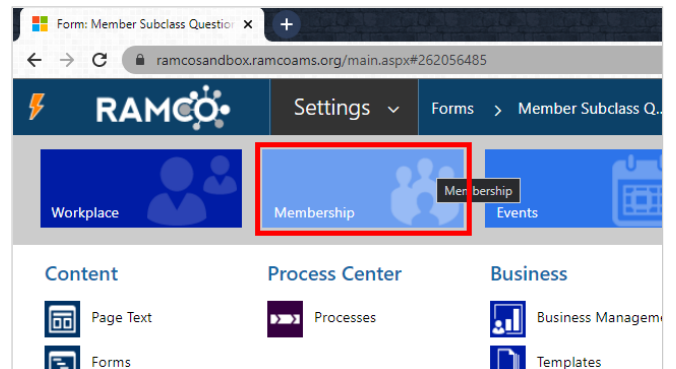
Once again open the navigation areas.



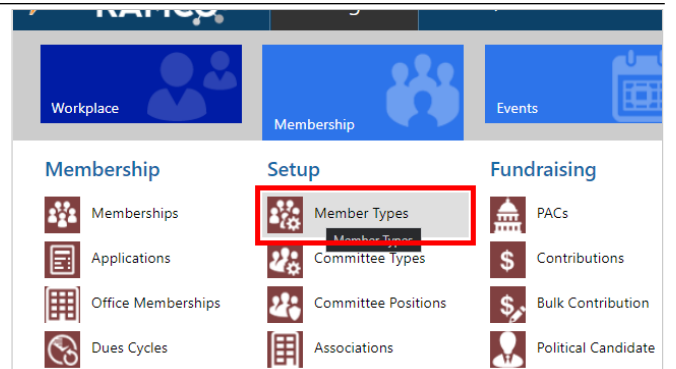


RAMCO Portal

Click on the navigation area **Membership**



Click on the link **Member Types**



Choose the REALTOR® member type.

Active Member Types

Name	(Deprecated) Display ...	Display on Portal	Apply Member
Affiliate	Yes	Yes	Yes
Institute Affiliate Member		Yes	Yes
LFRO		No	
MLS	No	No	Yes
Non-Member		No	
REALTOR	Yes	Yes	Yes
REALTOR Associate	Yes	Yes	Yes
Staff		No	Yes
Supra	No	No	Yes

Click on the lookup **Application Form**

WEB PORTAL

Member Directory Type: REALTOR

APPLICATION

Application Form: --

Display on Portal: Yes

Require License: Yes

Membership Activation: Manual

ERMS: --



RAMCO Portal

Add the form record we recently created.

Click save to complete the process.

The new question will now be asked during any REALTOR applications.

Mode	Member Type	Created On
Query	REALTOR	10/24/2019 3:29...
Order Paid	REALTOR	5/9/2019 12:37 ...
Query	REALTOR	10/24/2019 3:29...

3.2.2. Create a Dues Bill for a Member who Missed Dues Billing

Open the Navigation Areas

Choose the contacts entity.



RAMCO Portal

Search for the contact record of the person, then double click to open their contact record.

✓	Last Name ↑	First Name ↑	Parent Customer	Email
✓	Ramco	Remmy	Coldwell Banker Associated	Remmy.Ramco@test.t

Click the View Related Items

▼	Contacts >	Ramco, Remmy	▼
ADD TO MARKETING LIST			
ASSIGN			
EMAIL A LINK			

Choose related Memberships

Membership	Sales & Ac
Memberships	Committee Nominatio...
Member Education	Orders
Membership Applicati...	Invoice...
Member Financials	Paymer
	Paymer

Choose the membership that needs to be billed.

✓	Primary ...	Contact ↑	NRDS ID	Member Type...	Member S
No	Ramco, Remmy	505510506	MLS		
No	Ramco, Remmy	505510506	MLS		
No	Ramco, Remmy	505510506	MLS		
No	Ramco, Remmy	505510506	Supra		
Yes	Ramco, Remmy	505510506	REALTOR	R	



RAMCO Portal

Choose the Add Dues Item button.

The screenshot shows the top right corner of the RAMCO Portal interface. A red box highlights the 'Add Dues Item' button, which is a blue square with a white plus sign. To the right of the button is a small icon of a document with a plus sign. Below the button, there is a table with columns: 'Status Reason...', 'Pricing Stage', 'Dues Option', and 'Order'. The table contains one row with the following values: 've', 'Standard', 'Primary Agents - Full Pay...', and '2021 MLS Dues Cycle - f'. A tooltip 'Add Dues Item record.' is visible next to the button.

Select a Dues Cycle

The screenshot shows the 'New Dues Item' form. The 'Dues Cycle' field is highlighted with a red box. The form contains the following fields: 'Name' (Ramco, Remmy - REALTOR), 'Dues Cycle' (highlighted), 'Dues Option' (2021 Dues Renewal), 'Year' (2021), 'Paid' (locked), and 'Strategy Date' (2021). The 'Dues Cycle' field is a dropdown menu with a search icon.

Select a Dues Option

The screenshot shows the 'New Dues Item' form. The 'Dues Option' field is highlighted with a red box. The form contains the following fields: 'Name' (Ramco, Remmy - REALTOR), 'Dues Cycle' (2021 Dues Renewal), 'Dues Option' (highlighted), 'Year' (2021), 'Paid' (locked), and 'Strategy Date' (2021). The 'Dues Option' field is a dropdown menu with a search icon.

Click on the picklist **Pricing Stage**

The screenshot shows the 'New Dues Item' form. The 'Pricing Stage' field is highlighted with a red box. The form contains the following fields: 'Name' (Ramco, Remmy - REALTOR), 'Dues Cycle' (2021 Dues Renewal), 'Dues Option' (Primary Agents - Full Payment), 'Year' (2021), 'Paid' (locked), 'Pricing Stage' (highlighted), 'Strategy Date' (2021), 'Contribution Type' (locked), and 'Type' (locked). The 'Pricing Stage' field is a dropdown menu with a search icon. A tooltip 'Select to enter data' is visible next to the field.



RAMCO Portal

Select the appropriate billing stage.

ship*
le*
tion*
--
--
--
--
stage
Strategy Date
tion Type
ve

Ramco, Remmy - REALTOR
2021 Dues Renewal
Primary Agents - Full Payment
--
Standard
Late Fee Applied
Late Fee 2 Applied
Reinstatement Fee Applied

Click on the command button **Save & Close**

Dues Item: New Dues Item - Google Chrome
ramcosandbox.ramcoams.org/main.aspx?etc=10128&extraqs=%3f_CreateFromId%3d%257b3BEF2
RAMCO New Dues Item
SAVE SAVE & CLOSE + NEW FORM EDIT
DUES ITEM : RAMCO
New Dues Item
Name --

3.2.3. Change Price of a Single Line Item (Renewal Bills)

Click on the View Related Items button.

Orders > MLS Dues Cycle - Pri...
MLS Dues Cycle - Primary Agent
VOICE PROCESS FULFILL ORDER CANCEL ORD
ary Agent

Click on the link **Dues Items**

Workplace Orders > MLS Dues Cycle - Pri...
Common Related Record Sources System
Invoices Contributions
Audit History Dues Items
Connections Publication Subscripti...
ORD 01046 Y78482



RAMCO Portal

Double click on Dues Item to open it.

Dues Item Associated View ▾

+ ADD NEW DUES ITEM ADD EXISTING DUES ITEM BL

✓	Membership ↑	Date Paid	Status Reason...	Dues Cycle
✓	Contact 05, Example - RE...		Pending	MLS Dues Cycle

Double click on the dues order product you wish to change.

y REALTORS® Dues Order Products

Payment Group By: (no grouping) ▾

y REALTORS®

\$200.00	No	No
\$150.00	No	No
\$35.00	No	No
\$50.00	No	No
\$176.00	No	No

Update this field to the desired amount.

ing

ount \$50.00

rridden Yes

ulated No

Out* No

Toggle "Overriden" to yes so the new price sticks.

ing

ount \$50.00

rridden Yes

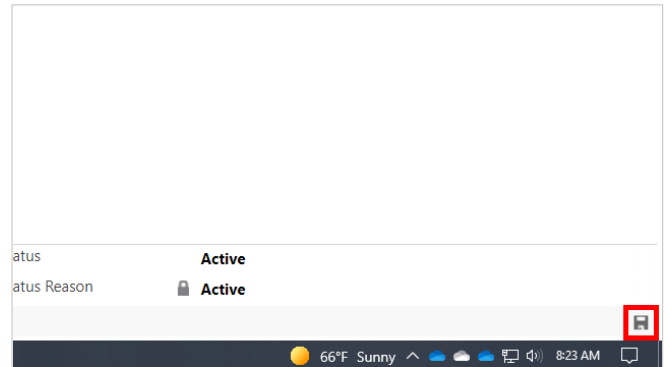
ulated No

Out* No

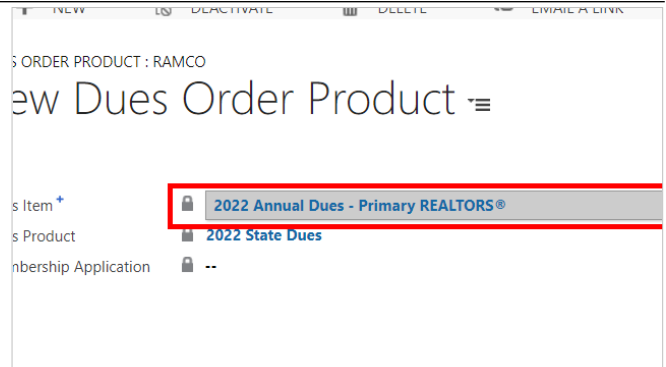


RAMCO Portal

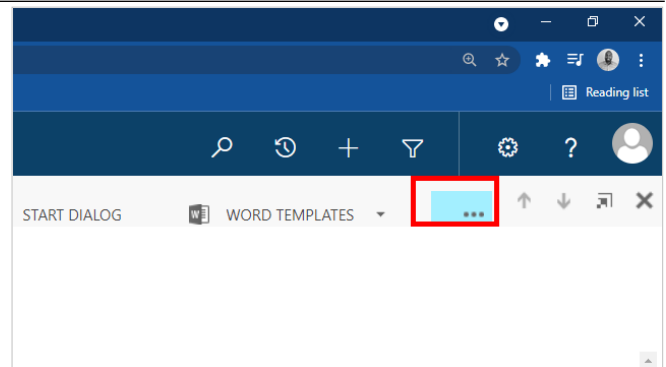
Click save



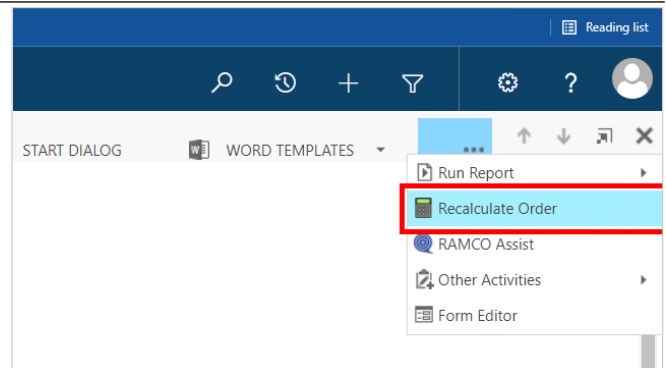
Click on the Dues Item to return to it.



Click Recalculate Order in the Command Bar. If you cannot see it, choose the more commands option.



Then click on Recalculate Order, to complete the process.



Please restart this assist from an Order record.

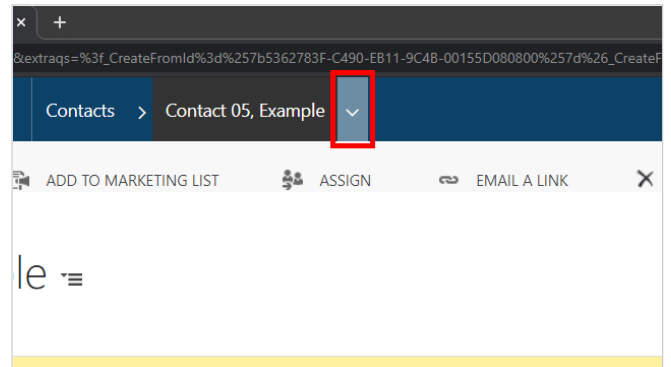
3.2.4. Remove Dues Bill from Member (Duplicate or Mistake)

Yes

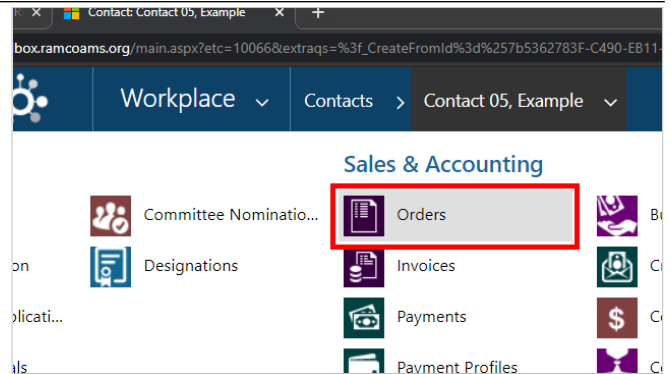


RAMCO Portal

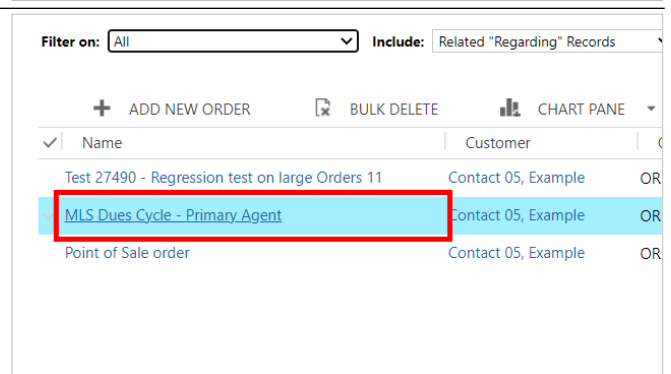
Click the "View Related" button



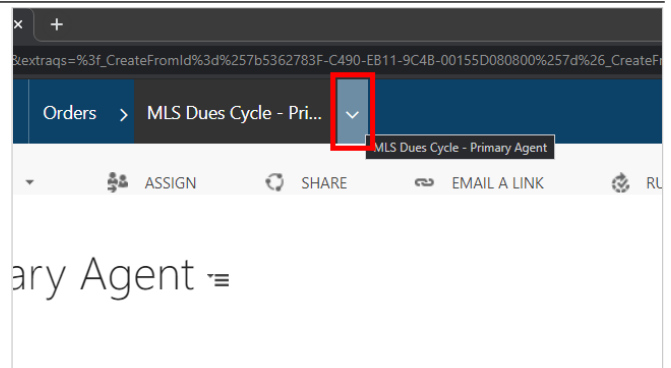
Choose the related "Orders"



Click on the name of the order that is a mistake or a duplicate bill.



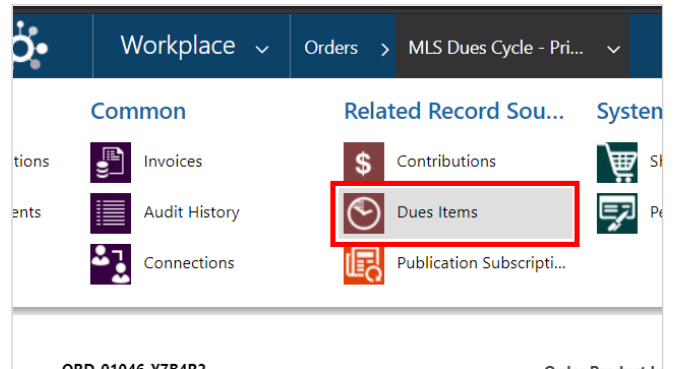
Click on the item related to this order



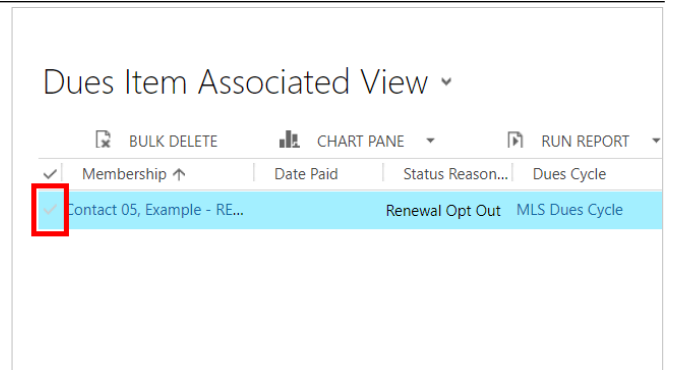


RAMCO Portal

Choose related "Dues Items"

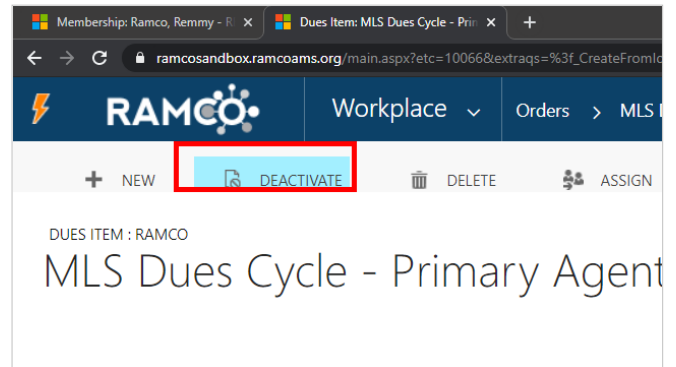


Open the dues item

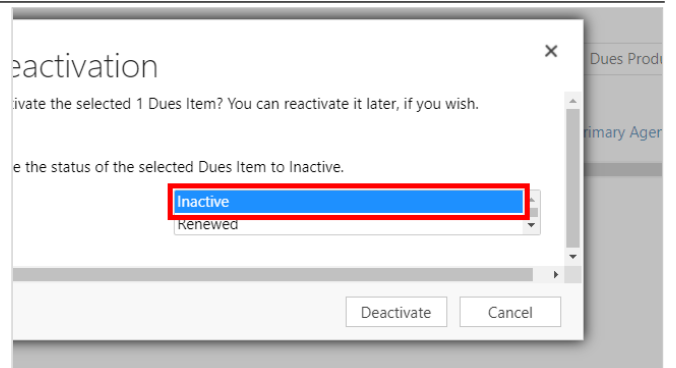


Deactivate the dues item.

This must be done before cancelling the order, to prevent the member from being shut off.



Choose the "Inactivate" status, any other option could result in the member being shut off.





RAMCO Portal

Click Deactivate to confirm.

A modal dialog box with a title bar. The main text says "the status of the selected Dues Item to Inactive." Below this is a text input field containing the word "Inactive". At the bottom right, there are two buttons: "Deactivate" (highlighted with a red box) and "Cancel".

Please restart this assist from the member's contact record.

3.2.5. Remove Dues Bill from Member (Member Not Renewing)

Click the "View Related" button

A screenshot of the RAMCO Portal interface. The top navigation bar shows "Contacts > Contact 05, Example" with a dropdown arrow. Below the navigation bar, there are buttons for "ADD TO MARKETING LIST", "ASSIGN", and "EMAIL A LINK". The main content area is partially visible, showing the word "le".

Choose the related "Orders"

A screenshot of the "Sales & Accounting" section in the RAMCO Portal. The section is titled "Sales & Accounting" and contains several icons and labels: "Committee Nominatio...", "Designations", "Orders" (highlighted with a red box), "Invoices", "Payments", and "Payment Profiles".

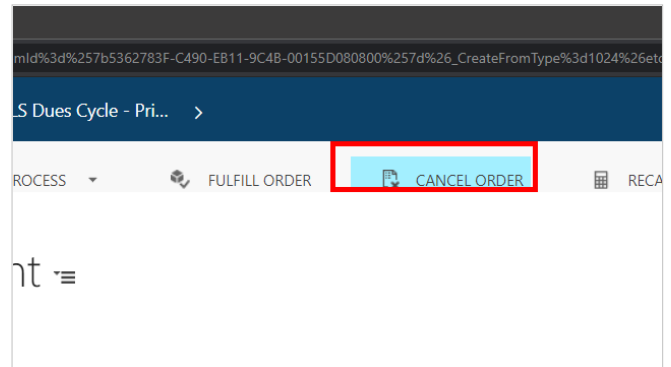
Click on the name of the order the member is not planning to renew

A screenshot of the "Orders" list in the RAMCO Portal. The list has a filter set to "Active" and an "Include" dropdown set to "Related 'Regarding' Records". The list contains two rows: "Test 27490 - Regression test on large Orders 11" and "MLS Dues Cycle - Primary Agent" (highlighted with a red box). The columns are "Name", "Customer", and "OR".



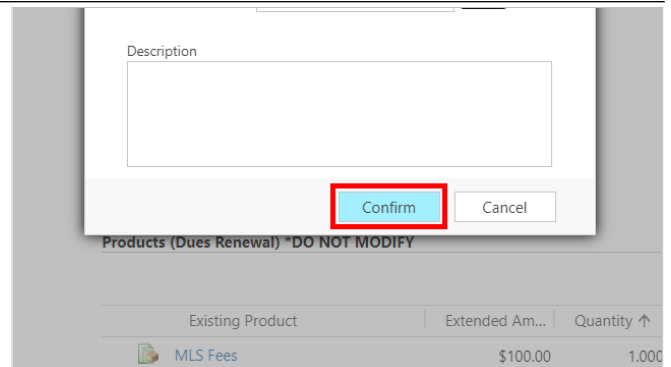
RAMCO Portal

Click the "Cancel Order" button



Click confirm to complete the process.

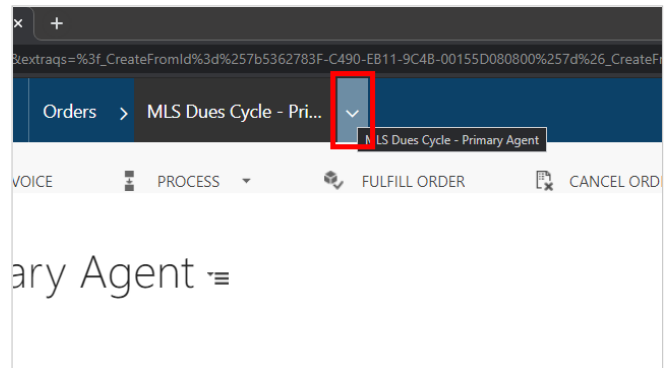
Nothing else needs to be done. The member will be allowed to finish out their current membership term. At the end, the member will be inactivated along with all other members who did not renew.



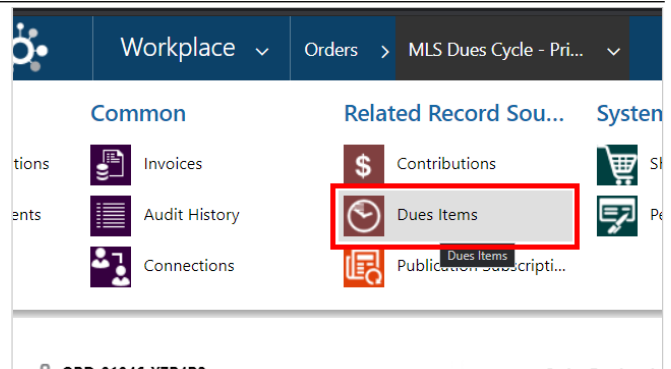
Please restart this assist when you are on the contact record

3.2.6. Change Price of a Single Line Item (Renewal Bills)

Click on the View Related Items button.



Click on the link **Dues Items**





RAMCO Portal

Double click on Dues Item to open it.

Dues Item Associated View ▾

+ ADD NEW DUES ITEM ADD EXISTING DUES ITEM BL

✓	Membership ↑	Date Paid	Status Reason...	Dues Cycle
✓	Contact 05, Example - RE...		Pending	MLS Dues Cycle

Double click on the dues order product you wish to change.

y REALTORS® Dues Order Products

Payment Group By: (no grouping) ▾

y REALTORS®

\$200.00	No	No
\$150.00	No	No
\$35.00	No	No
\$50.00	No	No
\$176.00	No	No

Update this field to the desired amount.

ing

ount

rridden

ulated

Out *

\$50.00

Yes

No

No

Toggle "Overriden" to yes so the new price sticks.

ing

ount

rridden

ulated

Out *

\$50.00

Yes

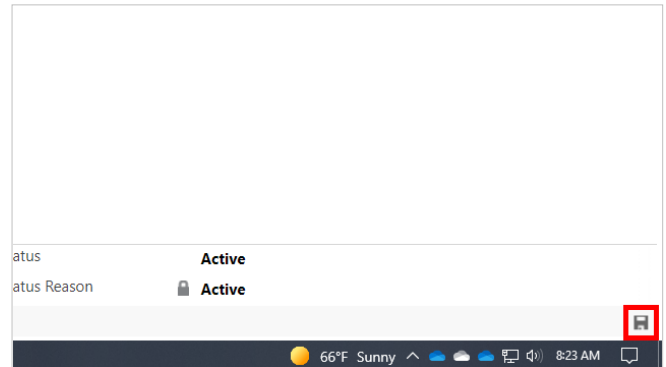
No

No

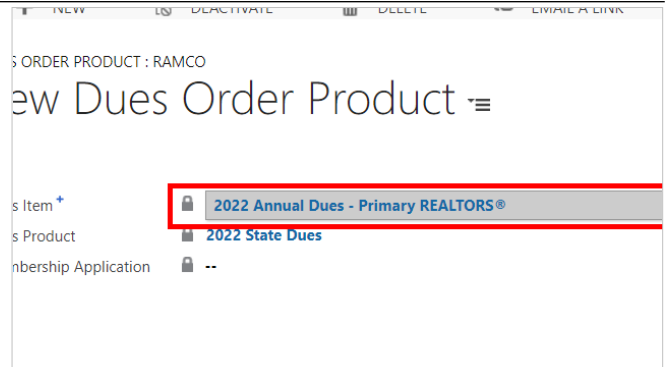


RAMCO Portal

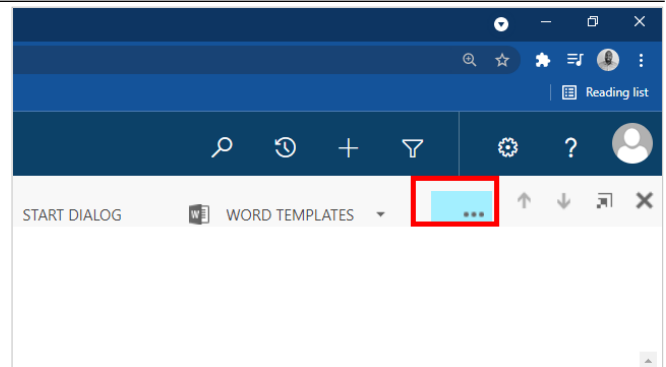
Click save



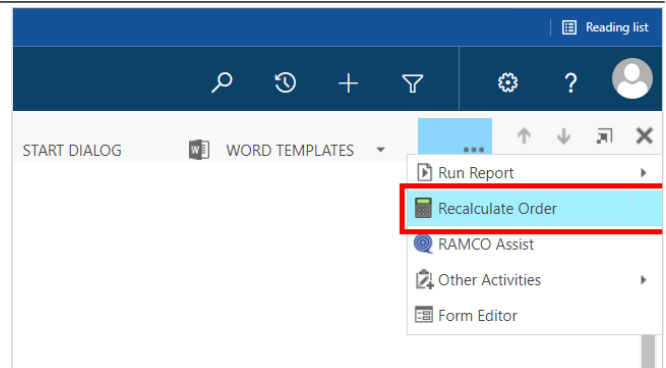
Click on the Dues Item to return to it.



Click Recalculate Order in the Command Bar. If you cannot see it, choose the more commands option.



Then click on Recalculate Order, to complete the process.



Please restart this assist from an Order record.



RAMCO Portal

4. Events

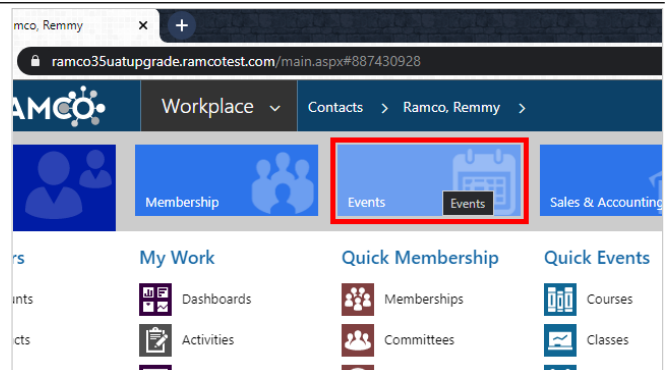
4.1. Classes

4.1.1. Add a Class

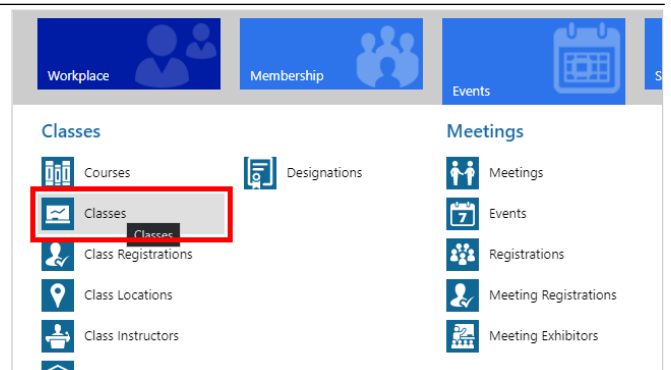
Open the Navigation Areas.



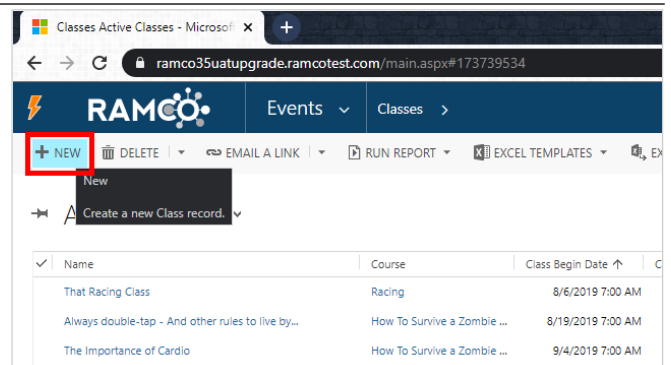
Click on the navigation area **Events**



Click on the "Classes" entity.



Click on the command button **New**





RAMCO Portal

Click on the search button of field **Course**

NEW CLASS

Course *

Class Begin Date *

Class End Date *

Full Day

Delivery Method

Location

Meeting

Staff Contact

Active Class Registrations

Search for records

Contact ↑

To enable this content, create the record.

Search for the appropriate course and select it.

Course *

Class Begin Date *

Class End Date *

Full Day

Delivery Method

Location

Meeting

Staff Contact

How To Survive a Zombie Apocalypse ZOMB St Paul Association of REALORS ®

Maddie's Test Course

MikeC - Course 35 - 001 2019C6 MikeC - Course Provider

Puginomics

Racing Puginomics

Reggie Lopez Test Case 25222 2019c6

Look Up More Records

Click on the field **Name**

CLASS : RAMCO

New Class

Course *

Name *

Class Begin Date *

Class End Date *

Full Day

Delivery Method

Location

Meeting

Staff Contact

Puginomics

Select to enter data

Enter the name of the class.

CLASS : RAMCO

New Class

Course *

Name *

Class Begin Date *

Class End Date *

Full Day

Delivery Method

Location

Meeting

Staff Contact

Puginomics



RAMCO Portal

Click on the date button **Class Begin Date**

MCO
New Class

Puginomics
Class Name

Class Begin Date

Class End Date

Full Day

Delivery Method

Location

Meeting

Staff Contact

Order Source

Enter the class begin date.

Puginomics
Class Name

Active Class Registration

Search for records

Contact

To enable this content,

Click on the date field **Class End Date**

CLASS : RAMCO
New Class

Puginomics
Class Name

Class Begin Date

Class End Date

Full Day

Delivery Method

Location

Meeting

Staff Contact

Order Source

Click on the date button **Class End Date**

MCO
New Class

Puginomics
Class Name

Class Begin Date

Class End Date

Full Day

Delivery Method

Location

Meeting

Staff Contact

Order Source



RAMCO Portal

Select the class end date.

Click on the time button **Class End Date**

Select the end class time.

1. Select a delivery method. (Optional)

1. Click on the search button of field **Location**
2. Lookup the appropriate location for this class. If it does not exist, you may click new to create it.



RAMCO Portal

1. Click on the search button of field **Staff Contact**
2. Lookup the appropriate staff contact.

--

Cutlip, Mike

Dohm, Thomas

Fox, Thom

Jackson, Phelicia

Last name, First name

Lopez, Reggie

McCormick, Lopez, Reggie

8 results

+ New

1. Click on the lookup **Sponsoring Association** - Enter the sponsoring association's name.
2. Click on the lookup **Hosting Association** - Enter the hosting association's name.

--

Lopez, Reggie

--

NATIONAL ASSOCIATION OF REALTORS®

No

Set the "Publish to Portal" field.

CLASS : RAMCO

New Class

Course *

Name *

Class Begin Date *

Class End Date *

Full Day

Delivery Method

Location

Meeting

Staff Contact

Order Source

Sponsorship Association *

Puginomics

Class Name

3/27/2020 8:00 AM

3/27/2020 2:00 PM

No

Classroom

The Traveler

--

Lopez, Reggie

--

NATIONAL ASSOCIATION OF REALTORS®

1. Set the registration begin and end date. This controls the window of time where people can register for this class.
2. Click on the date button **Registration Begin Date**
3. Click on the date button **Registration End Date**

Invitation Only *

Registration Begin Date

Registration End Date

Max Attendance

Eligible for One Click Registr

Allow Waitlist

Waitlist Automated Promoti

No

3/1/2020 8:00 AM

11/1/2020 8:00 PM

No

No

--



RAMCO Portal

Click on the field **Max Attendance**

Current Waitlist Registration: --

Invitation Only* **No**

Registration Begin Date **3/1/2020 8:00 AM**

Registration End Date **3/27/2020** 8:00 AM

Max Attendance **--**

Eligible for One Click Registr **No** [Select to enter data](#)

Allow Waitlist **No**

Waitlist Automated Promoti **--**

FINANCIAL

Set the maximum number of attendees for this class.

Current Waitlist Registration: --

Invitation Only* **No**

Registration Begin Date **3/1/2020 8:00 AM**

Registration End Date **3/27/2020 8:00 AM**

Max Attendance **1**

Eligible for One Click Registr **No**

Allow Waitlist **No**

Waitlist Automated Promoti **--**

FINANCIAL

1. Enter the preview summary. - Set the class description.
2. Enter the cancellation policy.

DESCRIPTION

Rich text editor toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, undo, redo, and other formatting options.

1+2+

Click on the toggle field **Outside Provider**

FINANCIAL

Revenue Recognition Date* --

OUTSIDE PROVIDER

Outside Provider **No**

Message **--** [No](#)

Link **--**

DESCRIPTION & INSTRUCTORS

Preview Summary



RAMCO Portal

Click on the field **Message**

FINANCIAL

Revenue Recognition Date ⁺ --

OUTSIDE PROVIDER

Outside Provider Yes

Message --

Link --

▸ DESCRIPTION & INSTRUCTORS

Preview Summary

Enter preview summary

Enter **Message**.

FINANCIAL

Revenue Recognition Date ⁺ --

OUTSIDE PROVIDER

Outside Provider Yes

Message E

Link --

▸ DESCRIPTION & INSTRUCTORS

Preview Summary

Enter preview summary

Click on the field **Link**

FINANCIAL

Revenue Recognition Date ⁺ --

OUTSIDE PROVIDER

Outside Provider Yes

Message Enter Registration Message Here

Link --

▸ DESCRIPTION & INSTRUCTORS

Preview Summary

Enter preview summary

Detailed Description

Enter **Link**.

FINANCIAL

Revenue Recognition Date ⁺ --

OUTSIDE PROVIDER

Outside Provider Yes

Message Enter Registration Message Here

Link E

▸ DESCRIPTION & INSTRUCTORS

Preview Summary

Enter preview summary

Detailed Description



RAMCO Portal

Enter **Link**.

Revenue Recognition Date + --

OUTSIDE PROVIDER

Outside Provider Yes

Message Enter Registration Message Here

Link

DESCRIPTION & INSTRUCTORS

Preview Summary

Enter preview summary

Detailed Description

Click on the command button **Save**

Class: New Class

ramco35uatupgrade.ramcotest.com/main.aspx#270033776

RAMCO Events Classes > New Class

SAVE SAVE & CLOSE + NEW FORM EDITOR

CLAS Save this Class.

New Class

Click on the link **Add Class Registration Fee record.**

End Date

[Add Class Registration Fee record.](#)

Enter a name for the registration fee.

CLASS REGISTRATION FEE : RAMCO

Example Registration Fee - Comp

Name * Example Registration Fee - Comp

Class * Example Class - W

Product * Complimentary

Cancellation Fee --

Begin Date * 5/1/2019 12:00 AM

End Date * 5/30/2020 12:00 AM



RAMCO Portal

Click on the product field and add a product.

E : RAMCO

s Registrati...

registration fee name	DESCRIPTION
Class Name	--
--	--
--	--
--	--
--	--
Yes	--
--	--

Click on the search button of field **Cancellation Fee**

E : RAMCO

s Registrati...

registration fee name	DESCRIPTION
Class Name	--
Activity Registration	--
--	--
--	--
--	--
Yes	--
--	--

Select product as a cancellation fee. This will only be used if the registration is cancelled and the contact is owed a refund. RAMCO will deduct this product from the amount owed.

New Class Registrati...

Name *	registration fee name
Class *	Class Name
Product *	Activity Registration
Cancellation Fee	
Begin Date	\$0 Cancellation Product 03112020 \$0.00
End Date	\$0 DUES Product 0duesproduct \$0.00 \$0.00
Form	1 big dog 1bd
Publish to Portal	1 That Test Product 03242020 \$8.00
Sort Order	2019 - Dues - Local MikeDuesLocal \$200.00
System Query	

Click on the date field **Begin Date**

New Class Registrati...

Name *	registration fee name	DESCRIPTION
Class *	Class Name	--
Product *	Activity Registration	--
Cancellation Fee	\$0 Cancellation Product	--
Begin Date	--	--
End Date	--	Select to enter data
Form	--	--
Publish to Portal	Yes	--
Sort Order	--	--
System Query	--	--



RAMCO Portal

1. Enter a begin date.
2. Click on a day number. In this example the day 1

Click on the date field **End Date**

1. Enter an end date.
2. Click on a day number. In this example the day 27

Click on the command button **Save & Close**

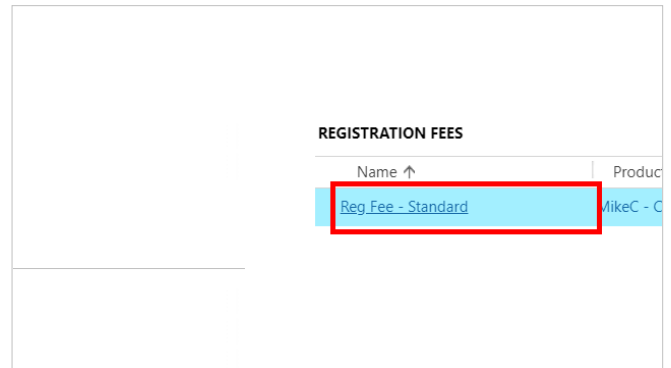


RAMCO Portal

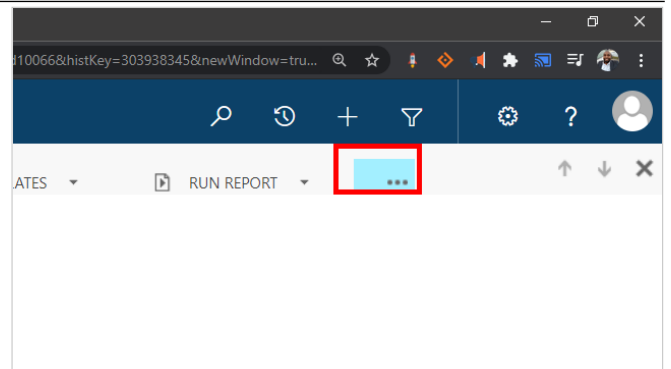
4.1.2. Add Query to Class Registration

Add a query to a registration fee will restrict who is allowed to use it. In this example, we will restrict this to REALTORS only, but you can use any query you like.

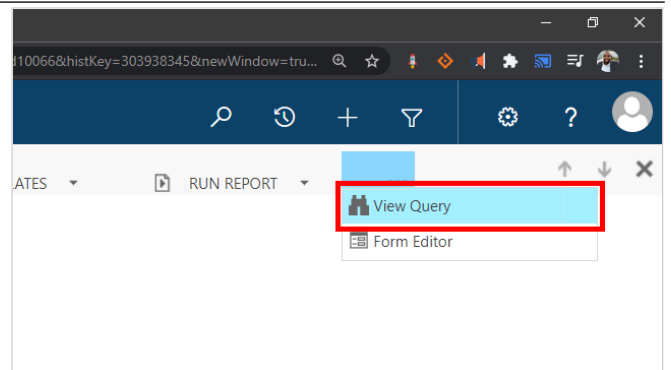
To begin, select the registration fee to restrict



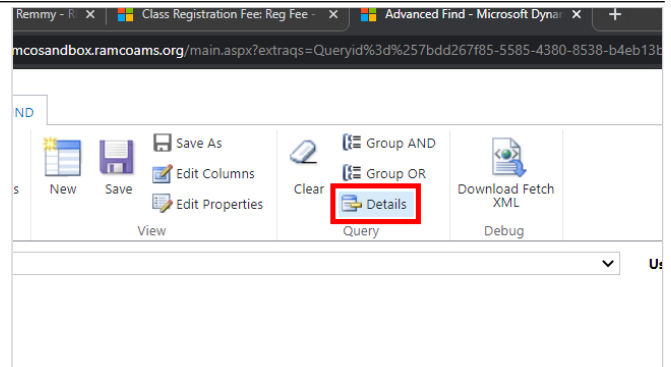
Choose "More Commands" to open the menu



Choose "View Query" from the menu



Ensure "Details" are enabled so you can edit the query.





RAMCO Portal

Select the drop down

The screenshot shows the 'Look for:' dropdown menu in the RAMCO Portal. The dropdown is open, and the 'Memberships (Contact)' option is highlighted. The dropdown menu is highlighted with a red box.

Choose "Memberships (Contact)" from the list

The screenshot shows the 'Look for:' dropdown menu in the RAMCO Portal. The dropdown is open, and the 'Memberships (Contact)' option is selected. The dropdown menu is highlighted with a red box.

Select the drop down.

The screenshot shows the 'Look for:' dropdown menu in the RAMCO Portal. The dropdown is open, and the 'Memberships (Contact)' option is selected. The dropdown menu is highlighted with a red box.

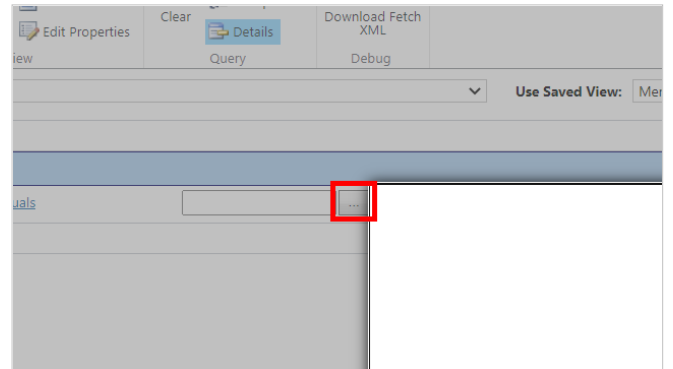
Choose "Status" from the list

The screenshot shows the 'Look for:' dropdown menu in the RAMCO Portal. The dropdown is open, and the 'Status' option is selected. The dropdown menu is highlighted with a red box.

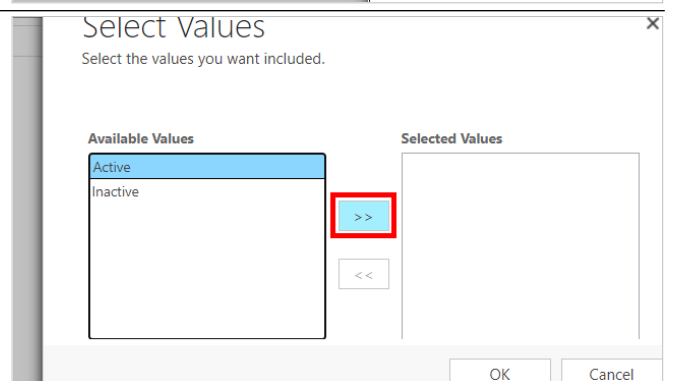


RAMCO Portal

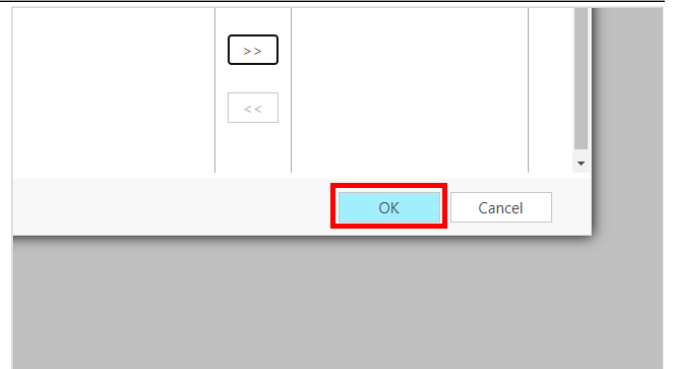
Click on the button **Select or change the values for this field**



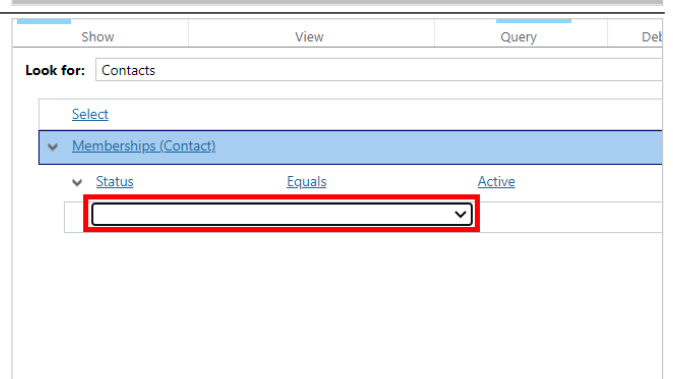
Move "Active" to the Selected Values area



Click on the button **OK**



Select the drop down





RAMCO Portal

Choose "Member Type" from the list

A screenshot of the RAMCO Portal interface. A dropdown menu is open, showing a list of fields including 'Join Date', 'Last Renew Date', 'Last Updated', 'Local Orientation Date', 'Member Status Date', 'Member Subclass', 'Member Type' (highlighted in blue), 'Membership', 'Membership Subclass', 'MLS Association ID', 'MLS ID', 'MLS Status', and 'Modified By'. The dropdown is framed by a red rectangle.

Add the REALTOR member type

A screenshot of the RAMCO Portal interface. The 'Member Type' dropdown menu is open, showing a list of fields including 'Join Date', 'Last Renew Date', 'Last Updated', 'Local Orientation Date', 'Member Status Date', 'Member Subclass', 'Member Type' (highlighted in blue), 'Membership', 'Membership Subclass', 'MLS Association ID', 'MLS ID', 'MLS Status', and 'Modified By'. The dropdown is framed by a red rectangle.

Click save to complete the process.

This registration fee can now only be accessed by those contacts returned by the query.

A screenshot of the RAMCO Portal interface. The 'Save' button is highlighted with a red rectangle. The button is located in the 'FILE' menu, which is open. The 'Save' button is labeled 'Save' and has a small icon next to it. The 'FILE' menu is open, showing options like 'Query', 'Saved Views', 'Results', 'New', 'Save', 'Save As', 'Edit Columns', 'Edit Properties', 'View', 'Group AND', 'Group OR', 'Details', and 'Download'. The 'Save' button is highlighted with a red rectangle.

Please restart this assist from a class

4.1.3. Cancel Class Registration Wizard

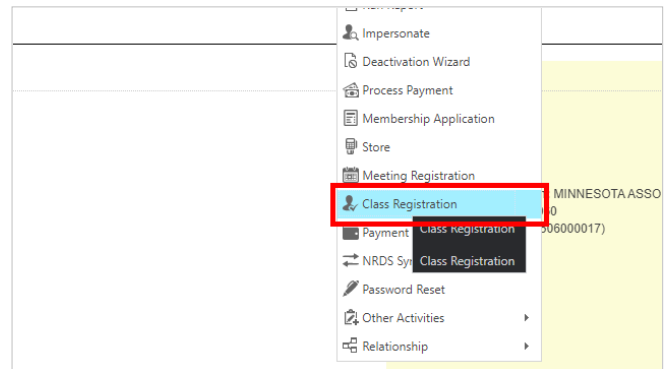
From a person's contact record click the More Commands button

A screenshot of the RAMCO Portal interface. The 'More Commands' button is highlighted with a red rectangle. The button is located in the top right corner of the interface, next to the 'DELETE', 'FORM', 'PROCESS', and 'SHARE' buttons. The 'More Commands' button is labeled 'MORE COMMANDS' and has a small icon next to it.

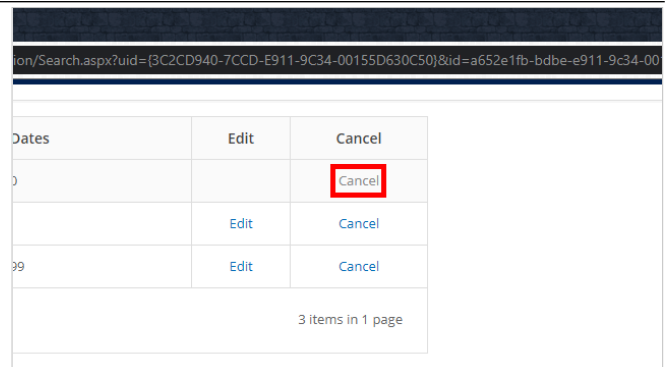


RAMCO Portal

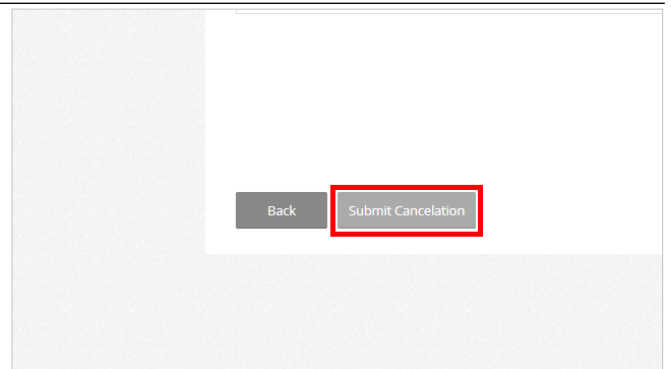
Click on the command button **Class Registration**



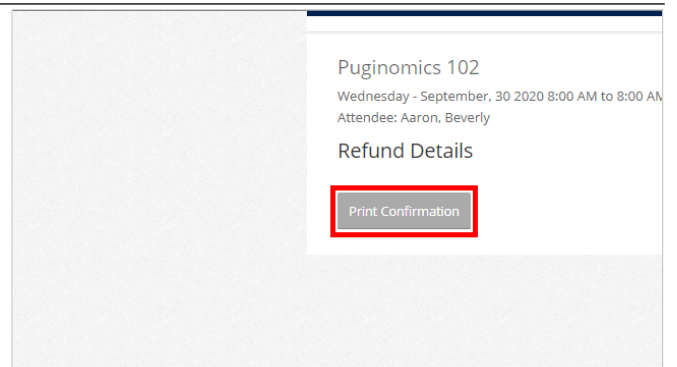
From their list of current registrations, click Cancel on the registration they wish to cancel



Click on the button **Submit Cancellation**



Click Print Confirmation, if applicable.

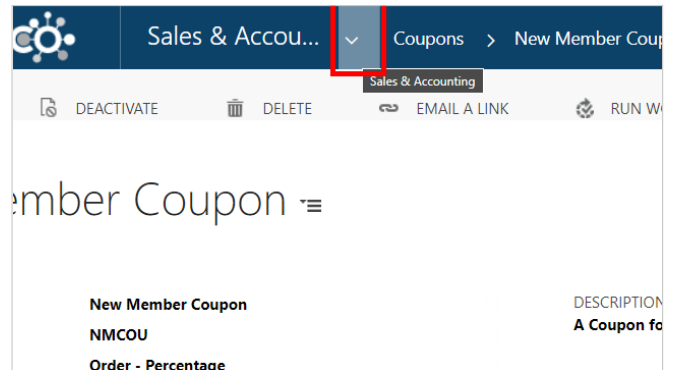




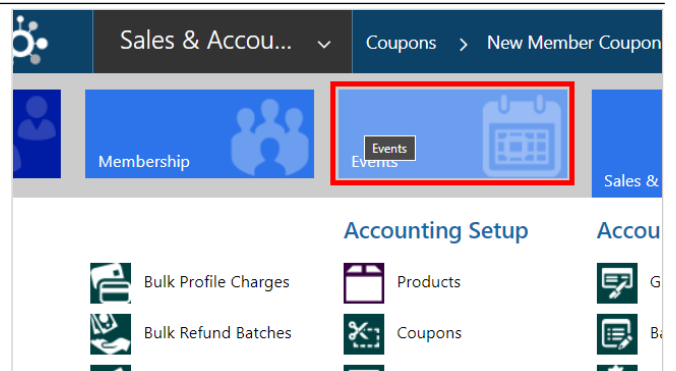
RAMCO Portal

4.1.4. Create and Add a Document to A Class

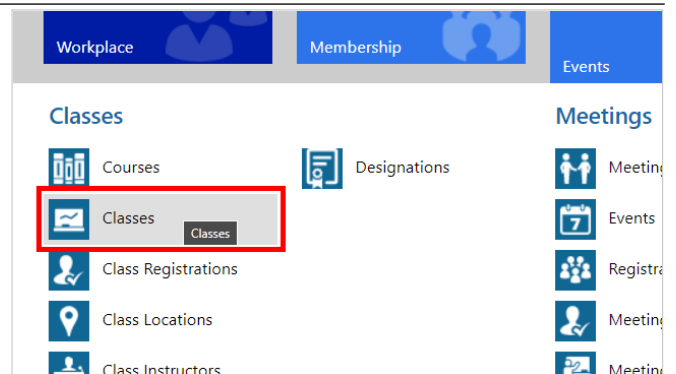
Open the Navigation Areas



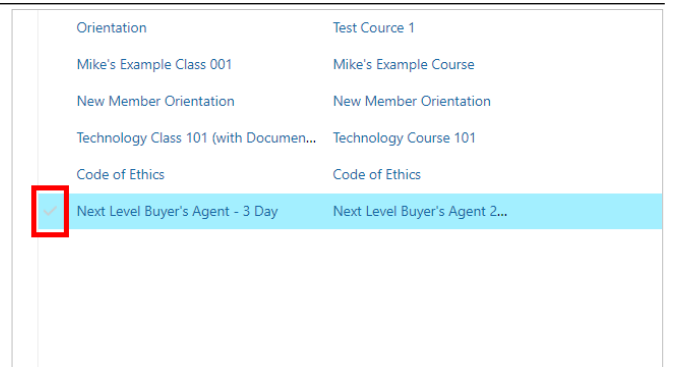
Choose the Events area



Choose the Classes entity



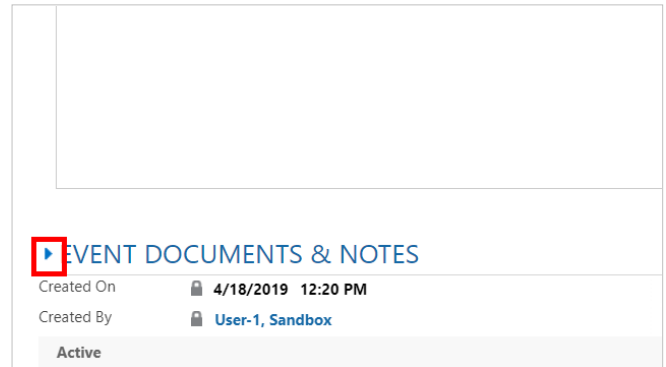
Choose a Class to add a document to, then open it.





RAMCO Portal

Scroll to the bottom of the Class, and open the "Event Documents & Notes" tab.



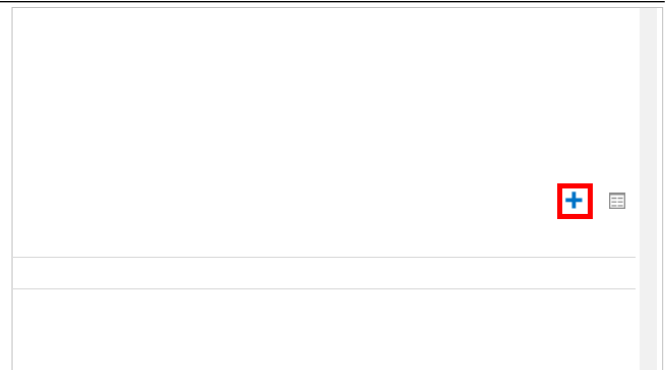
EVENT DOCUMENTS & NOTES

Created On 4/18/2019 12:20 PM

Created By User-1, Sandbox

Active

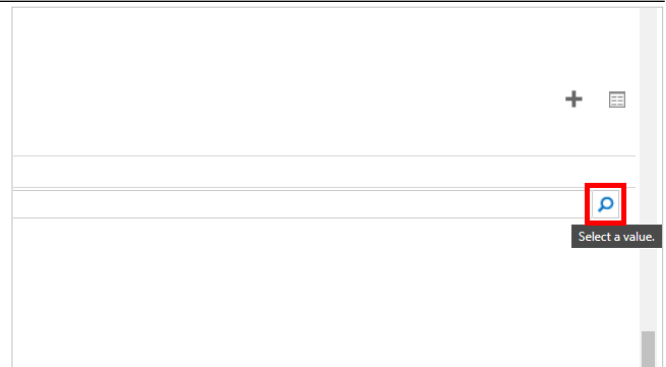
Click on the Magnifying glass to add an Event Document



+

+

Click on the magnifying glass to search for Event Documents. If this is the first time using a specific document, you will need to create it in RAMCO first

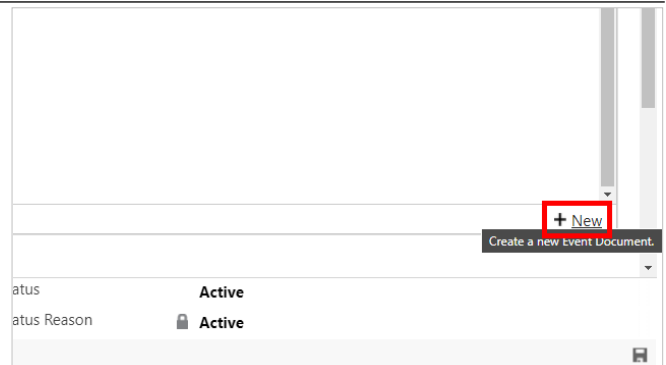


+

+

Select a value.

To create a new Event Document click the "New" button



+

+

Create a new Event Document.

Active

Active



RAMCO Portal

Give the document a name

EVENT DOCUMENT : RAMCO

New Event Document

GENERAL

Document Name *

Type * --

URL --

Description

Choose when the document will be available on the portal

TES

New Event Document

GENERAL

Document Name * **KU Parking Map**

Type *

URL

Description

Enter the URL or Link for the document

New Event Document

GENERAL

Document Name * **KU Parking Map**

Type * **Attendees**

URL

Description

Choose how the document will display.

Sort Order --

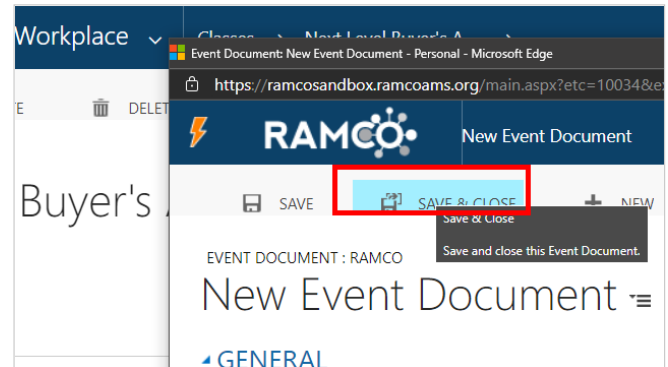
Display Behavior *

u.edu/files/docs/parkingmap.pdf



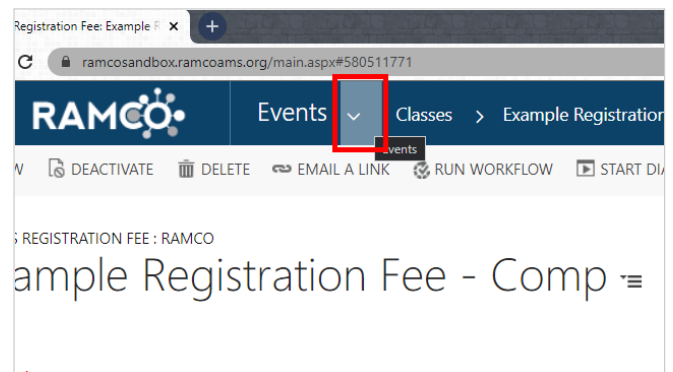
RAMCO Portal

Click Save and Close to complete the Event Document

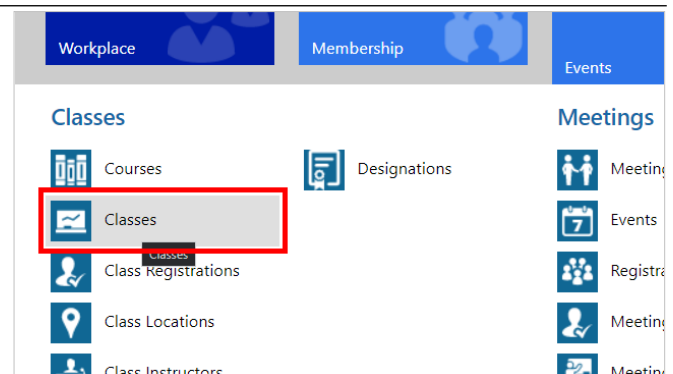


4.1.5. Hide Class on Portal from Non-REALTOR Members

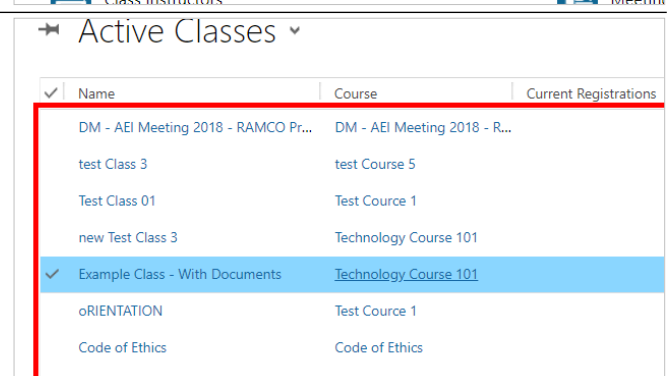
Open the Navigation Areas.



Click on the "Classes" entity.



Open the class record.





RAMCO Portal

Set Invitation Only to "Yes"

REGISTRATION SETTINGS

Current Registrations: --
Current Waitlist Registration: --

Invitation Only*: **No**

Registration Begin Date: 3/17/2020 8:00 AM
Registration End Date: 3/27/2020 8:00 AM
Max Attendance: 100
Eligible for One Click Register: No
Allow Waitlist: No
Waitlist Automated Promotion: --

Click on the command button **MORE COMMANDS**

FLOW | START DIALOG | WORD TEMPLATES | ...

You must set a query for who is allowed to see this Class.

For this example, we will set it to REALTORS only.

Start by choosing View Query.

FLOW | START DIALOG | WORD TEMPLATES | ...

Run Report
View Query
Other View Query
Form Query used to define who is eligible to register for

Make sure Details are enabled so that you may update the Advanced Find

Class Example | Advanced Find - Microsoft Dynamics 365

ramco35uatupgrade.ramcotest.com/main.aspx?extraqs=Queryid%3d%257b37804a71-83e...

ADVANCED FIND

Save As | Edit Columns | Edit Properties | Clear | Group AND | Group OR | Download Fetch XML | Debug

Details

Hide the query lines from view.



RAMCO Portal

Click the drop-down menu to view the fields and related entities.

The screenshot shows the top section of the RAMCO Portal. At the top, there is a 'FILE' tab and an 'ADVANCED FIND' tab. Below these are several icons for 'Query', 'Saved Views', 'Results', 'New', 'Save', 'Save As', 'Edit Columns', 'Edit Properties', 'Clear', 'Group AND', 'Group OR', 'Details', and 'Download Fetch XML'. Below the icons, there is a 'Look for:' field with the text 'Contacts' and a red box around the drop-down arrow.

Choose the relationship called "Memberships (Contact)"

The screenshot shows the 'Look for:' field with a red box around the drop-down menu. The menu is open, showing a list of relationships. The relationship 'Memberships (Contact)' is highlighted in blue. A red box is also around the 'Memberships (Contact)' text in the list.

Open the next drop-down menu

The screenshot shows the 'Look for:' field with a red box around the drop-down menu. The menu is open, showing a list of relationships. The relationship 'Memberships (Contact)' is highlighted in blue. A red box is also around the 'Memberships (Contact)' text in the list.

Click the magnifying glass, scroll down and choose search for more records

The screenshot shows the 'Look for:' field with a red box around the magnifying glass icon. The menu is open, showing a list of relationships. The relationship 'Memberships (Contact)' is highlighted in blue. A red box is also around the 'Memberships (Contact)' text in the list.



RAMCO Portal

Search for your association by name, check it, then press Select.

PAUL BUNYAN BOARD OF REALTORS®
PAULDING BOARD OF REALTORS®
✓ ST PAUL AREA ASSOCIATION OF REALTORS® INC
1 - 3 of 3 (1 selected)
Selected records:
Select
Remove
New

Click on the button **Add**

1 - 3 of 3 (1 selected) Page 1
Selected records:
ST PAUL AREA ASSOCIATION OF REALTORS® INC
Select
Remove
New **Add** Cancel

Open the next drop-down menu, then choose the member type Field

Look for: Contacts
Select
Memberships/(Contact)
Association Equals ST PAUL AREA ASSO...
Member Type
Select

In the lookup field, search for the member type REALTOR

Member Type
Membership
MLS Association
MLS ID
MLS Status
Modified By
Modified By (Delegate)
Modified On
Name
National Dues Paid Date
NRDS ID
NRDS Insert Date
NRDS Timestamp
Office
Online Status
Online Status Date
Out Out



RAMCO Portal

Open the drop-down and choose the "Status" field

Choose the "Status" field.

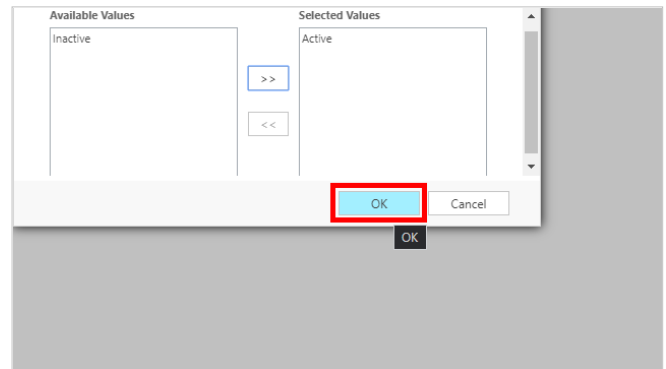
Click on the button **Select** or change the values for this field

Select "Active" then use the arrows to move it to the "Selected Values" area.

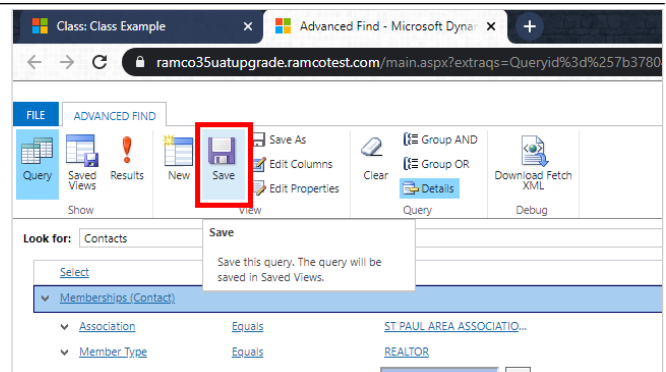


RAMCO Portal

Click on the button **OK**

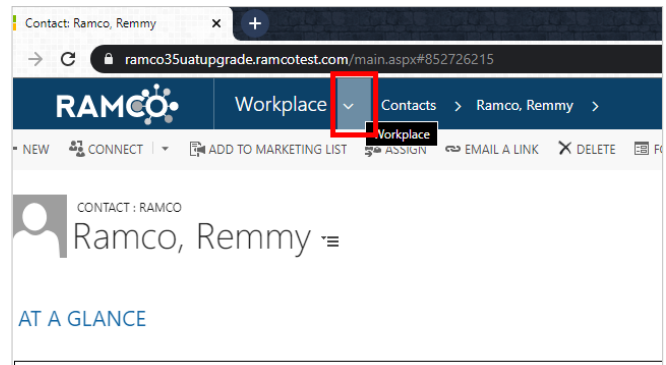


Click on the ribbon item **Save**

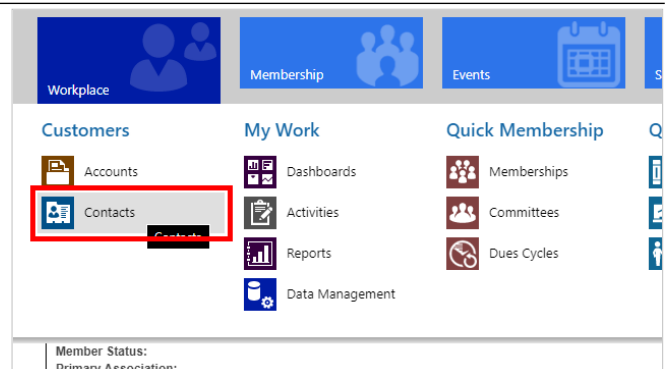


4.1.6. Registering for a Class

Open the Navigation Areas



Click on the "Contacts" entity.





RAMCO Portal

Search for the contact to register for a class

Search for records

Select the contact to register.

✓	Last Name ↑	First Name ↑	NRDS ID	Username	Parent Customer	Primary
	Ramco	Remmy			Remmy's Realty	

Click on the command button **MORE COMMANDS**

Click on the command button **Class Registration**

- Impersonate
- Deactivation Wizard
- Process Payment
- Membership Application
- Store
- Meeting Registration
- Class Registration**
- Payment Pro
- NRDS Sync
- Password Reset
- Other Activities
- Relationship



RAMCO Portal

Select a course from the course drop down field.

The contact is not registered for any upcoming classes.

Course [optional]
All Courses

End Date [opt

Start Date [optional]
[] [] []

Search by Keywo

Filter by Tag
Uncategorized Tag

Click search to view all upcoming classes related to that course.

MikeC - Tag 02

Physics

Time Management

That Category

That Other Tag That Up and Coming Tag

Cancel Search

Select the class you wish to register for.

That Category

That Other Tag That Up and Coming Tag

Search Again

Course	Location	Date
A Class That's Always Available		11/30/19 (8:00AM) to 11/06/99 (8:00AM)

<https://ramco35uatupgradeisv.ramcotest.com/CobaltIsv/Education/Registration/Details.aspx?cid=568977ce-e500-ea...>

Click on the button "Register Now" to begin the registration process. There may be unique questions associated with this class that you must answer.

You've always been here, waiting for yourself to arrive

Date & Time
Saturday - November 30, 2019 8:00AM to Saturday - November 6, 9999 8:00AM

Cost
Always Available F

Back Register Now



RAMCO Portal

Click on the button **Continue**

What Is Your Nickname? [optional]
Remmy

Nickname [optional]
Super Remmy

This is the Mapped Nickname [optional]
Rem

Back Cancel Continue

4.1.6.1. Add Class Cart and Shop Additional Classes (Optional)

Click on the button **Add Additional Class**

Add Additional Class

Close Wizard Pay by Cash Pay by Check Credit Card

4.1.6.2. Pay and complete class registration.

Click on the appropriate payment option to enter payment details.

Add Additional Class

Close Wizard Pay by Cash Pay by Check Credit Card

Click Continue to progress to the payment summary page.

Payment Amount
100.00

Amount Received
100

Back Cancel Continue



RAMCO Portal

Select the "Print Receipt" button to download a receipt if desired.

Payment Number	Date	Method	Card/Check Number
	06/17/2020	Cash	

Close Print Receipt

Select close to exit the process payment wizard.

6/17/2020 Cash

Print Receipt Close

4.1.7. Take Attendance for a Class

Click on the waffle icon, to expand the list of registrants

Current Registrations

30

Max Attendance

100

+ Waffle Icon

See the records associated with this view.

Waitlisted	Attended...	Class Complet...	Grade	Registration F...
No	Yes			Reg Fee - Stand...
No	Yes			Reg Fee - Stand...

Click on the row selector header to select all registrants

Next Level Buyer's Agent - 3

Class Registration Associated View ▾

+ ADD NEW CLASS REGISTR... BULK DELETE CHART PAI

<input checked="" type="checkbox"/>	Contact ↑	Class	Registration P...	Waitl
	Barnier, Gary	Next Level Buyer's Agent - 3 Day	No	No
	Bates, Pam	Next Level Buyer's Agent - 3 Day	No	No
	Behnke, Emily	Next Level Buyer's Agent - 3 Day	No	No
	Bemis, Cory	Next Level Buyer's Agent - 3 Day	No	No



RAMCO Portal

Then uncheck the box next to those who did not attend, this is to make sure we do not mark these people as attended.

Next Level Buyer's Agent - 3

Class Registration Associated View

+	ADD NEW CLASS REGISTR...		EDIT	✓	ACTIVATE
☑	Contact ↑	Class	Registration P...	Waitl	
✓	Remis, Cory	Next Level Buyer's Agent - 3 Day	No	No	
✓	Remis, Greg	Next Level Buyer's Agent - 3 Day	No	No	
✓	Biehl, Michael	Next Level Buyer's Agent - 3 Day	No	No	

Once you have selected all desired records, choose the "Edit" button to update all selected records at once.

CLASS : RAMCO

Next Level Buyer's Agent - 3



Class Registration Associated View ▾

+ ADD NEW CLASS REGISTR... ✎ EDIT ✓ ACTIVATE


✓ Contact ↑	Class	Enroll	In P...	Waitl
✓ Bemis, Cory	Next Level Buyer's Agent - 3 Day	No		No
✓ Bemis, Greg	Next Level Buyer's Agent - 3 Day	No		No
✓ Bink, Michael	Next Level Buyer's Agent - 3 Day	No		No

Edit
Edit this Class Registration.

Set "Attended" to "Yes"

Level Buyer's	Hide On Portal	<input type="radio"/> No <input type="radio"/> Yes	0 - 0 of 0 (0 s)
Level Buyer's	Registered By	<input type="text"/>	Notes function
Level Buyer's	Authorized By	<input type="text"/>	
Level Buyer's	Class Revenue	<input type="text"/>	
Level Buyer's	ATTENDANCE & RESULTS		
Level Buyer's	Registration Paid	<input type="radio"/> Yes <input type="radio"/> No	
Level Buyer's	Attended *	<input type="radio"/> No <input type="radio"/> Yes	
Level Buyer's	No Showed	<input type="radio"/> No <input type="radio"/> Yes	
Level Buyer's	Class Completion Date	<input type="text"/>  	
Level Buyer's	Grade	<input type="text"/>	
Level Buyer's	WAITLIST		
Level Buyer's	Waitlisted	<input type="radio"/> No <input type="radio"/> Yes	

Click the "Change" then wait for RAMCO to update the records.



Please open the desired Class record, then restart this Assist.

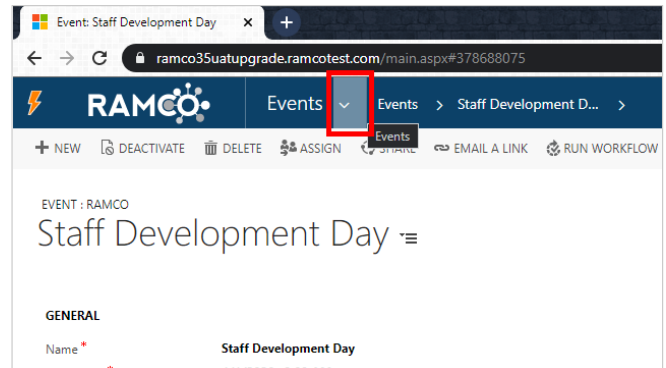


RAMCO Portal

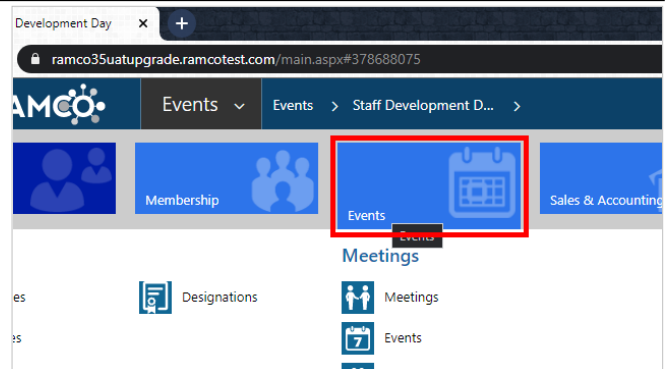
4.2. Meetings

4.2.1. Add a Meeting

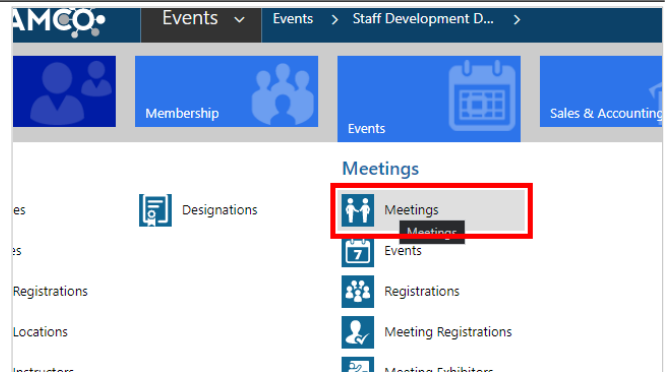
Open the Navigation Areas



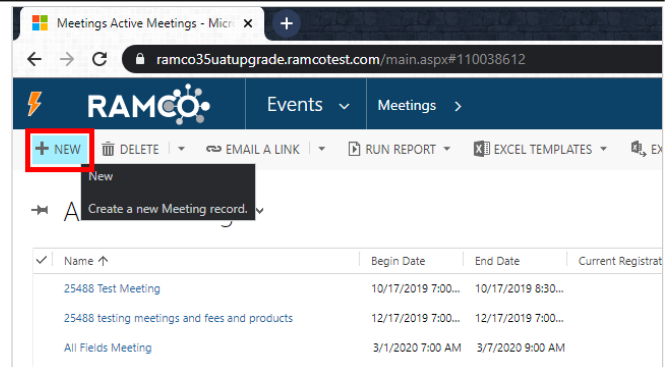
Choose the Events Area



Choose the Meetings entity



Click New to create a new meeting





RAMCO Portal

Give your meeting a name.

MEETING : RAMCO

New Meeting

MEETING SETUP

Name *	<input type="text"/>
Begin Date *	<input type="text"/>
End Date *	<input type="text"/>
Full Day	No
Organizer	--
Order Source	--
Publish to Portal	No

Click on the date field **Begin Date**

New Year's Meeting

MEETING SETUP

Name *	New Year's Meeting
Begin Date *	1/1/2022 12:00 AM
End Date *	1/2/2022 2:30 AM
Full Day	No
Organizer	--
Association *	ST CLOUD AREA ASSOCIATION OF REALTORS
Order Source	--

Choose and begin date and time

New Year's Meeting

MEETING SETUP

Name *	New Year's Meeting
Begin Date *	1/1/2022
End Date *	1/2/2022 2:30 AM
Full Day	No
Organizer	--
Association *	ST CLOUD AREA ASSOCIATION OF REALTORS
Order Source	--

Click on the date field **End Date**

New Year's Meeting

MEETING SETUP

Name *	New Year's Meeting
Begin Date *	1/1/2022
End Date *	1/2/2022 2:30 AM
Full Day	No
Organizer	--
Association *	ST CLOUD AREA ASSOCIATION OF REALTORS
Order Source	--
Publish to Portal	Yes



RAMCO Portal

Choose an end date and time

Years Meeting

ING SETUP

New Year's Meeting

1/1/2022 12:00 AM

1/2/2022 2:30 AM

No

--

ST CLOUD AREA ASSOCIATION OF REALTORS

--

Portal Yes

Click on the toggle field **Publish to Portal**

Name * YPN Mixer

Begin Date * 4/15/2020 5:30 PM

End Date * 4/15/2020 7:30 PM

Full Day No

Organizer --

Order Source --

Publish to Portal No

LOCATION

Location --

Street 1 --

Street 2 --

Enter a location name

Full Day No

Organizer --

Order Source --

Publish to Portal Yes

LOCATION

Location

Street 1 --

Street 2 --

City --

State / Province --

Zip / Postal Code --

Country --

- Enter the address for this location. This will enable the Bing maps location on the portal.
- Enter City
- Enter the State
- Enter the Zip Code
- Click on the country lookup
- Choose United States as the country
- Enter directions to the venue if applicable.

Kansas

12345

United States

--

--

--

--



RAMCO Portal

Click on the date field **Begin Date**

orded --

REGISTRATION SETTINGS

REGISTRATION DATES

Begin Date

End Date

REGISTRATION RULES

Eligible for One Click Registr. ☐ No

Choose a date to allow people to start registering

orded --

REGISTRATION SETTINGS

REGISTRATION DATES

Begin Date

End Date

REGISTRATION RULES

Eligible for One Click Registr. ☐ No

Click on the date field **End Date**

Committee --

REGISTRATION SETTINGS

REGISTRATION DATES

Begin Date

End Date

REGISTRATION RULES

Eligible for One Click Registr. ☐ No

Allow Group Reg ☐ No

Invitation Only ☐ No

Choose a registration cutoff date.

Committee --

REGISTRATION SETTINGS

REGISTRATION DATES

Begin Date

End Date

REGISTRATION RULES

Eligible for One Click Registr. ☐ No

Allow Group Reg ☐ No

Invitation Only ☐ No



RAMCO Portal

Set the max number of attendees for this event.

This does not include their guests

REGISTRATION RULES	
Eligible for One Click Registr	No
Allow Group Reg	No
Invitation Only	No

MAXIMUM CAPACITY	
Max Registrations	--
Max Companions	--

Select to enter data

EDIT/CANCEL REGISTRATION	
Edit Deadline	--
Default Cancellation Fee	--

Set the max number of companions/guests

REGISTRATION RULES	
Eligible for One Click Registr	No
Allow Group Reg	No
Invitation Only	No

MAXIMUM CAPACITY	
Max Registrations	100
Max Companions	--

Select to enter data

EDIT/CANCEL REGISTRATION	
Edit Deadline	--
Default Cancellation Fee	--
Cancellation Refund Deadline	--

Select a cutoff deadline for people to make changes to their registration

REGISTRATION RULES	
Eligible for One Click Registr	No
Allow Group Reg	No
Invitation Only	No

MAXIMUM CAPACITY	
Max Registrations	100
Max Companions	--

Select to enter data

EDIT/CANCEL REGISTRATION	
Edit Deadline	--
Default Cancellation Fee	--
Cancellation Refund Deadline	--

Add a cancellation fee if applicable.

This will be deducted from any automatic refunds when people cancel their registration

REGISTRATION RULES	
Eligible for One Click Registr	No
Allow Group Reg	No
Invitation Only	No

MAXIMUM CAPACITY	
Max Registrations	100
Max Companions	--

Select to enter data

EDIT/CANCEL REGISTRATION	
Edit Deadline	--
Default Cancellation Fee	--
Cancellation Refund Deadline	--



RAMCO Portal

Select a cutoff for automatic refunds when people cancel.

Set a preview summary for this meeting.

Enter a detailed meeting description if applicable.

Click save to complete the process.

This creates your meeting, but people will not be able to sign up for this meeting without a registration fee.

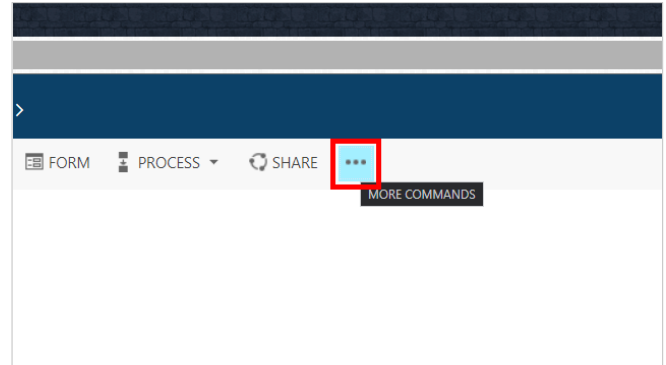
If you want help creating a registration fee, try using the assist called "Create a meeting registration fee"



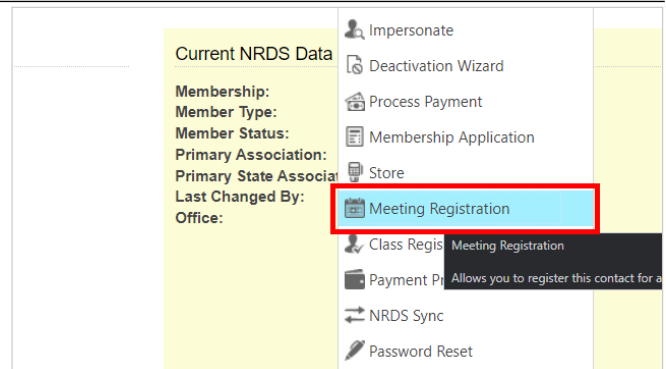
RAMCO Portal

4.2.2. Modify a Preexisting Meeting Registration

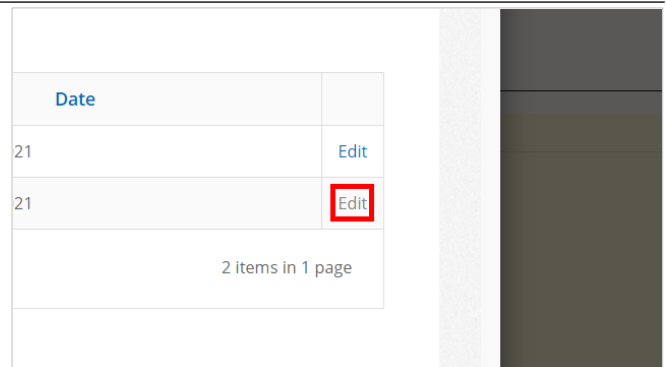
Click on the command button **MORE COMMANDS**



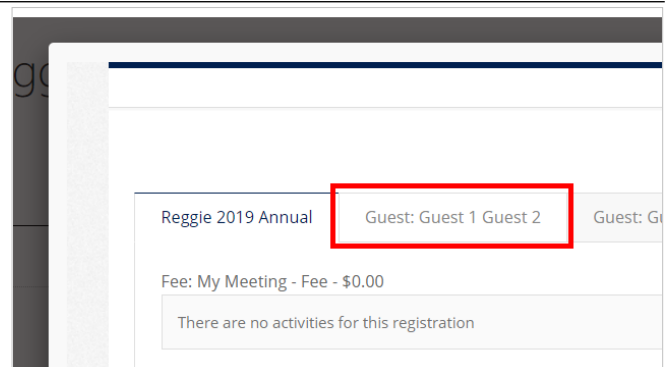
Choose the Meeting Registration wizard



Choose "Edit" next to the meeting registration



To update guest information, choose a guest tab.





RAMCO Portal

Then choose Update Name

Reggie 2019 Annual Guest: Guest 1 Guest 2 Guest: Gu

Fee: Guest - \$30.00

There are no activities for this registration

Cancel Registration Update Name

Previous Balance: \$0.00

Price Change: \$0.00

Make the necessary changes to the guest name

My Meeting

First Name

Guest 1

Last Name

Guest 2

Back

Click continue to proceed. Repeat this for each guest that needs updating.

First Name

Guest 1

Last Name

Guest 2

Back Continue

If you wish to cancel this meeting registration, choose "Cancel Registration"

Reggie 2019 Annual Guest: Guest 1

Fee: Guest - \$30.00

There are no activities for this registration

Cancel Registration Update Name

Previous Balance: \$0.00

Price Change: \$0.00



RAMCO Portal

If you wish to add more guests, choose "Register Guests"

Previous Balance: \$0.00
Price Change: (\$30.00)
Net Balance: (\$30.00)

Choose a guest fee to register the guest

My Meeting

> Guests

Registration Fee
☐ Guest (\$30.00)

First Name

Last Name

Then enter the guest's name

> Guests

Registration Fee
☒ Guest (\$30.00)

First Name

Last Name

Click continue to proceed.

First Name

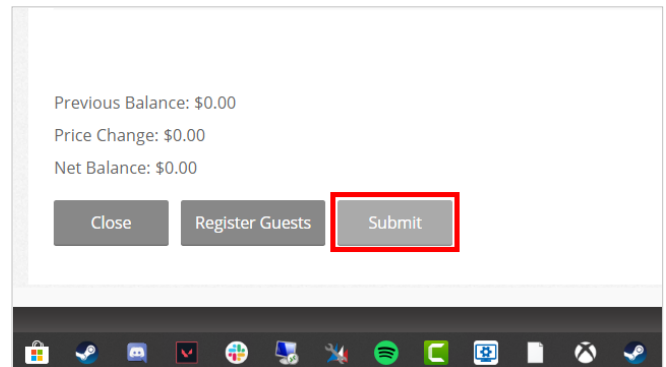
Last Name

Company Name

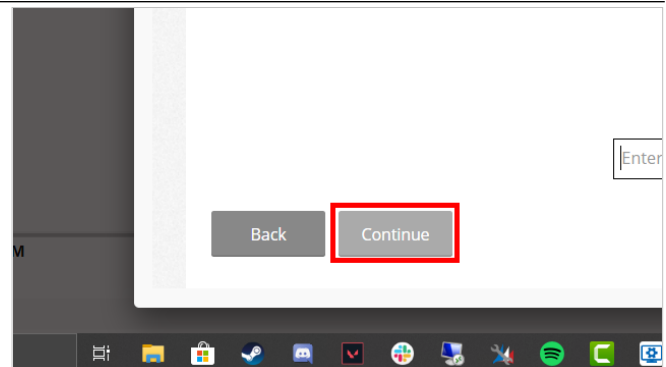


RAMCO Portal

Click on the button **Submit**



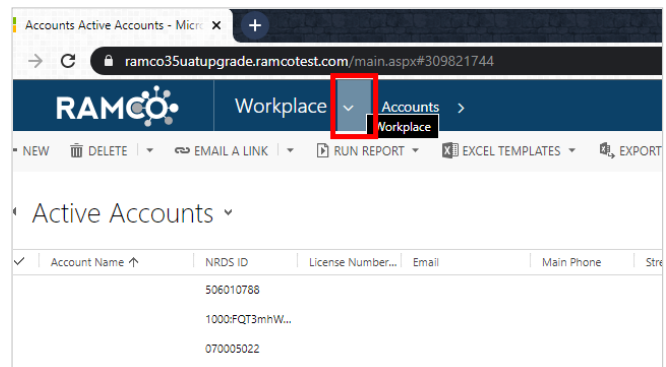
Click continue to complete the process and checkout.



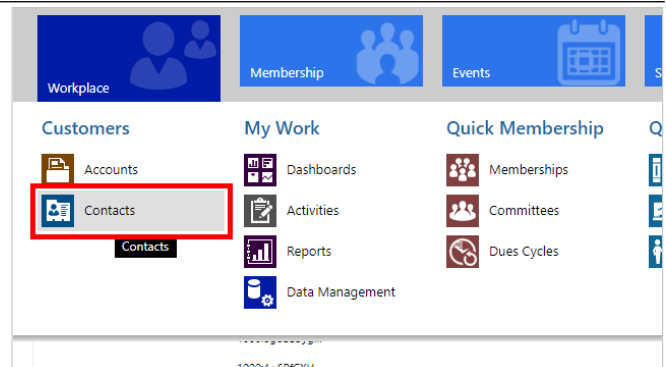
Please restart this assist from a contact record.

4.2.3. Registering for a Meeting

Open the Navigation Areas



Click on the "Contacts" entity.





RAMCO Portal

Use the search box to search for your contact.

Select the contact to register for a meeting.

✓	Last Name ↑	First Name ↑	NRDS ID	Username	Parent Customer	Primary
✓	Ramco	Remmy			Remmy's Realty	

Click on the command button **MORE COMMANDS**

Click on the command button **Meeting Registration**



RAMCO Portal

Select a meeting to register for.

Available Meetings

	Name
<input type="radio"/>	MikeC - Example Meeting 02
<input checked="" type="radio"/>	My Meeting

Click the "Select Meeting" button to view meeting details.

	Name	
<input type="radio"/>	MikeC - Example Meeting 02	09/30/2020
<input checked="" type="radio"/>	My Meeting	01/01/2021

Click on the button **Register Now!**

Activity	Activity	03/03/2020 8:00 AM	03/03/2020 8:00 AM
Annie's Meeting Activity	Activity	03/03/2020 8:00 AM	03/03/2020 8:00 AM
Annie's Meeting Session	Session	03/04/2020 8:00 AM	03/04/2020 8:00 AM
Annie's Class #1	Class	03/04/2020 2:00 PM	03/04/2020 2:00 PM
Class for New Members	Class	03/05/2020 8:00 AM	03/05/2020 8:00 AM
Racing Test Class	Class	06/10/2020 8:00 AM	06/30/2020 8:00 AM

If your meeting allows for group registration. You must select a registration type.

Annual, Regg

☒ I am registering myself only.

☐ I would like to register myself and

☐ I do not want to register for the ev



RAMCO Portal

Click on the button **Continue**

A dialog box with a white background and a grey border. It contains three radio button options: "I am registering myself only." (selected), "I would like to register myself and others.", and "I do not want to register for the event, but I would like to register others." Below the options are two buttons: "Cancel" and "Continue". The "Continue" button is highlighted with a red rectangular border.

If your meeting allows for guests, you must choose whether you will register guests along with your attendee. If you have guests to register, select the guest registrations check box.

A dialog box with a white background and a grey border. It contains a checkbox labeled "Guest Registrations - \$30.00". Below the checkbox are three buttons: "Back", "Cancel", and "Continue". The "Continue" button is highlighted with a red rectangular border.

Then select the number of guests field.

A dialog box with a white background and a grey border. It contains a text input field labeled "# of Guests". Below the field is a "Continue" button. The input field is highlighted with a red rectangular border.

Enter the number guests to be registered.

A dialog box with a white background and a grey border. It contains a text input field labeled "# of Guests" with the number "2" entered. Below the field is a "Continue" button. The input field is highlighted with a red rectangular border.



RAMCO Portal

Click on the button **Continue**

☒ Guest Registrations - \$30.00

2

Back Cancel Continue

1. Enter a First Name
2. Enter a Last Name
3. Enter a Badge Name

First Name

Badge Name

Last Name

Company Name (optional)

Click on the button **Continue**

Manage...

Last Name

Company Name

Back Cancel Continue

Select a meeting registration fee.

Annual, Regg

☒ Immediate Past President Registration

☐ Mike's Meeting Reg Fee - \$0.00

☐ Mike's Table Registration - \$150.00

Cancel Continue

Click on the button **Continue**

☒ Immediate Past President Registration - \$0.00

☐ Mike's Meeting Reg Fee - \$0.00

☐ Mike's Table Registration - \$150.00

Cancel Continue



RAMCO Portal

Guests may also attend the activities and sessions a part of the meeting.

If the guest should be registered for these activities as will, simply check the box next to each guest name.

A screenshot of the RAMCO Portal registration page. The page displays a list of activities for Tuesday - March 3, 2020. Under the heading "Annie's Meeting Activity", there is a checkbox next to the text "Attendee (Ramco, Remmy) - \$7.00". The checkbox is highlighted with a red rectangle. Below the list are three buttons: "Back", "Cancel", and "Continue".

Click on the button **Continue Registration**

A screenshot of the RAMCO Portal registration page. The page displays a form with a text input field labeled "Enter your Coupon Code". Below the input field are three buttons: "Back", "Cancel", and "Continue Registration". The "Continue Registration" button is highlighted with a red rectangle.

Select the appropriate payment method. Then enter the payment details.

A screenshot of the RAMCO Portal payment page. The page displays a form with three buttons: "Close Wizard", "Pay by Cash", and "Pay by Check". The "Pay by Cash" button is highlighted with a red rectangle. Below these buttons is a "Credit Card" button.

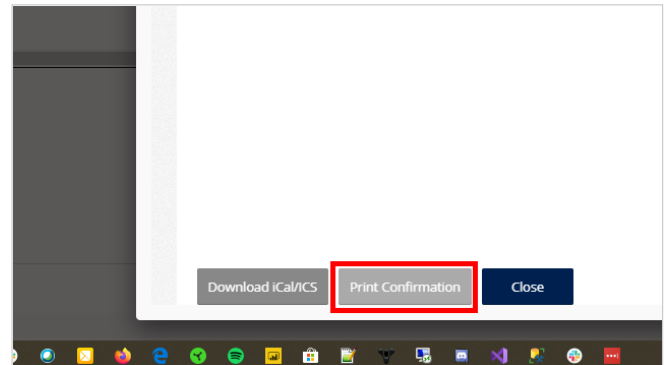
Click continue to progress to the payment summary page.

A screenshot of the RAMCO Portal payment summary page. The page displays a form with two input fields: "Payment Amount" with the value "17.00" and "Amount Received" with the value "20". Below the input fields are three buttons: "Back", "Cancel", and "Continue". The "Continue" button is highlighted with a red rectangle.



RAMCO Portal

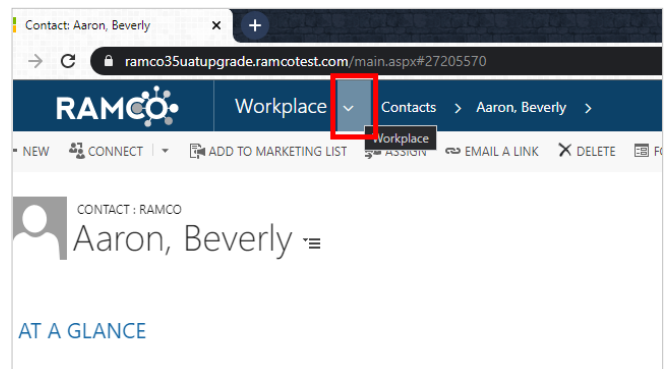
Once the process is complete you may print a confirmation.



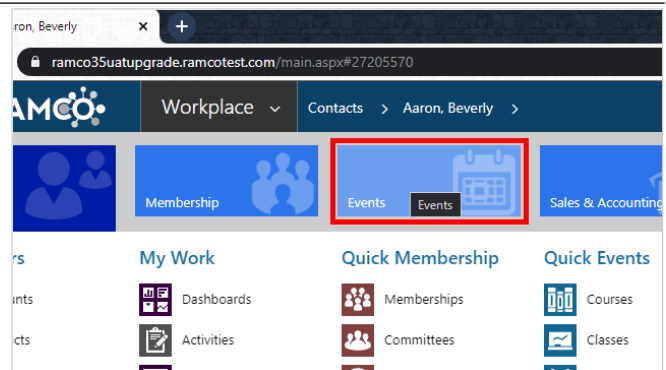
4.3. Calendar Events (Announcements)

4.3.1. Create a Calendar Event That Cannot Be Registered For

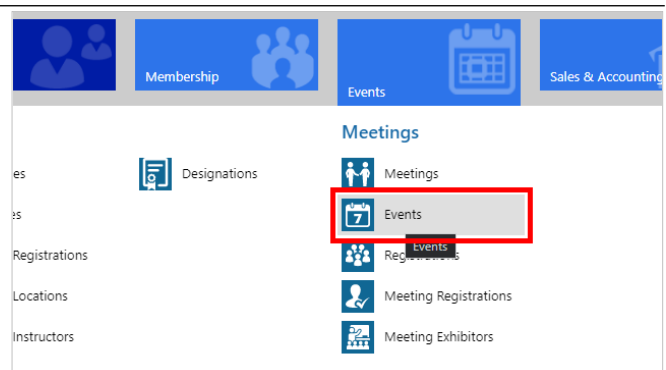
Open the Navigation Areas



Click on the navigation area **Events**



Click on the "Events" entity.





RAMCO Portal

Click on the command button **New**

Click on the field **Name**

Enter the name of the event.

1. Enter a begin date and time.
2. Enter an end date and time.
3. Enter a location
4. Click on the toggle field **Publish to Portal**



RAMCO Portal

Enter a preview summary.

A screenshot of the RAMCO Portal form. The form has a dark blue header bar. Below the header, there is a large white area for the main content. On the right side of this area, there is a smaller white box containing the text "PREVIEW SUMMARY" and a red square icon. Below this box, there is a text input field with the letter "Q" entered. Further down, there is a section labeled "DETAILED DESCRIPTION" with a rich text editor toolbar containing various icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and text color.

Enter a description.

A screenshot of the RAMCO Portal form, identical to the one above. It shows the "PREVIEW SUMMARY" field with a red square icon and the letter "Q" entered. The "DETAILED DESCRIPTION" section is also visible with its rich text editor toolbar.

Click the save icon to complete.

A screenshot of the RAMCO Portal form showing the bottom section. It includes a table with two columns: "Status" and "Reason". The first row shows "Active" and "Active". Below the table, there is a "Save" button highlighted with a red box. The bottom of the screen shows a Windows taskbar with the date and time "2:48 PM 3/26/2020" and a "Save" button.



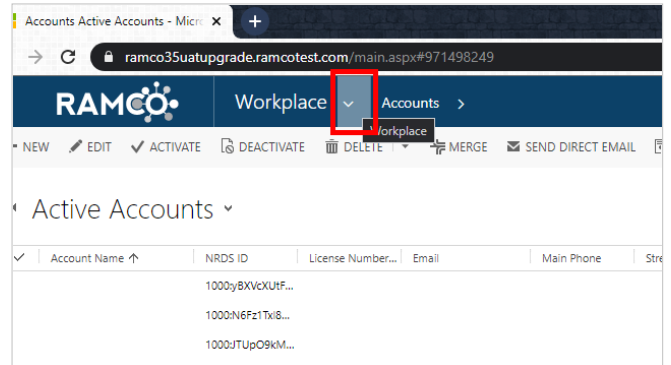
RAMCO Portal

5. Committees and Elections

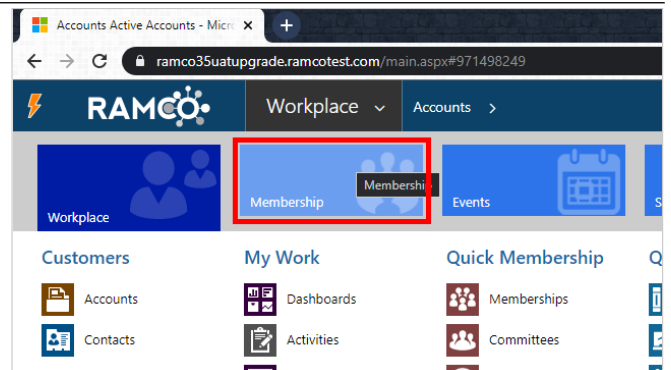
5.1. Committees

5.1.1. Create a Committee

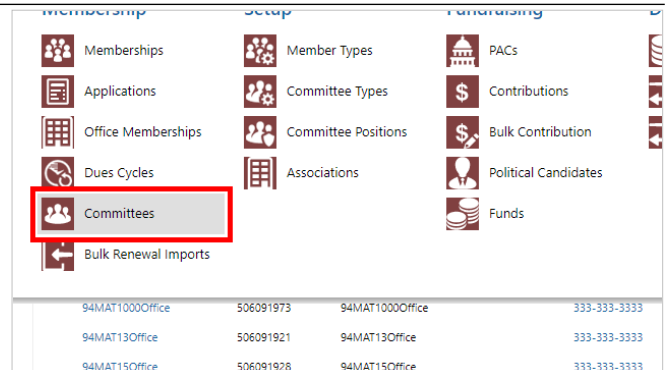
Open the navigation areas



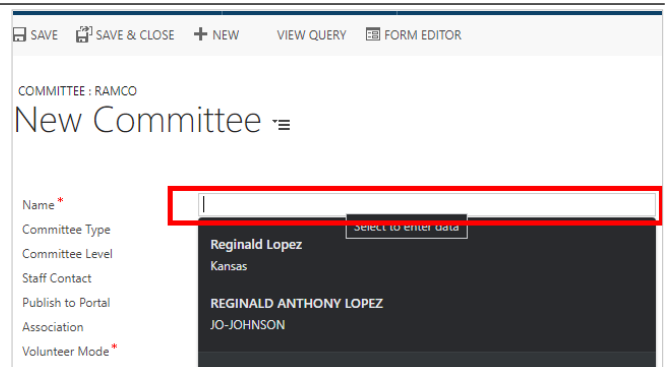
Click on the navigation area **Membership**



Click on the "Committees" entity.



Click on the field name





RAMCO Portal

Enter the Committee's Name.

COMMITTEE : RAMCO

New Committee

Name *

Committee Type

Committee Level

Staff Contact

Publish to Portal

Association

Volunteer Mode *

System Query

Management addresses

Lookup and select the appropriate committee type. Committee types are used to categorize committees. For example, a standing committee versus a task force.

COMMITTEE : RAMCO

New Committee

Name *

Committee Type

Committee Level

Staff Contact

Publish to Portal

Association

Volunteer Mode *

System Query

Management Form

Committee Name

Standing Committee

Look Up Standing Committee

1 result

+ New

Click on the search button of field **Staff Contact**

COMMITTEE : RAMCO

New Committee

Name *

Committee Type

Committee Level

Staff Contact

Publish to Portal

Association

Volunteer Mode *

System Query

Management Form

Committee Memberships Sub-Grid (Committee)

Search for records

Name ↑

To enable this content, create the record.

Lookup the user record for the committee's staff liaison.

COMMITTEE : RAMCO

New Committee

Name *

Committee Type

Committee Level

Staff Contact

Publish to Portal

Association

Volunteer Mode *

System Query

Management Form

Committee Memberships Sub-Grid (Committee)

Search for records

Name ↑

To enable this content, create the record.

Cutlip, Mike

Dohm, Thomas

Fox, Thom

Jackson, Phelicia

Last name, First name

Lopez, Reggie

McCormick, Don

8 results

+ New



RAMCO Portal

Select "Yes" on the field "Publish to Portal" if you wish to make this committee and it's members visible to those on the portal.

COMMITTEE: RAMCO

New Committee

Name *	Committee Name
Committee Type	Standing Committee
Committee Level	--
Staff Contact	Lopez, Reggie
Publish to Portal	No
Association	--
Volunteer Mode *	No
System Query	--
Nomination Form	--

Click on the lookup **Association**

Name *	Committee Name
Committee Type	Standing Committee
Committee Level	--
Staff Contact	Lopez, Reggie
Publish to Portal	Yes
Association	--
Volunteer Mode *	--
System Query	--
Nomination Form	--

Description

Search for the association record this committee belongs to.

Name *	Committee Name
Committee Type	Standing Committee
Committee Level	--
Staff Contact	Lopez, Reggie
Publish to Portal	Yes
Association	--
Volunteer Mode *	--
System Query	--
Nomination Form	--

Description

Use the field "Volunteer Mode" to control whether the committee is closed or open for nomination.

Name *	Committee Name
Committee Type	Standing Committee
Committee Level	--
Staff Contact	Lopez, Reggie
Publish to Portal	Yes
Association	NATIONAL ASSOCIATION OF REALTORS®
Volunteer Mode *	Open for Nomination
System Query	Open for Joining
Nomination Form	Closed

Description



RAMCO Portal

Enter a committee description.

Committee Name
Standing Committee

Committee Type
--

Committee Level
--

Off Contact
Lopez, Reggie

Publish to Portal
Yes

Association
NATIONAL ASSOCIATION OF REALTORS®

Volunteer Mode
Closed

Item Query
--

Election Form

Enter a committee mission statement.

Committee Name
Standing Committee

Committee Type
--

Committee Level
--

Off Contact
Lopez, Reggie

Publish to Portal
Yes

Association
NATIONAL ASSOCIATION OF REALTORS®

Volunteer Mode
Closed

Item Query
--

Election Form

Click on the command button **Save**

Committee: New Committee

ramco35uatupgrade.ramcotest.com/main.aspx#307199379

RAMCO Membership Committees New Committee

SAVE SAVE & CLOSE NEW VIEW QUERY FORM EDITOR

COMMITTEE : RAMCO

New Committee

Name * Committee Name

Committee Type Standing Committee

Committee Level --

5.1.2. Create Meeting from Committee Wizard

Open Navigation Areas

Contact: Ramco, Remmy

https://ramcosandboxisv.ramco.com

ramcosandbox.ramcoams.org/main.aspx#980195191

RAMCO Workplace Contacts Ramco, Remmy

NEW CONNECT ADD TO MARKETING LIST Workplace EMAIL A LINK DELETE

CONTACT : RAMCO

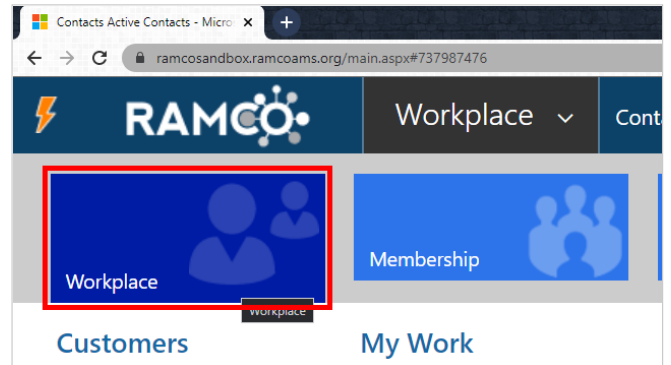
Ramco, Remmy

AT A GLANCE

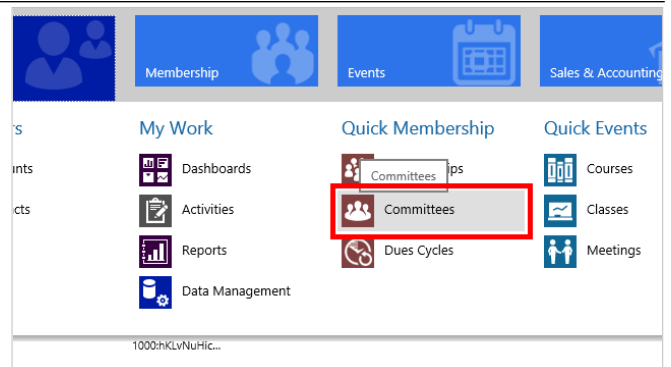


RAMCO Portal

Click on the navigation area **Workplace**



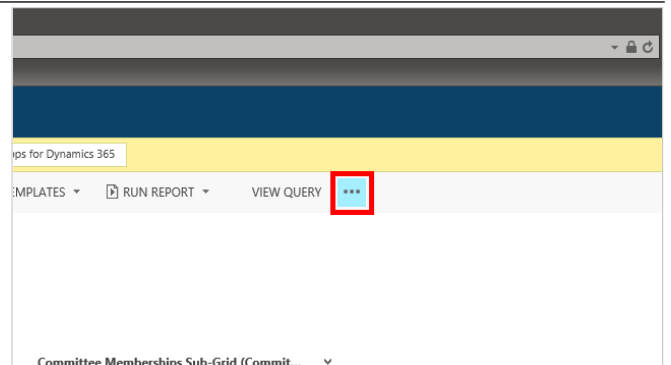
Click on the link **Committees**



Select a committee to create a meeting from.

✓ Name ↑	Committee Type	Staff Contact	Publis
Closed Committee		Last name, First name	Yes
Committee Scale Test		Cutlip, Mike	No
Maddie's Test Committee			No
MikeC - Technology Committee - Open for Nomination	Standing Committee	Cutlip, Mike	Yes
Open for Joining Committee		Last name, First name	Yes
Reggie's 3.5 Sprint 4 Committee	Standing Committee	Lopez, Reggie	Yes
Savva's test committee		Last name, First name	Yes
Varun's Free for All Committee			Yes
Varun's RAMCO 3.5 Committee			Yes
Varun's Sprint Committee			Yes

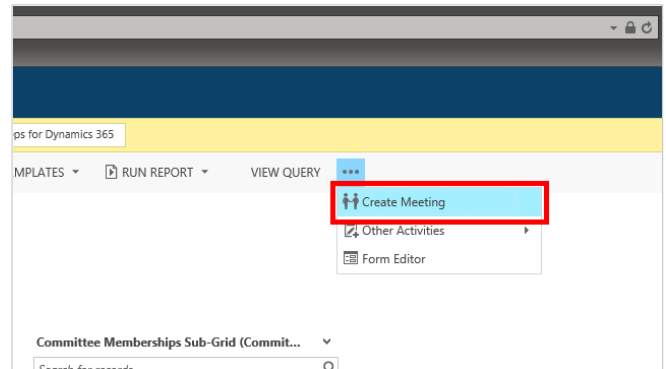
Click on the item **MORE COMMANDS**



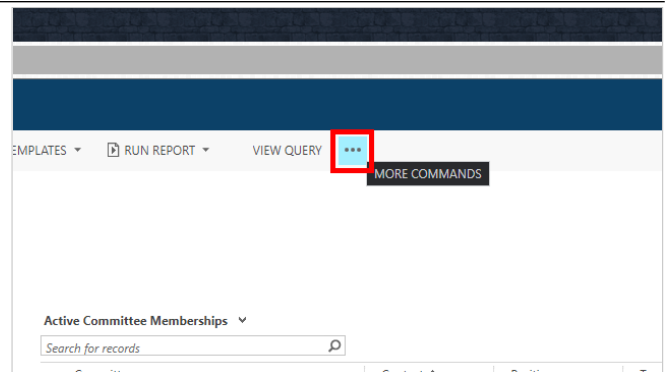


RAMCO Portal

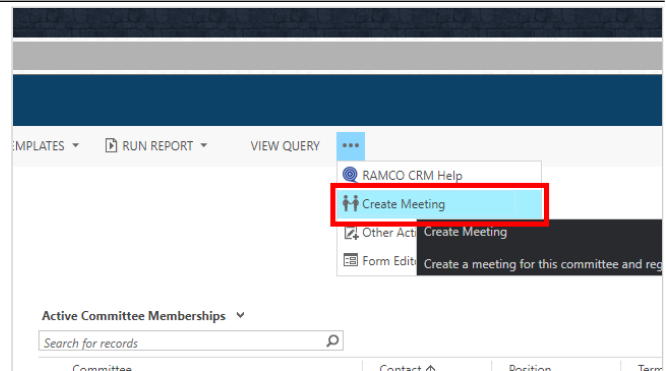
Select the "Create Meeting" wizard option.



Click on the command button **MORE COMMANDS**



Click on the command button **Create Meeting**



1. Add meeting name
2. Add meeting location



RAMCO Portal

Enter directions to the meeting location, if desired.

Street Address 2 [optional]
Zip Code [optional]
City [optional]
Directions [optional]
Start Date
End Date

The screenshot shows a web form with several input fields. The 'Directions' field is highlighted with a red border. The 'Start Date' and 'End Date' fields are also visible.

1. Enter meeting start date and time as well as end date and time.
2. Select start time field.
3. Click on the end time field.

City [optional]
Country [optional]
Directions [optional]
Start Date
End Date
Start Time (24:00 format)
End Time (24:00 format)
Description

The screenshot shows a modal window for selecting meeting details. The 'Start Date', 'End Date', 'Start Time', and 'End Time' fields are highlighted with red borders. The 'Description' field is also visible.

Enter a meeting description

Start Date
End Date
Start Time (24:00 format)
End Time (24:00 format)
Description
Cancel
Continue

The screenshot shows the same modal window as before, but now the 'Description' field is highlighted with a red border. The 'Start Date', 'End Date', 'Start Time', and 'End Time' fields are also visible.

Click continue to view summary page.

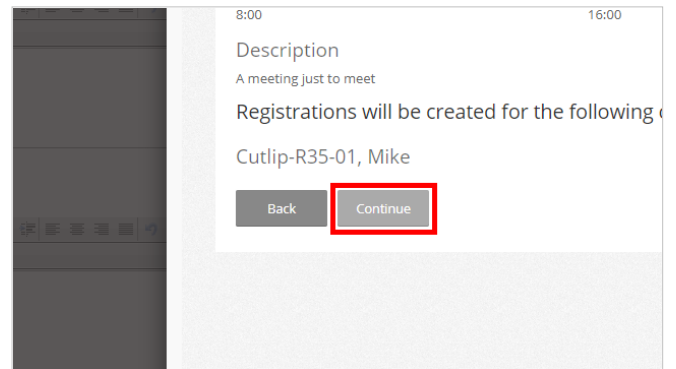
08:00
16:00
Description
A meeting just to meet
Cancel
Continue

The screenshot shows the same modal window as before, but now the 'Continue' button is highlighted with a red border. The 'Description' field contains the text 'A meeting just to meet'.

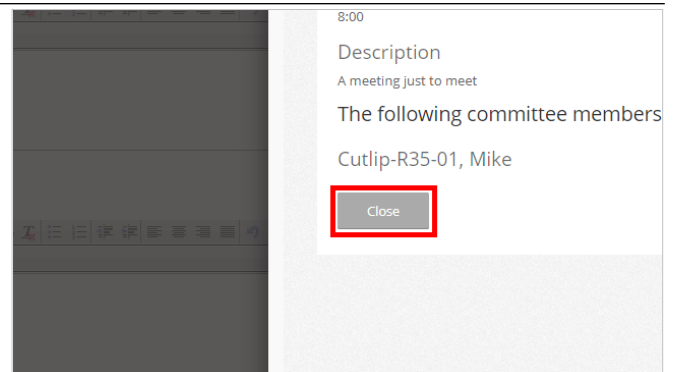


RAMCO Portal

After reviewing your meeting summary, click continue to submit your meeting.

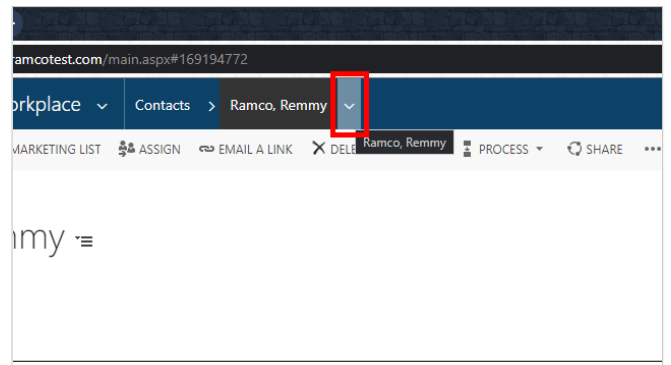


Click close to exit the wizard.

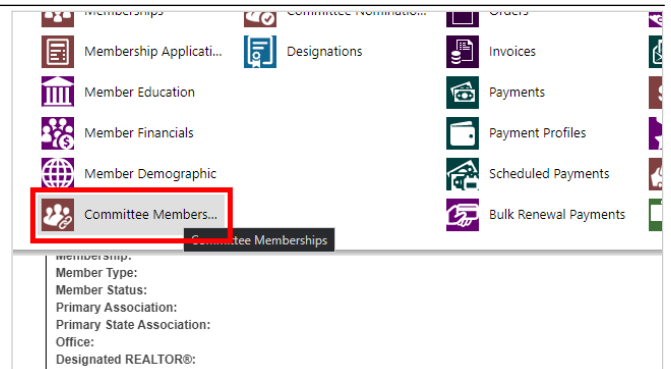


5.1.3. Add Contact to a Committee

Open the "View Related" tab on the contact's record.



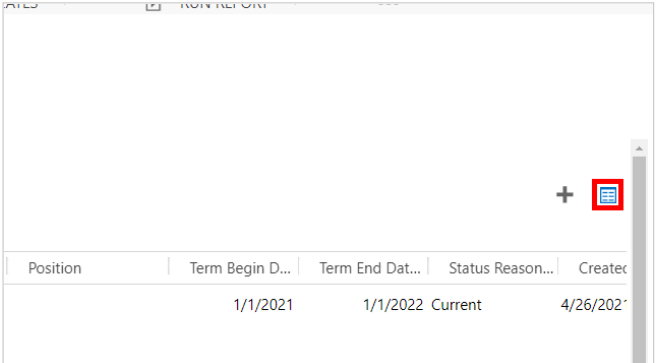
Click on the "Committee Memberships" entity.





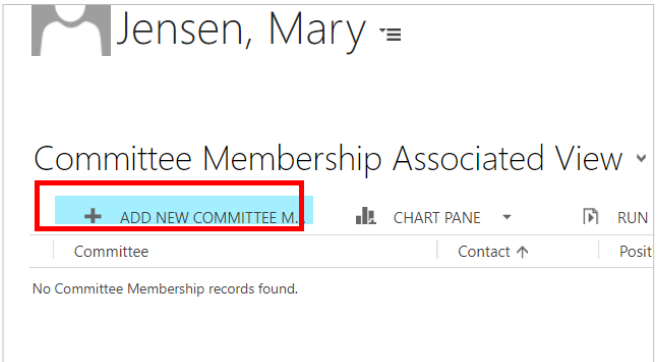
RAMCO Portal

Click on the Waffle to Expand the view of Committee Memberships



Position	Term Begin D...	Term End Dat...	Status Reason...	Create...
	1/1/2021	1/1/2022	Current	4/26/2021

Click on the command button **Add New Committee Membership**



Jensen, Mary

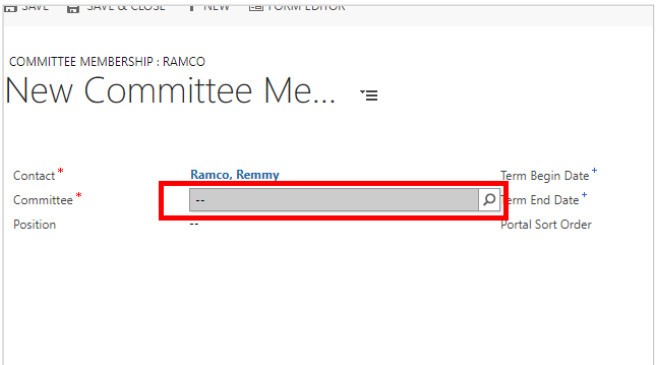
Committee Membership Associated View

+ ADD NEW COMMITTEE M. CHART PANE RUN

Committee Contact Posit

No Committee Membership records found.

Search for the committee



COMMITTEE MEMBERSHIP : RAMCO

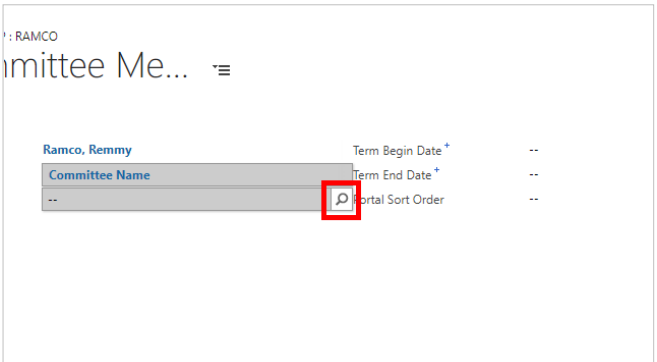
New Committee Me...

Contact * Ramco, Remmy Term Begin Date +

Committee * -- Term End Date +

Position -- Portal Sort Order

Set the position



COMMITTEE MEMBERSHIP : RAMCO

Committee Me...

Ramco, Remmy Term Begin Date +

Committee Name Term End Date +

-- Portal Sort Order



RAMCO Portal

Select the appropriate position for this committee member.

COMMITTEE MEMBERSHIP : RAMCO

New Committee Me...

Contact*
Committee*
Position

Ramco, Remmy
Committee Name

Chair Active	9/11/2019 10:54 AM
Member Active	9/11/2019 10:55 AM
Vice-Chair Active	9/11/2019 10:55 AM

Look Up More Records

3 results + New

Set a Term Begin Date.

RAMCO will automatically move this member from pending to current on the date listed here.

Term Begin Date*
Term End Date*
Portal Sort Order

Set the Term End Date.

RAMCO will automatically expire this committee membership on the date listed here.

Term Begin Date*
Term End Date*
Portal Sort Order

Click Save & Close to complete the process.

Workplace v Contacts

RAMCO

SAVE SAVE & CLOSE + NEW FORM EDITOR

Save and close this Committee Membership.

New Committee Me...

Contact*
Committee*

Ramco, Remmy
Committee Name

Please restart this assist from a contact record.



RAMCO Portal

5.1.4. Approve Committee Nomination

Select the Committee Nomination record to be approved.

Committee Nominations Sub-Grid (Commit...

Search for records

Status Reason...	Name ↑
Pending	Ramco, Remmy - Committee Nam...

Modified On: 2/26/2020 1:26 PM

Click on the command button **Run Workflow**

Committee Nomination: Ramco

ramco35uatupgrade.ramcotest.com/main.aspx#845860700

RAMCO Workplace Committees > Ramco, Remmy - Co...

NEW DEACTIVATE DELETE EMAIL A LINK **RUN WORKFLOW** START DIALOG WORD TE

Run Workflow

Run a workflow for this Committee Nomination

View the status of workflows in the Workflow

Committee Nomination: RAMCO

Ramco, Remmy

Committee Name

Nomination Form Response

Select the "Approve Nomination" workflow

Enter your search criteria.

Look for: Process

Look in: On Demand Workflows

Search:

Process Name	Category
Approve Nomination	Workflow

Click on the button **Add**

1 - 1 of 1 (1 selected)

Page 1

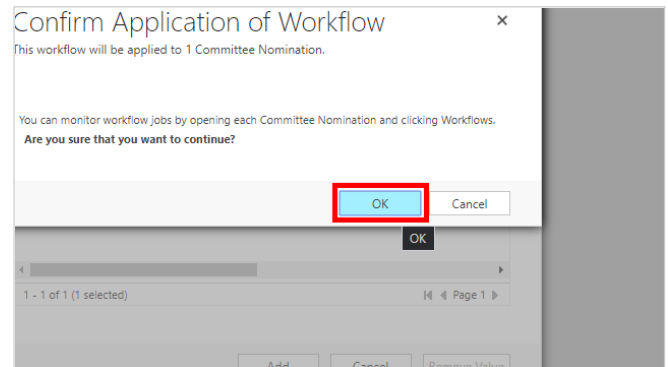
Add Cancel Remove Value

Modified On: 2/26/2020 1:43 PM



RAMCO Portal

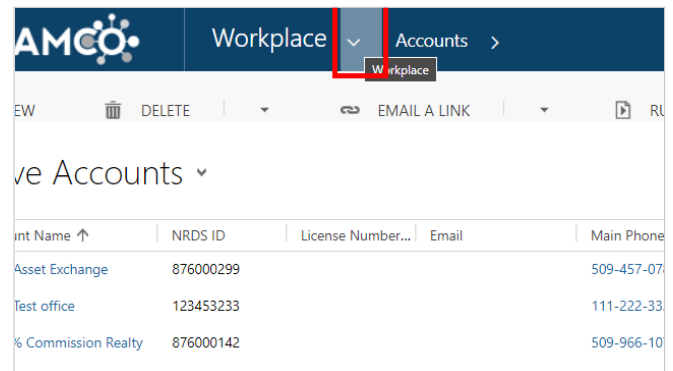
Click on the button **OK**



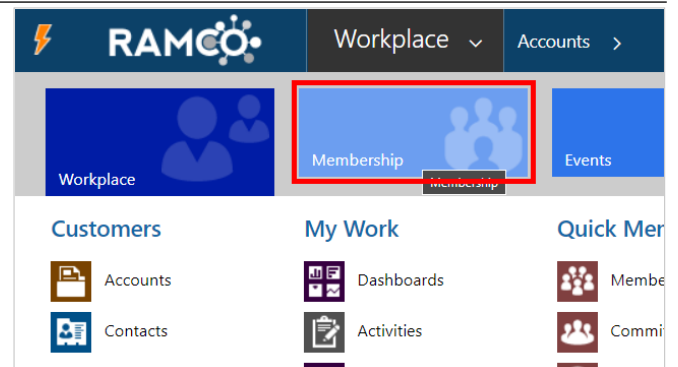
Please restart this assist from a committee record.

5.1.5. Update Committee Terms in Bulk

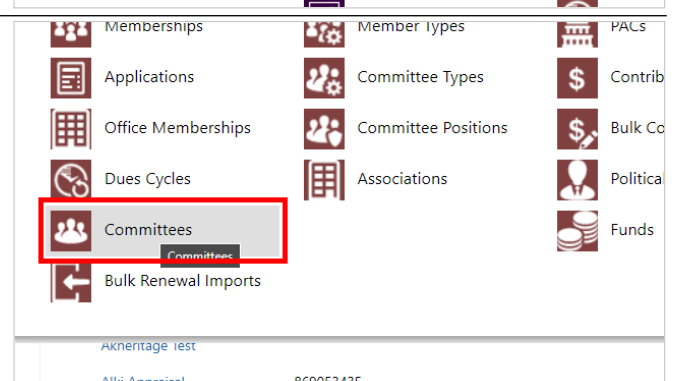
Open the Navigation areas



Choose the Membership area



Choose Committees





RAMCO Portal

Open a committee to update

Active Committees ▾

✓	Name ↑	Committee Type	Staff C
	[Test] Finance Committee		Lopez,
✓	2021 Board of Directors	Standing	Cutlip,
	Annual Awards		
	Board of Directors	Standing	
	Board of Directors (Nominations)	Standing	
	CIC	Standing	Cronk,
	Global Business Alliance Committee	Standing	Last na
	Group Committee	Standing	Use 1

click the waffle to expand the view of committee memberships

See the records associated with this view.

Position	Term Begin D...	Term End Dat...	Status Reason...	Created
Chair	2/1/2021	11/1/2021	Current	2/8/2021 :
Member	1/1/2021	1/1/2022	Pending	12/9/2020

Check this arrow box to select all committee memberships.

if you only wish to edit some committee memberships, check those records one by one.

Board of Directors ≡

Committee Membership Associated View ▾

+ ADD NEW COMMITTEE M... BULK DELETE CHART PA...

✓	Committee	Contact ↑	Positi
	Select/clear all records on this page	Cutlip-R35-01, Mike	
	Board of Directors	Cutlip-Stage06, Mike	Chair
	Board of Directors	McCormick-Sandbo...	Membe
	Board of Directors	McCormick-Sandbo...	Membe

Once all your committee memberships have been selected click edit.

COMMITTEE : RAMCO

Board of Directors ≡

Committee Membership Associated View ▾

+ ADD NEW COMMITTEE M... EDIT ACTIVATE

☑	Committee		Positi
	Board of Directors	Cutlip-R35-01, Mike	
✓	Board of Directors	Cutlip-Stage06, Mike	Chair
✓	Board of Directors	McCormick-Sandbo...	Membe



RAMCO Portal

Now you can choose a Term Begin Date that will be applied to all selected committee memberships

A screenshot of the RAMCO Portal interface. A dropdown menu is open, showing a calendar icon and a 'Select date' button. The dropdown is highlighted with a red box.

Now you can choose a Term End Date that will be applied to all selected committee memberships

A screenshot of the RAMCO Portal interface. The 'Term Begin Date' and 'Term End Date' fields are highlighted with red boxes. The 'Term Begin Date' field has a calendar icon and a 'Select date' button. The 'Term End Date' field has a calendar icon and a 'Select date' button.

Clicking changing will trigger all selected records to be updated.

A screenshot of the RAMCO Portal interface. A 'Change' button is highlighted with a red box. Below the button, there is a table with columns for 'Status' and 'Status Reason'. The 'Status' column shows 'Active' and the 'Status Reason' column shows 'Active'.

5.2. Elections

5.2.1. Create an Election

Open the Navigation Areas

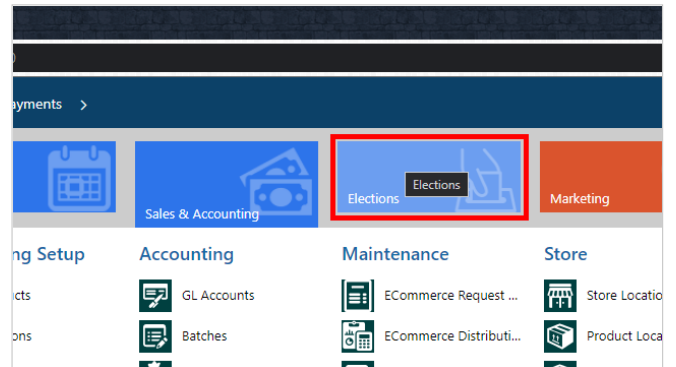
A screenshot of the RAMCO Portal interface. The 'Sales & Accounting' navigation area is highlighted with a red box. Below it, there is a table with columns for 'Applied Amount' and 'Created On'. The table contains three rows of data.

	Applied Amount	Created On
2167-G3P3Q6 - Amundson, Kathleen - \$580.00	\$555.00	3/19/2020 2:49 PM
2171-J753K1 - Achenbach, Karl - \$580.00	\$555.00	3/19/2020 2:35 PM
2562-B3W9Y1 - Cutlip-R35-02, Mike - \$5.00	\$2.00	3/18/2020 2:52 PM

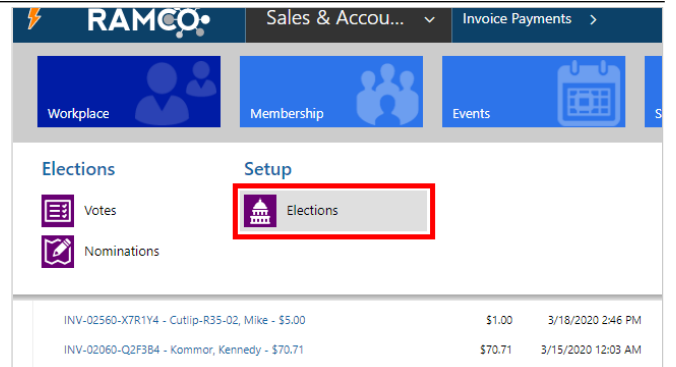


RAMCO Portal

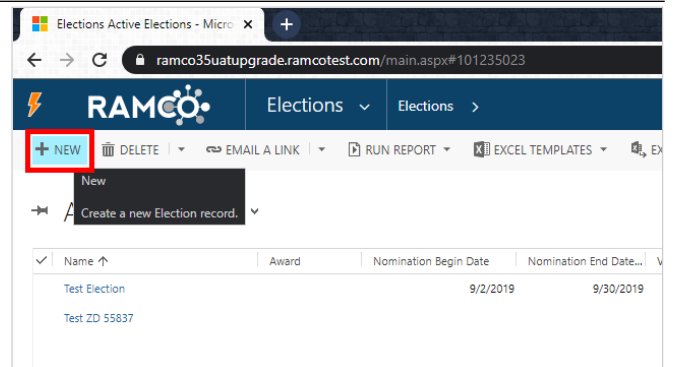
Choose the elections area



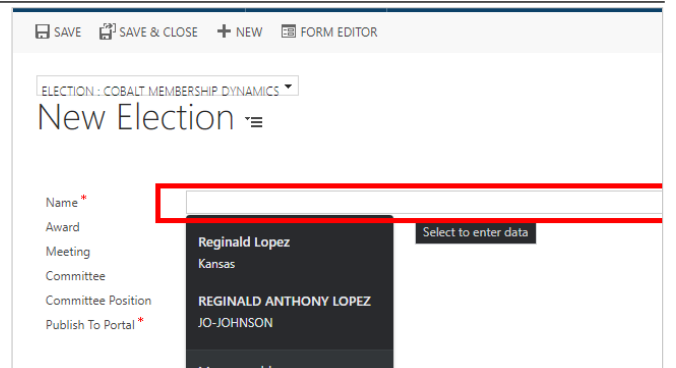
Click on the link **Elections**



Click on the command button **New**



Enter a name for the election. This is member facing.





RAMCO Portal

Click on the date field **Nomination Begin Date**

The screenshot shows a form with the following fields: **tee** (dropdown), **tee Position** (dropdown), **To Portal *** (radio button, selected), **ON DATES** (section header), **tion Begin Date** (text field, highlighted with a red box), **tion End Date** (text field), **egin Date** (text field), **nd Date** (text field), and **IATIONS** (section header). The **tion Begin Date** field is highlighted with a red box, and a dropdown menu is open below it, showing the text "Select to enter data".

Enter a date and time when Nominations will begin.

If this election will not allow nominations, leave this field blank.

The screenshot shows a form with the following fields: **tee** (dropdown), **tee Position** (dropdown), **To Portal *** (radio button, selected), **ON DATES** (section header), **tion Begin Date** (text field), **tion End Date** (text field, highlighted with a red box), **egin Date** (text field), **nd Date** (text field), and **IATIONS** (section header). The **tion End Date** field is highlighted with a red box, and a dropdown menu is open below it, showing the text "Select to enter data".

Click on the date field **Nomination End Date**

The screenshot shows a form with the following fields: **tee** (dropdown), **tee Position** (dropdown), **To Portal *** (radio button, selected), **ON DATES** (section header), **tion Begin Date** (text field), **tion End Date** (text field, highlighted with a red box), **egin Date** (text field), **nd Date** (text field), and **IATIONS** (section header). The **tion End Date** field is highlighted with a red box, and a dropdown menu is open below it, showing the text "Select to enter data".

Enter a date and time when Nominations will end.

If this election will not allow nominations, leave this field blank.

The screenshot shows a form with the following fields: **tee** (dropdown), **tee Position** (dropdown), **To Portal *** (radio button, selected), **ON DATES** (section header), **tion Begin Date** (text field), **tion End Date** (text field, highlighted with a red box), **egin Date** (text field), **nd Date** (text field), and **IATIONS** (section header). The **tion End Date** field is highlighted with a red box, and a dropdown menu is open below it, showing the text "Select to enter data".




RAMCO Portal

Choose a begin date and time for voting.

[illegible]

Choose an End date and time for voting.

CANDIDATES	
<div><div>SELECT TO ENTER DATA</div><div>▼</div></div>	<div>Select to enter data </div> <div>To enable this content, create the record.</div>

Click on the field **Max Number of Nominations**

Voting End Date	5/31/2020
NOMINATIONS	
Multiple Nominees Allowed	No
Write In Nomination *	No
Self Nominations Allowed *	No
Max Number of Nominations	--
Nomination Form	--
Display Candidate Name *	No
VOTING	
Voting Scale	--

Set the max number of nominations per person (if applicable)

Voting End Date	5/31/2020
NOMINATIONS	
Multiple Nominees Allowed	No
Write In Nomination *	No
Self Nominations Allowed *	No
Max Number of Nominations	1
Nomination Form	--
Display Candidate Name *	No
VOTING	
Voting Scale	--



RAMCO Portal

Choose whether to display candidate nominations.

NOMINATIONS	
Multiple Nominees AI	No
Write In Nominator *	No
Self Nominations AI *	No
Max Number of Nomi	1
Nomination Form	--
Display Candidate h	No

VOTING	
Voting Scale	--
Voting Scale Minimum	--
Voting Scale Maximum	--

Choose your voting scale. If you choose "Multiple Scale", you must then choose the minimum and maximum for the scale.

minations AI *	No
mber of Nomi	1
tion Form	--
Candidate h *	Yes

Scale	--
Scale Minimum	--
Scale Maximum	--
Form	--
mber of Votes	--

Enter the max number of votes per person.

Scale	Single Scale
Scale Minimum	--
Scale Maximum	--
Form	--
mber of Votes	--

Click Save.

The election is now ready for people to participate.

Whether you have nominations or not, candidates will need to be added so people can vote. This does not happen automatically.

For help with adding candidates, use the assist "Add a Candidate to an Election"

Election: New Election

ramco35uatupgrade.ramcotest.com/main.aspx#432405438

RAMCO Elections Elections > New Election

SAVE SAVE & CLOSE + NEW FORM EDITOR

ELECTION : COBALT MEMBERSHIP DYNAMICS

New Election

Write In Nominator *	No
Self Nominations AI *	No
Max Number of Nomi	1
Nomination Form	--

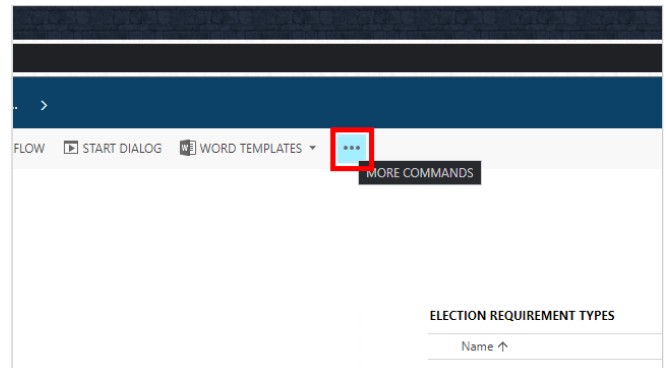


RAMCO Portal

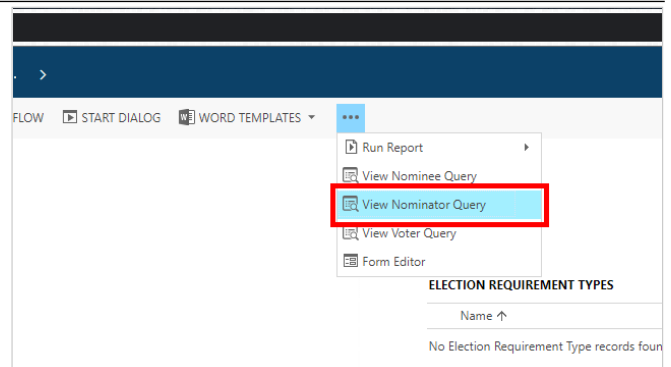
5.2.2. Restrict Nominators to REALTOR Members Only

From an election record.

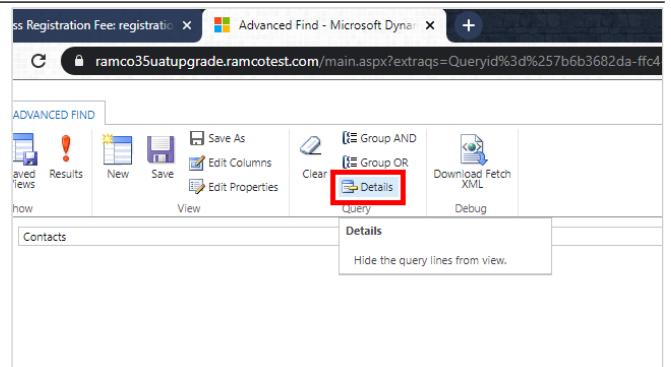
Click the More Commands button



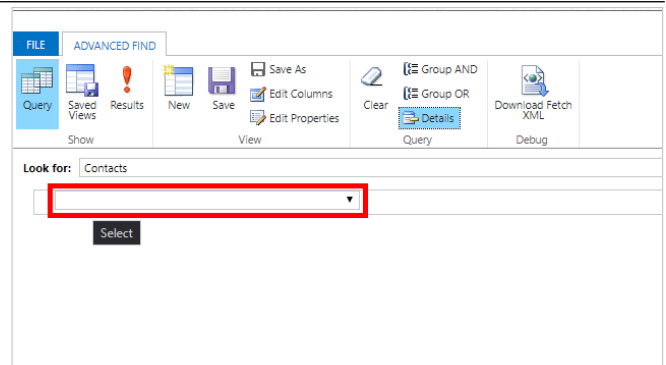
Click on the command button **View Nominator Query**



Make sure details are enabled.



Click the select menu





RAMCO Portal

Click on the item **Memberships (Contact)** in the list

Look for: Contacts

- Meeting Activity Speakers (Contact)
- Meeting Exhibitors (Contact)
- Meeting Registration Activities (Registered By)
- Meeting Registrations (Contact)
- Meeting Registrations (Registered By)
- Member Demographic (Contact)
- Member Education (Contact)
- Member Financials (Incurring Member)
- Member Financials (Member)
- Membership Applications (Contact)
- Memberships (Contact)**
- Mobile Phone Country
- Modified By (Delegate)
- Modified By (External Party) (External Party)
- Modified By (User)
- Name Changes (Contact)

Click the select menu

Look for: Contacts

Memberships (Contact)

Select

Click on the item **Association** in the list

Fields

- Account
- Allow Dues When Inactive
- Appraiser License Name
- Approved by Board Date
- Arbitration Ethics Pending
- Association**
- Contact
- Created By
- Created By (Delegate)
- Created On
- Dues Billing Responsibility
- Dues Waived Local

Click on the textbox for the Lookup field

or: Contacts

Association

Enter Value



RAMCO Portal

Search for your association record by name.

or: | Contacts

Select

Memberships (Contact)

Association Equals [Search Input]

Select

Click on the select menu

Look for: Contacts

Select

Memberships (Contact)

Association Equals [Select]

Click on the item **Member Type** in the list

Memberships (Contact)

Association Equals ST PAUL AREA ASSOCIATIO--

Member Type

- Membership
- MLS Association
- MLS ID
- MLS Status
- Modified By
- Modified By (Delegate)
- Modified On
- Name
- National Dues Paid Date
- NRDS ID
- NRDS Insert Date
- NRDS Timestamp
- Office
- Online Status
- Online Status Date
- Out Out

Choose the REALTOR member type.

View Query Debug

Use Saved View: [new]

Memberships (Contact)

Association Equals Enter Value

Type Equals [REALTOR]

Enter Value



RAMCO Portal

Click on the select menu

Look for: Contacts

Select

Memberships (Contact)

Association Equals ST PAUL AREA ASSOCIATIO...

Member Type Equals REALTOR

Member Type

Click on the item **Status** in the list

Memberships (Contact)

Association Equals ST PAUL AREA ASSOCIATIO...

Member Type Equals REALTOR

Member Type

Opt Out

Opt Out Date

Orientation Date

Owner

Previous Non-Member

Primary Membership

Real Estate License Name

Real Estate or Appraiser License Number

Record Created On

Reinstatement Code

Reinstatement Code Date

State Association

State Dues Paid Date

Status

Status Date

Status Reason

Related

Click on the button **Select or change the values for this field**

Edit Properties

Details

View

Query

Debug

Use S

Equals

ST PAUL AREA ASSOCIATIO...

Equals

REALTOR

Equals

Select or change the values for this field

Select "Active" then use the arrows to move it to the "Selected Values" area.

Select Values

Select the values you want included.

Available Values

Active

Inactive

>>

<<

Selected Values

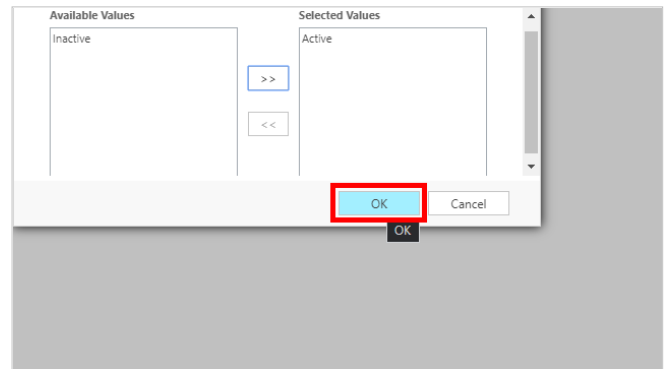
OK

Cancel



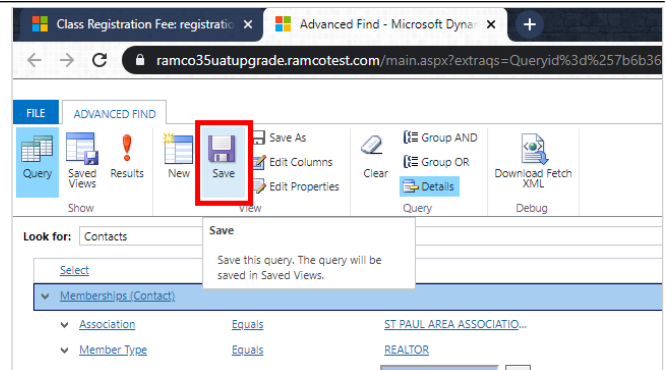
RAMCO Portal

Click on the button **OK**



Click **Save**.

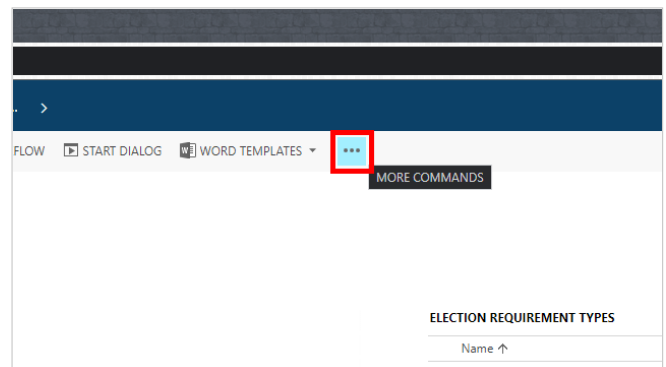
This registration fee is not restricted to the results of this query.



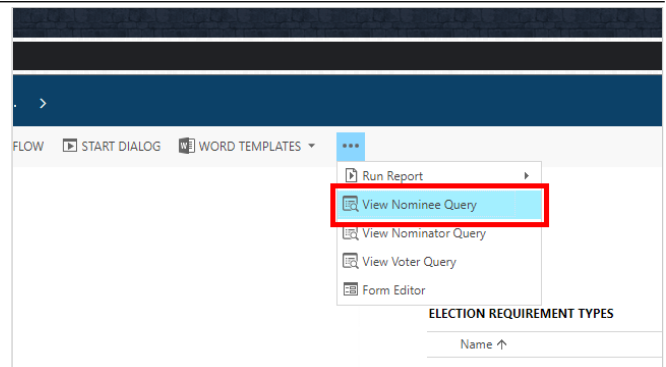
Please restart this assist from an election record.

5.2.3. Restrict Nominees to Committee Members Only

From an election record, click on the More Commands button.



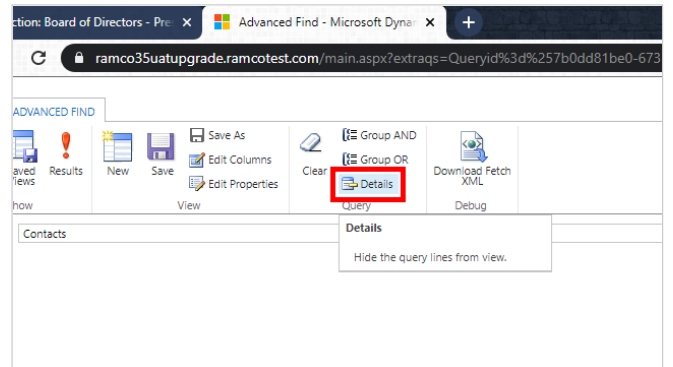
Click on the command button **View Nominee Query**



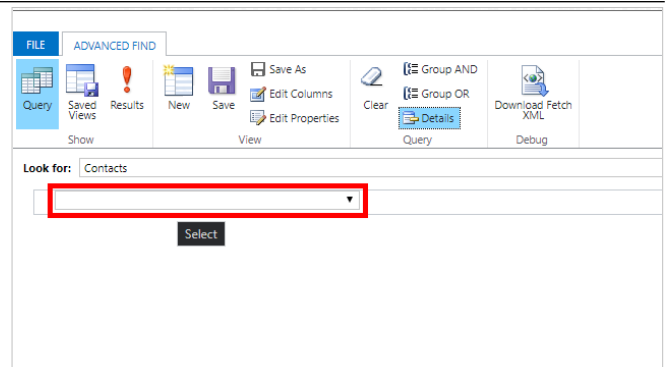


RAMCO Portal

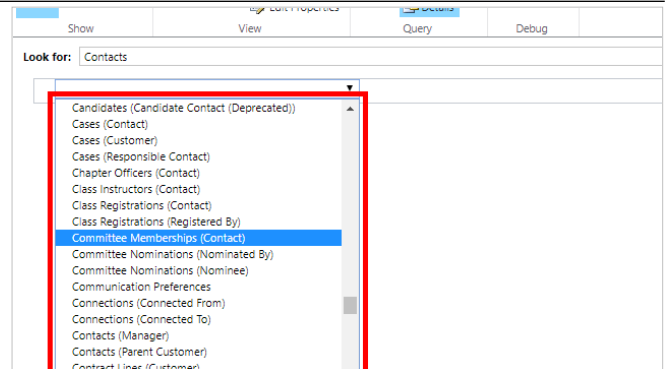
Make sure details are enabled.



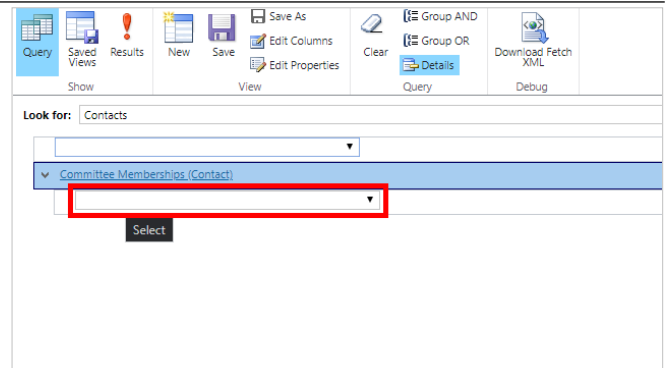
Click on the select menu.



Click on the item **Committee Memberships (Contact)** in the list



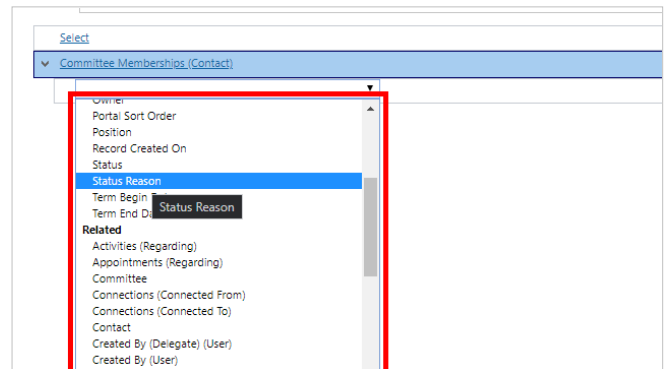
Choose the select menu



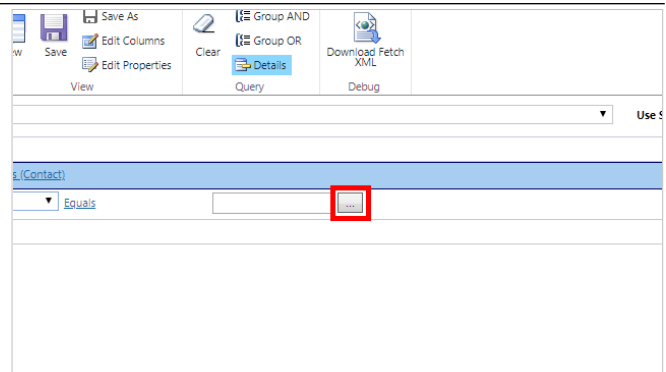


RAMCO Portal

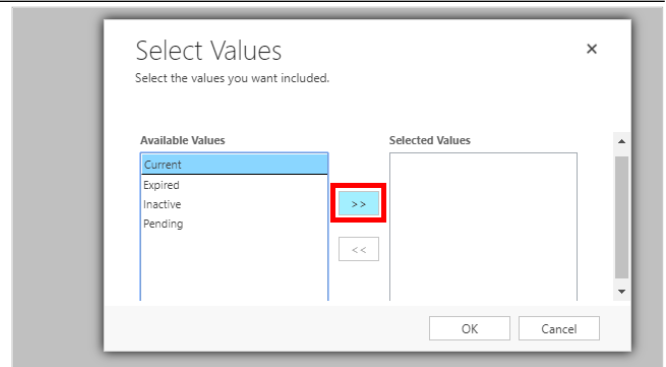
Click on the item **Status Reason** in the list



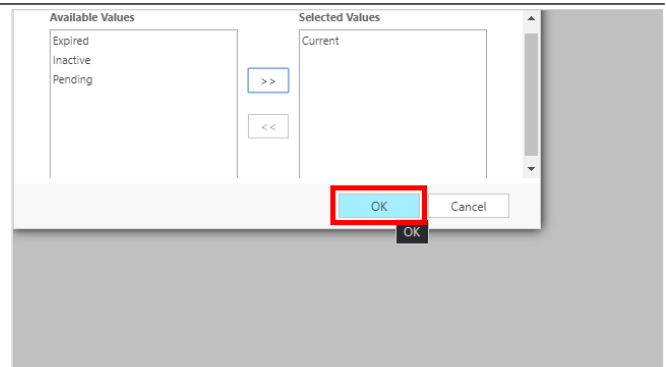
Click on the button **Select or change the values for this field**



Move current to the selected values column



Click on the button **OK**

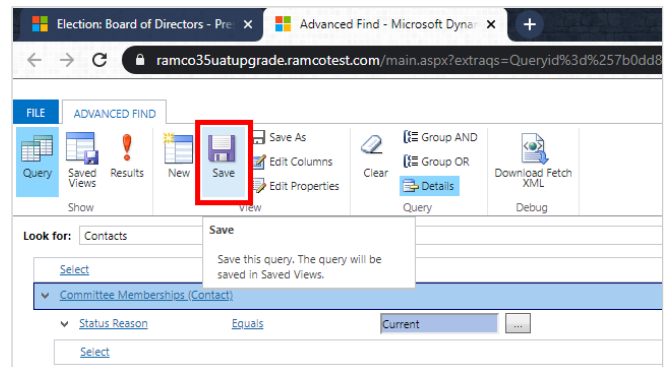




RAMCO Portal

Click save.

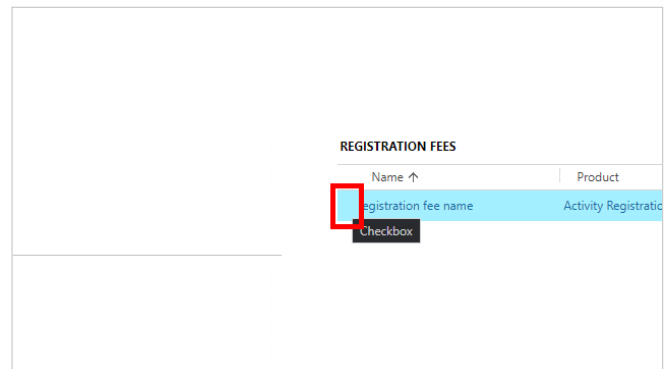
Nominees will now be restricted to members of a committee



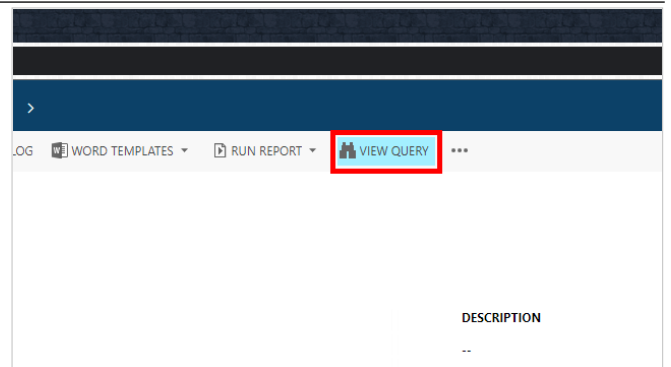
Please restart this assist from an election record.

5.2.4. Restrict Registration Fee to REALTOR Members Only

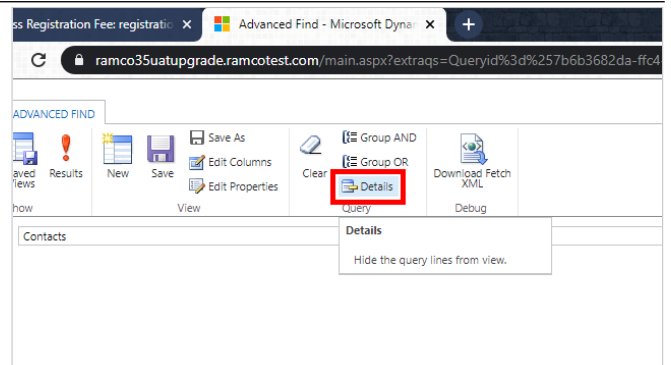
Select and open a registration fee.



Click on the command button **View Query**



Make sure details are enabled.





RAMCO Portal

Click the select menu

The screenshot shows the top section of the RAMCO Portal. At the top, there are two tabs: 'FILE' and 'ADVANCED FIND'. Below these are several icons for actions like 'Query', 'Saved Views', 'Results', 'New', 'Save', 'Save As', 'Edit Columns', 'Edit Properties', 'Clear', 'Group AND', 'Group OR', 'Details', and 'Download Fetch XML'. Below the icons, there is a 'Look for:' label followed by a dropdown menu. The dropdown menu is currently open, showing a list of items. The item 'Memberships (Contact)' is highlighted in blue. A red rectangle is drawn around the dropdown menu.

Click on the item **Memberships (Contact)** in the list

This screenshot shows the same interface as the previous one, but the dropdown menu is now closed. The item 'Memberships (Contact)' is now the selected item, and its name is displayed in the 'Look for:' field. A red rectangle is drawn around the dropdown menu area.

Click the select menu

This screenshot shows the same interface as the previous one, but the dropdown menu is now closed. The item 'Memberships (Contact)' is now the selected item, and its name is displayed in the 'Look for:' field. A red rectangle is drawn around the dropdown menu area.

Click on the item **Association** in the list

This screenshot shows the same interface as the previous one, but the dropdown menu is now closed. The item 'Association' is now the selected item, and its name is displayed in the 'Look for:' field. A red rectangle is drawn around the dropdown menu area.



RAMCO Portal

Click on the textbox for the Lookup field

or: Contacts

Select

Memberships/Contact

Association Equals

Enter Value

Search for your association record by name.

or: Contacts

Select

Memberships/Contact

Association Equals

Click on the select menu

Look for: Contacts

Select

Memberships/Contact

Association Equals

ST PAUL AREA ASSOC

Click on the item **Member Type** in the list

Memberships/Contact

Association Equals

ST PAUL AREA ASSOCIATIO...

Member Type

- Membership
- MLS Association
- MLS ID
- MLS Status
- Modified By
- Modified By (Delegate)
- Modified On
- Name
- National Dues Paid Date
- NRDS ID
- NRDS Insert Date
- NRDS Timestamp
- Office
- Online Status
- Online Status Date
- Oot Out



RAMCO Portal

Choose the REALTOR member type.

The screenshot shows the 'Type' dropdown menu in the RAMCO Portal. The dropdown is open, and the 'REALTOR' option is highlighted. A red box highlights the 'Type' dropdown and the 'Enter Value' button.

Click on the select menu

The screenshot shows the 'Status' dropdown menu in the RAMCO Portal. The dropdown is open, and the 'Status' option is highlighted. A red box highlights the 'Status' dropdown and the 'Enter Value' button.

Click on the item **Status** in the list

The screenshot shows the 'Status' dropdown menu in the RAMCO Portal. The dropdown is open, and the 'Status' option is highlighted. A red box highlights the 'Status' dropdown and the 'Enter Value' button.

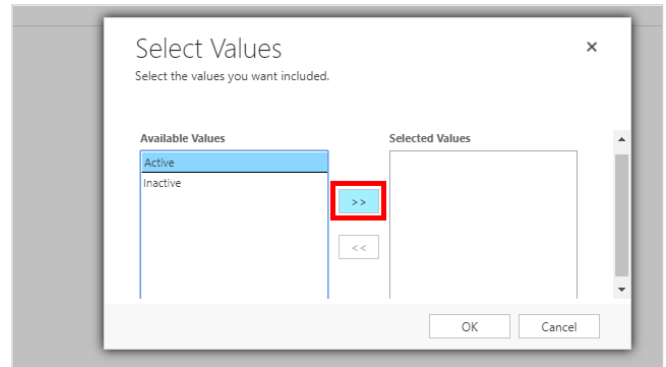
Click on the button **Select** or change the values for this field

The screenshot shows the 'Status' dropdown menu in the RAMCO Portal. The dropdown is open, and the 'Status' option is highlighted. A red box highlights the 'Status' dropdown and the 'Enter Value' button.

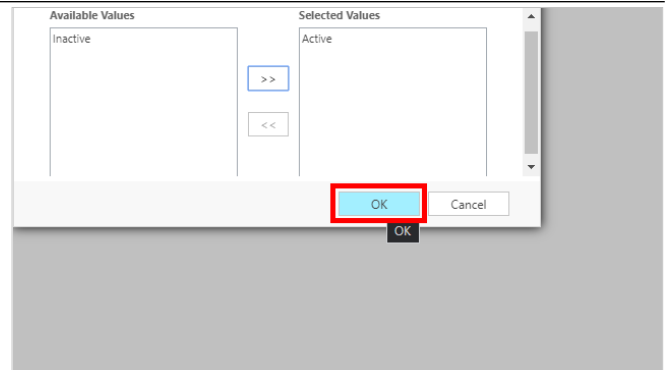


RAMCO Portal

Select "Active" then use the arrows to move it to the "Selected Values" area.

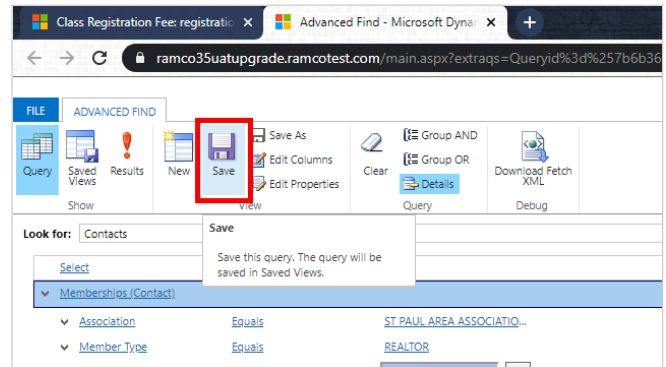


Click on the button **OK**



Click Save.

This registration fee is not restricted to the results of this query.



Please restart this assist from a class record.



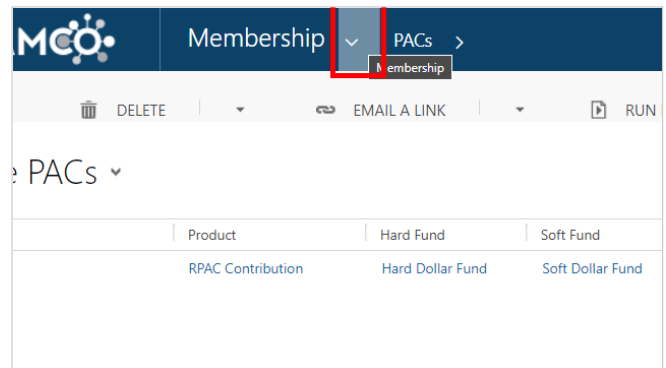
RAMCO Portal

6. Advocacy

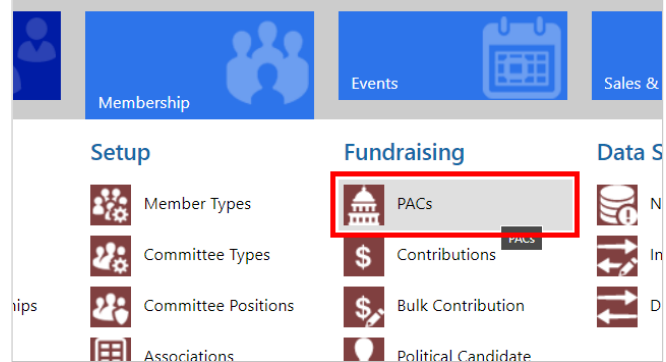
6.1. PAC Set Up

6.1.1. Create a PAC Cycle

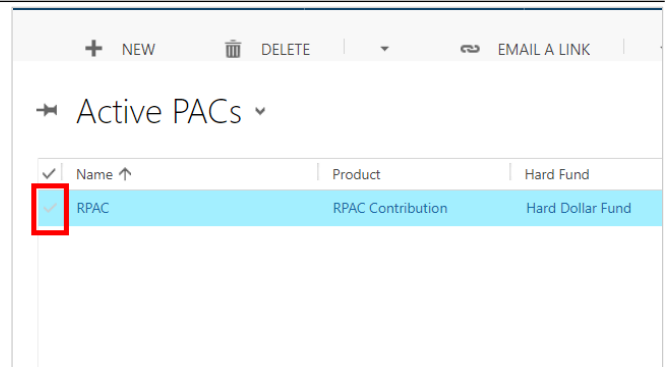
Open the Navigation Areas



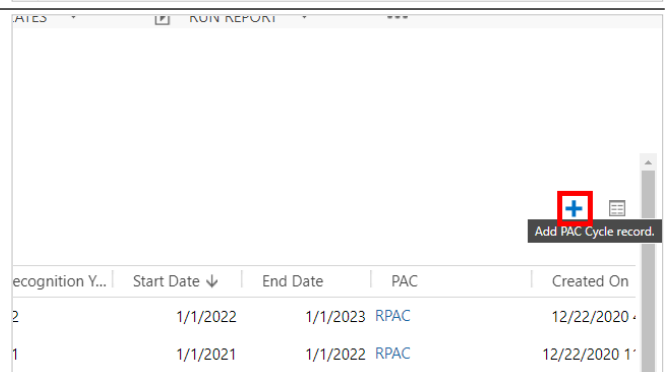
Choose the PACs Entity



Double click the row of a PAC to add a PAC Cycle for it.



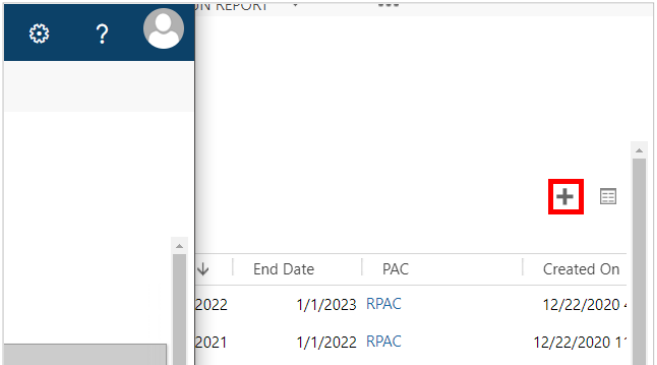
Click the plus icon to add a new PAC Cycle





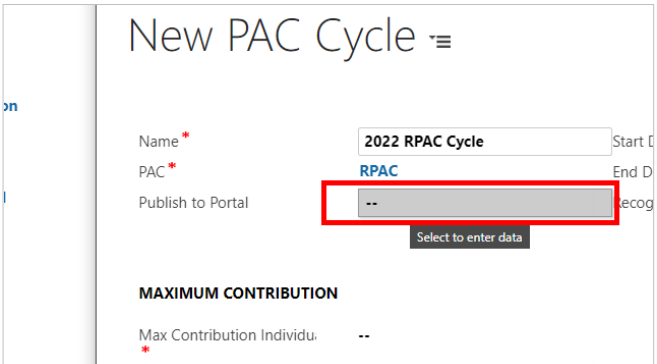
RAMCO Portal

Give the PAC cycle a name



	End Date	PAC	Created On
2022	1/1/2023	RPAC	12/22/2020
2021	1/1/2022	RPAC	12/22/2020

Set "Publish to Portal" to yes to allow members to make contributions at their convenience



New PAC Cycle

Name * 2022 RPAC Cycle Start Date

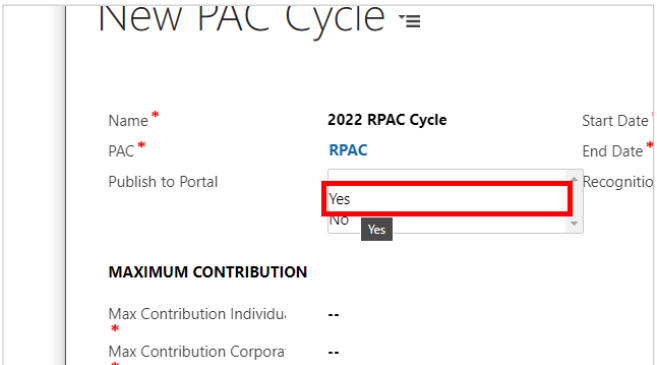
PAC * RPAC End Date

Publish to Portal -- Select to enter data

MAXIMUM CONTRIBUTION

Max Contribution Individu. --

Click on the picklist **Publish to Portal** value **Yes**



New PAC Cycle

Name * 2022 RPAC Cycle Start Date

PAC * RPAC End Date

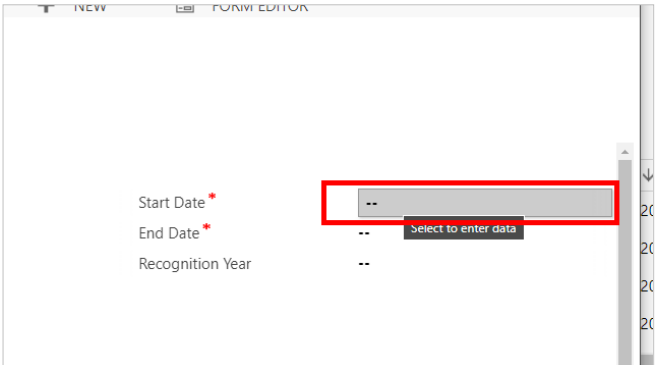
Publish to Portal Yes Recognition

MAXIMUM CONTRIBUTION

Max Contribution Individu. --

Max Contribution Corpora. --

Set the start date of the PAC Cycle



New PAC Cycle

Name * 2022 RPAC Cycle Start Date

PAC * RPAC End Date

Publish to Portal Yes Recognition

MAXIMUM CONTRIBUTION

Max Contribution Individu. --

Max Contribution Corpora. --



RAMCO Portal

Set the End Date

Start Date *	1.1.2022
End Date *	--
Recognition Year	--

Select to enter data

Enter a recognition year. This must be a 4 digit number.

Start Date *	1/1/2022
End Date *	12.31.2022
Recognition Year	--

Select to enter data

Set the maximum contribution for an individual. A member will not be allowed to exceed this number in this PAC cycle.

Name	2022 RPAC Cycle	Start U
PAC *	RPAC	End D
Publish to Portal	Yes	Recog

MAXIMUM CONTRIBUTION

Max Contribution Individu *	--
Max Contribution Corpora *	--

Select to enter data

Active Contributions ▾

Set the maximum contribution for a corporation. The corporation will not be allowed to exceed this number in this PAC cycle.

Publish to Portal	Yes	Recog
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MAXIMUM CONTRIBUTION

Max Contribution Individu *	\$ 5000
Max Contribution Corpora *	--

Select to enter data

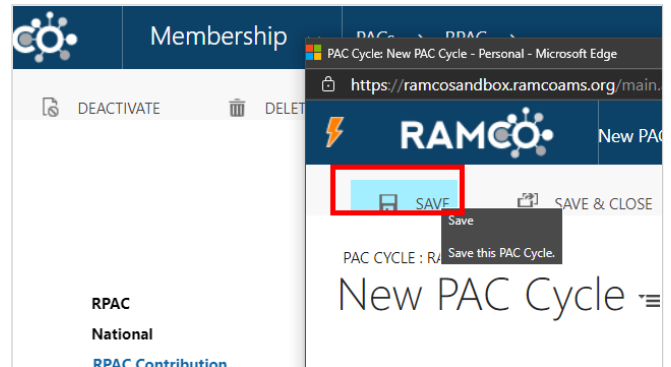
Active Contributions ▾

Search for records



RAMCO Portal

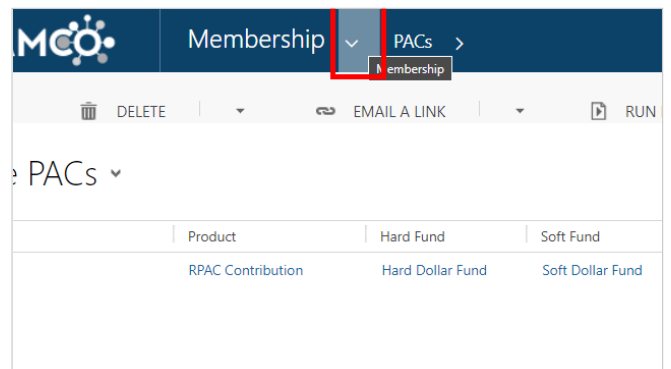
Click on the command button **Save**



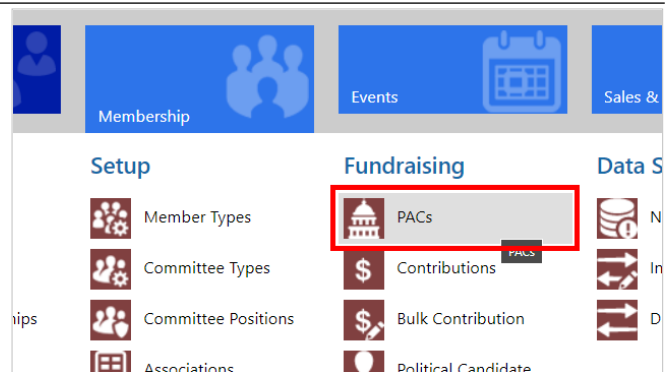
6.2. PAC Set Up

6.2.1. Create a PAC Cycle

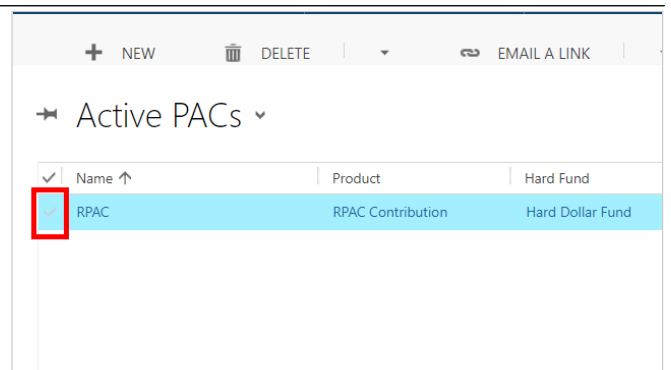
Open the Navigation Areas



Choose the PACs Entity



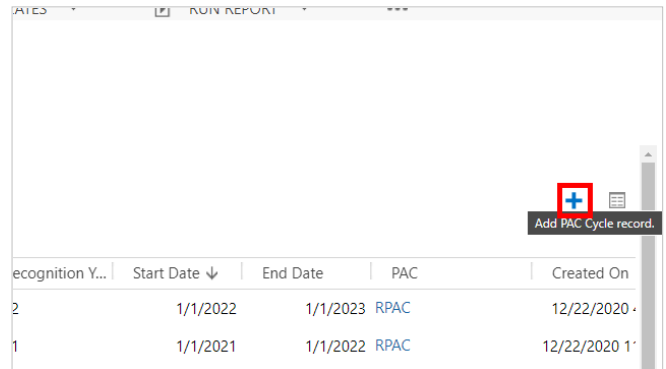
Double click the row of a PAC to add a PAC Cycle for it.





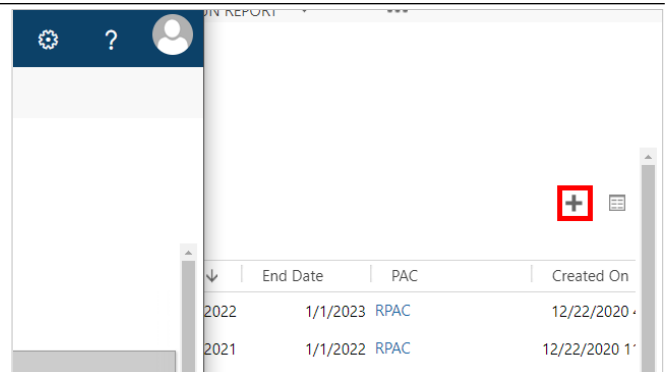
RAMCO Portal

Click the plus icon to add a new PAC Cycle



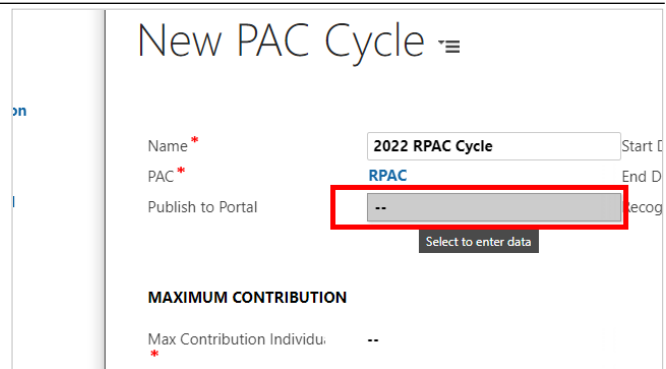
Recognition Y...	Start Date ↓	End Date	PAC	Created On
2	1/1/2022	1/1/2023	RPAC	12/22/2020
1	1/1/2021	1/1/2022	RPAC	12/22/2020

Give the PAC cycle a name



End Date	PAC	Created On
2022	1/1/2023 RPAC	12/22/2020
2021	1/1/2022 RPAC	12/22/2020

Set "Publish to Portal" to yes to allow members to make contributions at their convenience



New PAC Cycle

Name * 2022 RPAC Cycle Start Date

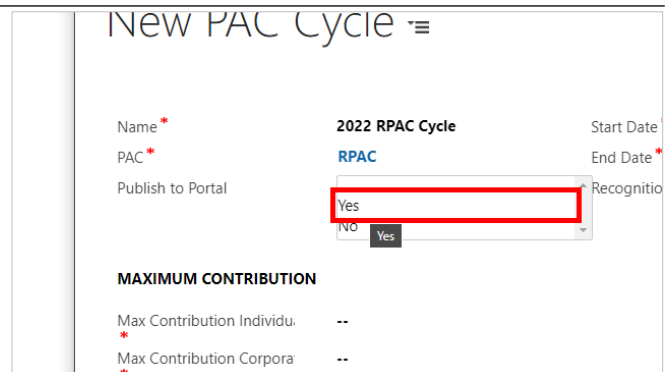
PAC * RPAC End Date

Publish to Portal -- Select to enter data

MAXIMUM CONTRIBUTION

Max Contribution Individu. --

Click on the picklist **Publish to Portal** value **Yes**



New PAC Cycle

Name * 2022 RPAC Cycle Start Date

PAC * RPAC End Date

Publish to Portal Yes Recognition

MAXIMUM CONTRIBUTION

Max Contribution Individu. --

Max Contribution Corpora --



RAMCO Portal

Set the start date of the PAC Cycle

Form titled "NEW FORM EDITOR" showing fields for Start Date, End Date, and Recognition Year. The Start Date field is highlighted with a red box and contains "--". A "Select to enter data" button is visible below the field.

Set the End Date

Form titled "NEW FORM EDITOR" showing fields for Start Date, End Date, and Recognition Year. The Start Date field contains "1.1.2022". The End Date field is highlighted with a red box and contains "--". A "Select to enter data" button is visible below the field.

Enter a recognition year. This must be a 4 digit number.

Form titled "NEW FORM EDITOR" showing fields for Start Date, End Date, and Recognition Year. The Start Date field contains "1/1/2022" and the End Date field contains "12.31.2022". The Recognition Year field is highlighted with a red box and contains "--". A "Select to enter data" button is visible below the field.

Set the maximum contribution for an individual. A member will not be allowed to exceed this number in this PAC cycle.

Form titled "2022 RPAC Cycle" showing fields for Name, PAC, Publish to Portal, and Recognition Year. The PAC field contains "RPAC" and the Publish to Portal field contains "Yes". The Recognition Year field contains "12.31.2022". Below these fields is a section titled "MAXIMUM CONTRIBUTION" with fields for Max Contribution Individual and Max Contribution Corporate. The Max Contribution Individual field is highlighted with a red box and contains "--". A "Select to enter data" button is visible below the field.



RAMCO Portal

Set the maximum contribution for a corporation. The corporation will not be allowed to exceed this number in this PAC cycle.

This screenshot shows a web form titled "MAXIMUM CONTRIBUTION". At the top, there is a "Publish to Portal" section with a "Yes" button and a "Recognize" link. Below this, the "MAXIMUM CONTRIBUTION" section contains two input fields. The first field, "Max Contribution Individual", has a red "x" icon and a value of "\$ 5000". The second field, "Max Contribution Corpora", has a red asterisk icon and a dropdown menu with a red box around it containing "--" and a "Select to enter data" button. Below these fields is an "Active Contributions" section with a dropdown arrow and a search bar labeled "Search for records".

Click on the command button **Save**

This screenshot shows a web form titled "New PAC Cycle". The form has a blue header with the RAMCO logo and the text "Membership". Below the header, there is a "DEACTIVATE" button and a "DELETE" button. The main content area is titled "RPAC National" and "RPAC Contribution". A red box highlights a "SAVE" button. To the right of the "SAVE" button is a "SAVE & CLOSE" button. Below the buttons, there is a "PAC CYCLE : R" label and a "Save this PAC Cycle." button. The form is displayed in a Microsoft Edge browser window with the address bar showing "https://ramcosandbox.ramcoams.org/main".