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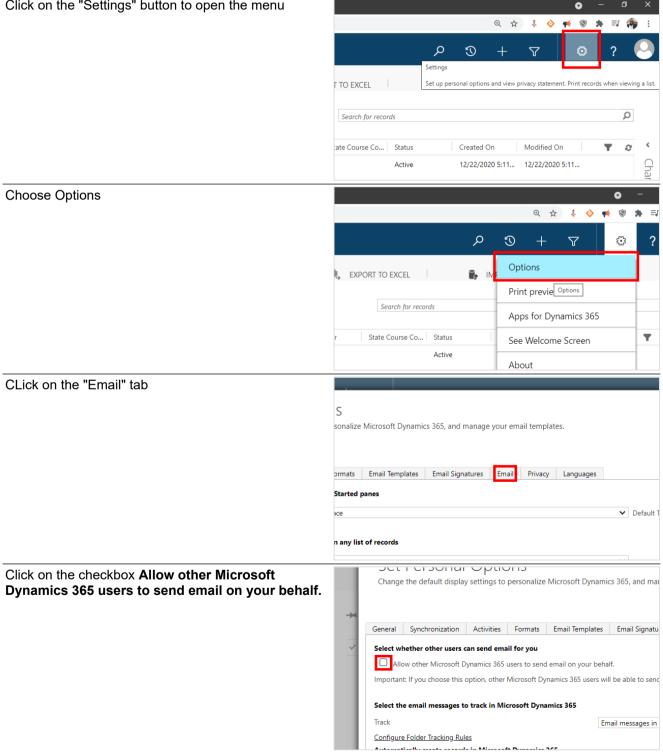


1. Core

1.1. User Settings

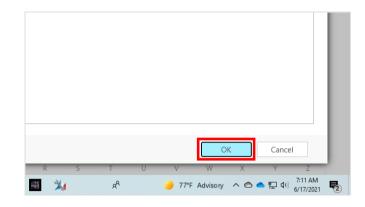
Allow the System to Send Emails for You 1.1.1.

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Click Ok to close the settings window.



1.1.2. Increase Number of Records Per Page

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1.1.3. Set Advanced Find Mode to Detailed

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1.1.4. Set Your RAMCO Home Page

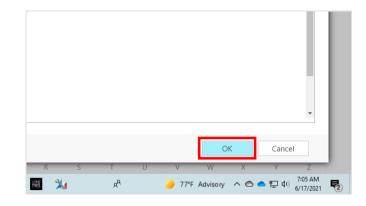
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		Accounts Contacts
		Dashboards
		Activities Reports
		Data Management
		Memberships Committees
		Dues Cycles
		Courses Classes
		Meetings
		Products



Click OK to close the settings menu



1.1.5.	Set Your Time Zone					
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1.1.6. Update User Settings

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Click on the radio button Automatically send an error report to Microsoft without asking me for permission	DUD AREA ASSOCIATION OF REALTORS (IINESOTA ASSOCIATION OF REALTORS am (505510505) nco, Remmy (505510506)	General Synchronization Activities Formats Email Temple Select your error notification preference Please help us to improve your experience with Microsoft Dynamics 36: Every time that a Web application error occurs when I run Microsoft Dynamics 36: Every time that a Web application error occurs when I run Microsoft Dynamics 36: Image: Comparison of the premission to send an error report to Microsoft Ask me for permission to send an error report to Microsoft without asking otherward and error report to Microsoft about Microsoft Dynamics View Privacy Statement View Privacy Statement
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1.2. Core (Advanced)

1.2.1. Resetting Passwords

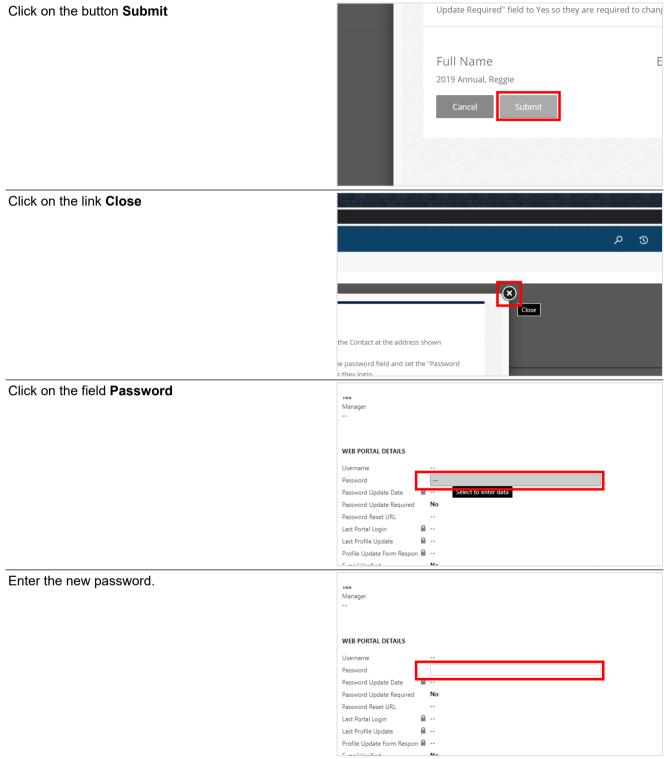
Open the Navigation Areas





Click on the "Contacts" entity.	Workplace Membership	Events S
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	Accounts	ards Memberships
	Contacts 📝 Activitie	
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	Member Status: Primary Association:	
Open the contact record to have their password reset.	📕 RAMEÇ Workpl	aCe ∨ Contacts >
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		Meeting Registration
		Payment Profile
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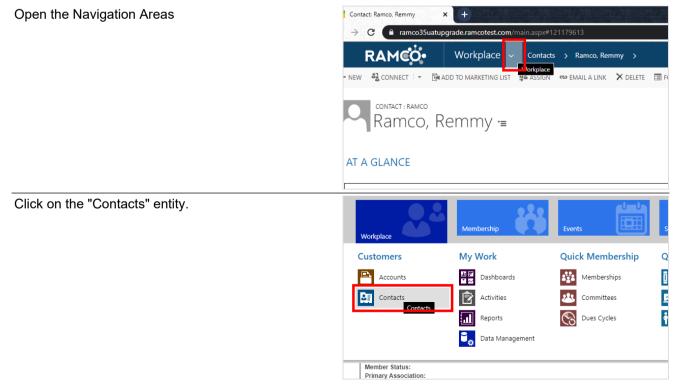






Change the field "Password Update Required" to force the member to update their password upon	••
login.	WEB PORTAL DETAILS
	Username
	Password newpassword
	Password Update Date 🔒
	Password Update Required No
	Password Reset URL No
	Last Portal Login 🔒
	Last Profile Update 🔒
	Profile Update Form Respon 🗎
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Click Save to complete the process.	
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1.2.2. Saving a Credit Card for Future Use (Payment Profile)





Select a contact to add credit card info for.	👂 RAMCO Workplace ~ Contacts >
	+ NEW 🖋 EDIT 🗸 ACTIVATE 🔂 DEACTIVATE 💼 DELETE 🕞 🏪 MERGE 🖾 SEND DIRECT EMAI
	→ Search Results
	✓ Last Name ↑ First Name ↑ NRDS ID Username Parent Customer Prima ✓ Damage Damage <td< th=""></td<>
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Click on the command button MORE COMMANDS	
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Click on the command button Payment Profile	Deactivation Wizard
	Process Payment Membership Application
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	i Meeting Registration 1: ↓ Class Registration
	Payment Profile
	RDS Sync Payment Profile
	Password R Update Contact's Payment Profile
	⊂: ⊂:: Relationship ►
Choose the credit cart type.	
	Credit Card Terminal Output [optional]
	Card Type
	Visa MasterCard
	American Express Discover
	Discover
	Security Code (CVV/CVV2)



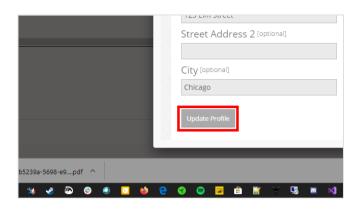
Enter Credit Card Details		
		Card Type
		Visa 🔹
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		5
		Expiration Date (MM/YYYY)
		· · · ·
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Set the Expiration Month		Card Type
		Visa 🗸
		Card Number
		**********1111 ×
		Expiration Date (MM/YYYY)
		June v 2024 v
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		Billing Address
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	Card Number	Last Name
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		✓ 2024✓
	June	✓ 2024✓
	June	✓ 2024✓
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	biration Date (I	2047	Save this card to	o my profile
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Input the Cardholder's Last Name	suit Caru Term	пагоцристора	lonal	
Input the Cardholder's Last Name				
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Set the billing address to be used with this card.				Save this card to m
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		Ci i		
Click on the button Update Profile			Address 1 [optional]	State [option Kansas
			Address 2 [optional]	Zip Code 🗠
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		10.0		
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Click the button "Update Profile" to store the credit in eCommerce.



1.2.3. Add Meal Choice Question to a Class Registration Fee

Open the Navigation Areas	acts Active Contacts - Micro 🗙 🕂				
	C (a ramcosandbox.ramcoams.org/main.aspx#744029292				
	RAMCO Workplace V Contacts >				
	for Dynamics 365 View Dynamics 365 information on the go Workplace your phone, tablet, Outlook, and more!				
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Form must be configured for the process you plan to			
use it in.	s or types, select an entity	from the related list	
Choose Class Registration.	s of types, select an entity	from the related list	
	<u></u>	.or Select a Re	lated Entity [optional]
	~		
Click on the button Configure Form		Note: For form	s that are associated with application fees or type
	ember Subclass Quest		
		Select an En	tity [optional]
		Save and Close	Configure Form
Use the "Add Controls (Unmapped)" menu to choose an unmapped field.	How many years ha neld a membership REALTOR associatio	to a local	Select Page Page 1
Unmapped means when a person answer the question, we simply save their answers to read later.			New Page Edit Page Delete Page
The alternative to unmapped questions are "Mapped"			Add Controls (Unmapped)
questions. These fields will update the members data			
once answered For example, if a member answers			Add Control Add Section
once answered. For example, if a member answers and email guestion, their email in RAMCO will be			Add Control Add Section
and email question, their email in RAMCO will be changed.			Add Fields (Mapped)
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and email question, their email in RAMCO will be changed. When asking about meal preference, there is no place to update that in RAMCO, so we ask it as an			Add Fields (Mapped) ramco_formresponse_committeenomir v Add Controls (Unmapped) v Single Line Text (nvarchar) Single Line Password (nvarchar masked)
and email question, their email in RAMCO will be changed. When asking about meal preference, there is no place to update that in RAMCO, so we ask it as an Unmapped question.			Add Fields (Mapped) ramco_formresponse_committeenomir Add Controls (Unmapped) Single Line Text (nvarchar) Single Line Password (nvarchar masked) Phone Number (country / phone) Static Option Set (picklist)
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and email question, their email in RAMCO will be changed. When asking about meal preference, there is no place to update that in RAMCO, so we ask it as an Unmapped question.			Add Fields (Mapped) ramco_formresponse_committeenomir 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)

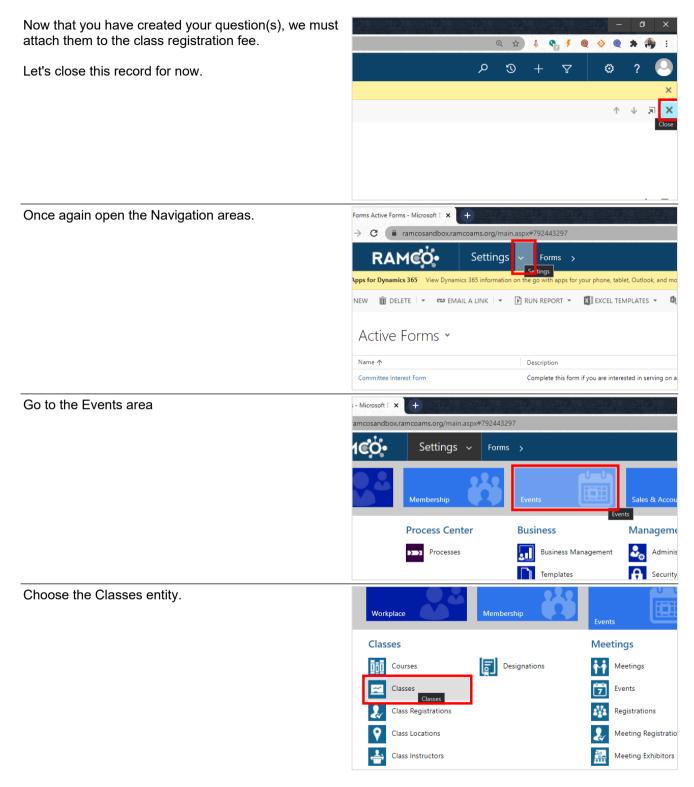


Click on the button Add Control	New Page Edit Page Delete Page
	Add Controls (Unmapped)
	Static Option Set (picklist)
	Add Control Add Section
	Add Fields (Mapped)
	cobalt_cobalt_formresponse_cobalt_cla: v
	Field an Dalaka d Eakika
Now that the blank question is on the form, we must now configure the question.	
Click Edit	
	Section 1 (edit)
	Click to configure (edit)
	Save and Close
Since are asking a meal choice question, we will need to add several choices for the person to choose from.	
	– Answers
to add several choices for the person to choose from. Click "Add Answer" to add an option.	
to add several choices for the person to choose from.	– Answers
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	- Answers Your search returned no results.
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	- Answers Your search returned no results. Add Answer + Advanced Options
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	- Answers Your search returned no results. Add Answer
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.	- Answers Your search returned no results. Add Answer + Advanced Options
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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.	- Answers Your search returned no results. Add Answer + Advanced Options Cancel Delete Question Save Ques - Answers
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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.	- Answers Your search returned no results. Add Answer + Advanced Options Cancel Delete Question Save Ques - Answers



Then add it again here.		×
Repeat this for all the meal choices you plan to offer.	– Answers	
	Name	Value
	Chicken	[1
		[]2
		3
		4
Once all the meal choices have been added, click save	1	Save Delete
	2	Save Delete
	3	Save Delete
	4	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 Image: Add Answer Image: Add Answer Emote Cancel Delete Question Image: Add Answer Image: Add Answer Image: Add Answer Image: Add Answer	Save Question
Once saushed with your form, click Save and Close	Meal Choice Vame 🖻	Section 1 (edit) What is your meal preference? (e Save and Close





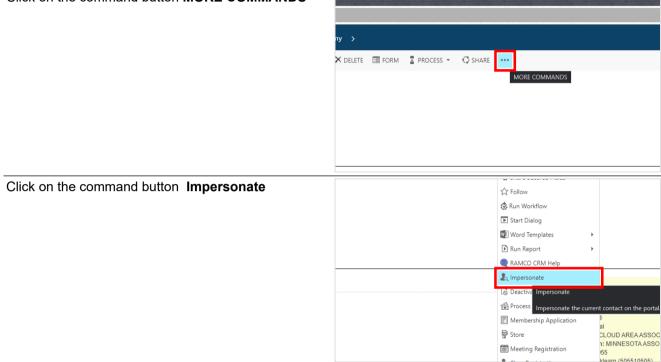


Find the class you wish to add the questions, then open it.	→ Active Cl	asses ¥	
1	✓ Name	Course	Current Registrations Max
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	Test Class 01	Test Cou	rce 1 1
	new Test Class 3	Technolo	gy Course 101
	Example Class - With	h Documents Technolo	gy Course 101 1
	oRIENTATION	Test Cou	rce 1 2
	Code of Ethics	Code of	Ethics 2
	RAMCON COE Class	Code of	Ethics
	COF AT RAMCON	Code of	Ethics
Form questions must be attached to a registration fee.			
Choose the registration fee that will ask these questions.			
		REC	SISTRATION FEES
If you want all or several registrations fees to ask the			Name 🛧 Product
same questions you may select all of them.			Code of Ethics Farly Bird
			Code of Ethics
		Modified On Modified By	 ■ 6/19/2020 10:01 AM ■ SYSTEM
Add our nowly graated form to the "Form" field			
Add our newly created form to the "Form" field.			
Add our newly created form to the Form field.	Name*	Code of Ethics	
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1.2.4. Log into Portal as Member

Click on the command button MORE COMMANDS



Please restart this assist from a Contact record.

1.2.5. Performing a Name Change

Click on the "View Related" button. ncotest.com/main.aspx#1691947 rkplace 🗸 🛛 Contacts 🕉 Ramco, Rei io, Remmy FORM 🛓 PROCESS 🔻 MARKETING LIST 🍰 ASSIGN 🖘 EMAIL A LINK 🗙 DELETE C SHARE ... ımy _{"≡} Click on the entity "Name Changes". **Events** Common Refund Items Class Registrations Activities Integration C 9 1 Name Changes ₽ Meeting Registrations 20 Contacts Cases E. ibutions Meeting Registration ... \mathbb{Z} Manager Des <u>ات</u> ibution Levels 272 Registrations Languages Offices Meetings (Speaker) **.** ¢° Services Provided Customer Re



1. Enter the new name.	CURRENT NAME Prefix Mr. First Name* Remmy 2 riddle Name A 3 Last Name* R 4+5 Suffix
Click on the command button Run Workflow	e Change: Ramco, Remmy to Ramco, Remmy - Google Chrome nco35uatupgrade.ramcotest.com/main.aspx?etc=100578/pagetype=entityrecord&extraqs=%3f_CreateF Ramco, Remmy to R > EW DEACTIVATE DELETE HAILA LINK RUN WORKFLOW START DIALOG WORD TEL Num Vorkflow Run a workflow of this Name Change. HMCO, REMMY to R '= New the status of workflows in the Workflow
Select the "Approve Name Change" workflow.	son nortic Son Enter your search criteria. d On A Approved By ■ Approved On ■ Process ▼ ■ : Look in On Demand Workflows ▼ Search Search for records ● Process Name Change Workflow Checkbox
Click on the button Add	S 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



Click on the button \mathbf{OK}

Confirm Applica This workflow will be applied to 1	ation of Workflow ^{I Name Change.}	×
You can monitor workflow jobs by Are you sure that you want to c	opening each Name Change and clicking Workflo ontinue?	W5.
	ОК	Cancel
<		•
1 - 1 of 1 (1 selected)	14	✓ Page 1 ▶
	Add Cancel R	Remove Value

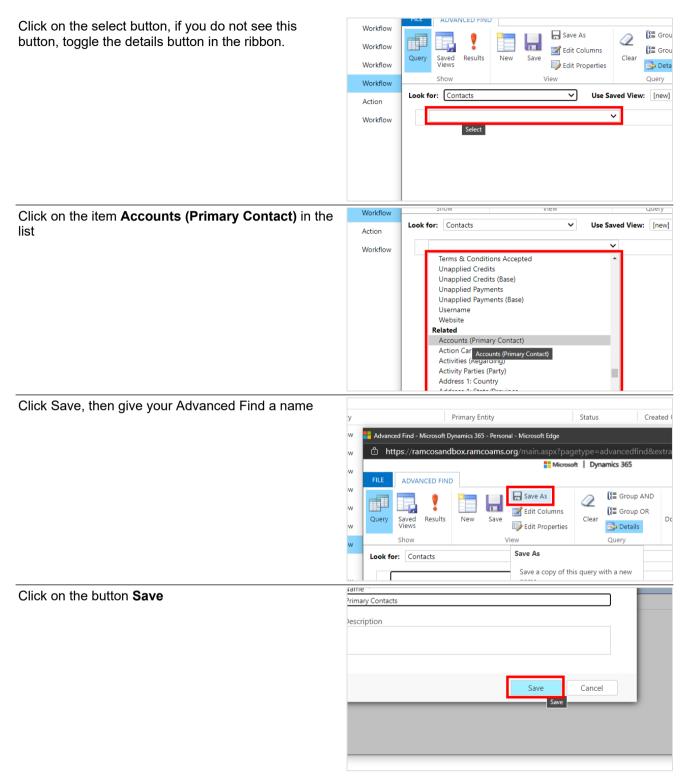
1.3. Advanced Finds

1.3.1. Create an Advanced Find

Click the Funnel icon in the Navigation Bar

Click the Funnel icon in the Navigation Bar			م	3	+	7	٢	? 🍳
	Search for	r records					dvanced Find	search queries.
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	9							Micro
Click the "Look For" dropdown menu, and set it to contacts			Workflow	FILE	ADVANO	CED FIND		
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		Query	saveu nesun		Jory Equa			ieai
Click on the item Contacts in the list	Workflow Workflow		Views Show		V	iew	Properties	Query
	Action	Look for:	Processes			~	Use Saved	View: My Process
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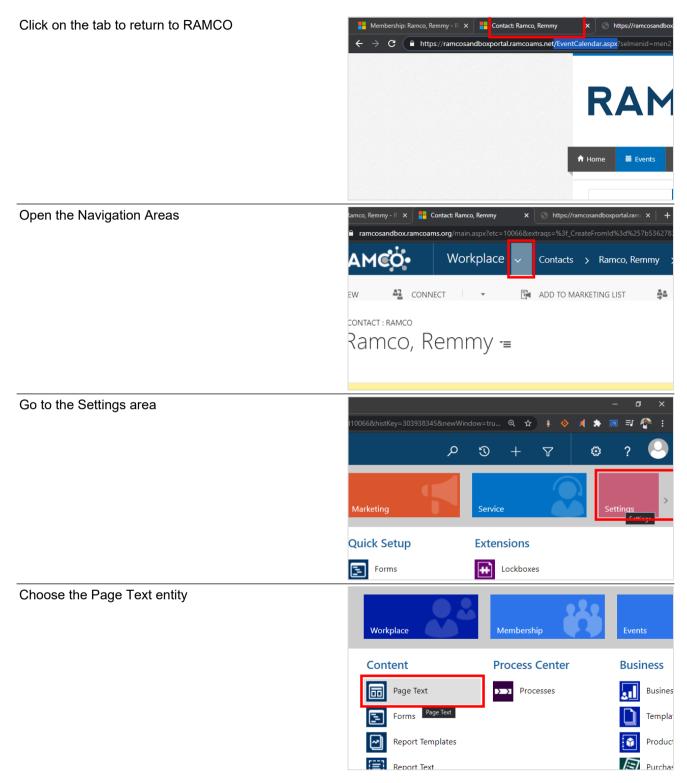
1.4. Page Text

1.4.1. Identify and Update Page Text on the Portal

Click on the command button MORE COMMANDS

Click on the command button MORE COMMANDS	– Ø X
	110066&histKey=303938345&newWindow=tru 🍳 🚖 🕴 🔶 🧍 🌧 🗊 🖅 😤 🗄
	• • • ■ ×
	RM PROCESS V 🗘 SHARE
	NRDS ID Primary Associ* Parent Customer*
Click on the command button Impersonate	Start Follow
	NRDS ID Primary & Run Workflow
	Word Templates
	🕑 Run Report 🔶
	🔱 Impersonate
	Impersonate Impersonate the current contact on the portal.
	Membership Application
	Store
Find the page on the portal where you want your new messaging to appear.	RAMCO
	↑ Home
	RAM: ^{Calendar} shboard
	Upcoming Classes You mus
	Upcoming Meetings
	My Classes
	Ye My Meetings re 30+ days old.
Click in the URL to highlight it.	Membership: Ramco, Remmy - R × I Contact: Ramco, Remmy × S thtps://ramcosandbox ← → C ramcosandboxportal.ramcoams.net/EventCalendar.aspx?selmenid=men2
Then copy a portion of the URL, from the first forward slash "/" all the way trough the ".aspx".	
Anything after the ".aspx" must not be copied.	RAM
Once you have the URL copied, we will use this to	
find this page text record in RAMCO.	Home Events







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.	
	Search for records
	Created On Modified On
	8/11/2017 12:51 8/11/2017 12:51
	t below. 8/11/2017 12:51 8/11/2017 12:51
	0/44/0047/42/54 0/44/0047/42/54
Click on the command button New	 Membership: Ramco, Remmy - R x Page Text Active Page Text - Mic x Https://ramcosandbox C C amacosandbox.ramcoams.org/main.aspx?etc=10066&extraqs=%3f_CreateFromIc
	FRAME Settings Page Text >
	+ NEW 🛅 DELETE - 🖘 EMAIL A LINK
	Searc Create a new Page Text record.
	Title 🔨 URL
Paste your URL in the URL field.	TEXT : RAMCO
Taste your once in the once held.	
	ew Page Text -≡
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Give your page a title. This will show as the title of the	
page tab.	TEXT : RAMCO
	ew Page Text -≡
	ew ruge lext =
	e Title
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Click on the command button Save			Page Text: New Page Text	× Shttps://ramcosandbox
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		- SAVE	& CLOSE 🕂 I	NEW 🔳 FORM EE
	PAGE TEXT - Deliver	is Page Text.		
	New P	age Tex	×t =	
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Then enter your desired messaging in the Text box.				
		PAGE TEXT		
		B I U abe	X ₂ X ² T _* T _* H1 _* T	v <u>t</u> e e e e
Click save to complete the process. This message will				
now show on this page of your member portal.				
	atus	Active		•
	atus Reason	Active		
				unsaved changes
	N 🔿		g ^e ^ 🥌	合 印 小 3:48 PM Save

1.5. Automation

1.5.1. Create an Alert (CRM or Portal)

Open the Navigation Areas

¢.	Sales & Accou	✓ Payments	>	Rothschild, David
V ACTIV	ATE <u> </u> Delete	ASSIGN		C SHARE
ild, Da	avid - \$22.0)() -≡		
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Choose the Settings Area	م	3 + 7	• ? 🕑
	Marketing	Service	Settings Settings
	Extensions	Store	Custom E-C
	refunded product	Store Locations	Web Eler
	Invoice Credits	Product Locations	Submissi
Click on the link Alerts	Page lext	Processes	Busines
	Report Templates		Product
	Report Text		Purchas
	Alerts Alerts		
Give your Alert a name.	ALERT : RAMCO New Alert -=		
	Name * Regarding Entity *	Select to enter data	
	Begin Date End Date		
	System Query Display in CRM No		
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".	alert:RAMCO New Alert :≡	& CLOSE 🕂 NEW 🍳	RAMCO ASSISTANT 📰
Some other entities, their may be a prefix in front of the name like "ramco_" or "cobalt_".	Name *		
If you are not sure what the entity name is, you can view it in the system customizations window under "Entities"	Begin Date ··· End Date ··· System Query ■ ·· Display in CRM No Display on Portal No Priority * ···		



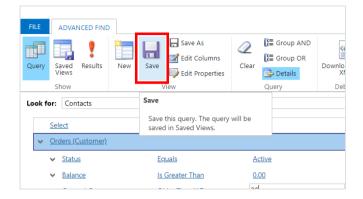
Set a date for when this Alert begins displaying. This field is required, and can be a date in the past if you like.	
You may also enter an End Date but that is not required.	ALERT TEXT B I U abe X, X S Select to enter data
Toggle whether this Alert should display in CRM?	Name* You have Unpaid Orders Regarding Entity* contact Begin Date 3/1/2021 End Date System Query Display in CRM No 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
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 Select to enter data



Click on the command button Save	FRAME Settings ~ Alerts >
	Save Save ALERT : RAM Save this Alert.
	New Alert -≡
	Name* You have Unpaid Orders Regarding Entity* contact Begin Date 3/1/2021
Click on the command button MORE COMMANDS	2 9 + 7 0 9
	ATES RUN REPORT RUN REPORT Created By Created On Lopez, Reggie Gra3/29/2021 11:45 AM Active
You must not set a Query for which records the ALERT will appear for.	ਸ਼ਾਸ਼ੂਸ਼ੁਸ਼ੁ≣≣≣≢≣■ਾ∾≡■®⊛ ੭ ৩ + ⊽ ☺ ? ◯
To do this, click on View Query to open an Advanced Find window.	ATES RUN REPORT View Query Form Editor Created By Created On Active
	Ⅲ• Ту ひょ ※ ※ ※ ※ ● ● ● ● ● ● ● ●
Make sure Details is enabled so that you can make changes to the Advanced Find	ND
	Image: Details XML View Query Debug Details XML Hide the query lines from view.



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



0 <u>۲</u>

Run a Dialog 1.5.2.

From any record in RAMCO, choose "Start Dialog" from the c

from the command bar.	9 Y + U 4
If you do not see that option, click the three dots to see more of the menu.	PROCESS - SEND EMAIL MORE COMMANDS
Click on the command button Start Dialog	GRE ClickDimensions Quick Send ■ Run Campaign Automation Share Share Secured Fields Follow Run Workflow Start Dialog Word T Start Dialog Word T Start Dialog Run Re Start e dialog for this Contact. A Impersonate Deactivation Wizard Process Payment
Choose a dialog from the list.	Look for Process Image: Show Only My Records Look in On Demand Dialogs Image: Search Image: Search Image: Search Process Name Created On Modified On Statu Image: Statu Process Name Created On Modified On Statu Image: Statu Uses Bill Relief Payment Plan 3/25/2021 9:48 3/25/2021 10:08 Activated Create - Add C5 Member Education 1/11/2019 9:52 1/11/2019 9:57 Activated



Click on the "Add" button to start the dialog, then follow the prompts of the dialog. 4 Þ 1 - 2 of 2 (1 selected) |∉ ∉ Page 1 ▶ Add <u>C</u>ancel Remove Value **BUSINESS DETAILS** POSTS Company * Enter a 🖴 01385866 - Forward Sunset Referral Broker Compliance call tr 1.5.3. **Run a Workflow** This Year's Members • Open the Record you wish to run a workflow on Last Name 🛧 First Name 🛧 Parent Customer Email Coldwell Banker Associated Ramco Remmy Remmy.Ramco@test.t Click on the command button MORE COMMANDS Q 3 ∇ ٢ ? а. $\mathbf{\Lambda}$ JL × RM PROCESS - O SHARE NRDS ID Owner* 876000124 SYSTEM Office Memberships + Click on the command button Run Workflow م 3 ∇ ٢ ? Τ ↓ E X PROCESS - 🦁 SHARE RM Share Secured Fields ☆ Follow 🔅 Run Workflow NRDS ID Owne 876000124 for this Account. of workflows in the Workflow tab of this re local Deactivation Wizard

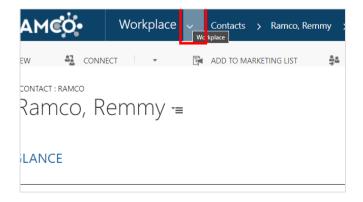
Office Memberships



Make sure you check the workflow you wish to run.		Search
		Process Name Cate
		Process Name Cate
		Set Contact GUID Work
		heckbox
		Test Service Provided Name Write Work
		Test - Copy lastname to middelname Worl
		Test - Multiple IF conditions in a series Work
		Email - Send and Example Workflow Work
	1	
Click on the button Add		ple IF conditions in a series Workflow 2/8/2021 4:01 PM 2/8/202
	Email - Send	d and Example Workflow Workflow 7/29/2020 12:05 7/29/202
	1 - 9 of 9 (1 sele	ected) 😽 🖣 Page 1 🖡
		Add Cancel Remove Valu
	Modified On	🗎 1/22/2021 10:48 AM
Then click OK to exit.		Look for Process V Show
		Look in On Demand Workflows
		Confirm Application of Workflov
		This workflow will be applied to 1 Contact.
	REALTORS F REALTORS	
	T REALFORG	You can monitor workflow jobs by opening each Contact and clicking W
		Are you sure that you want to continue?
		_

1.5.4. Set up a process

Open the Navigation Areas





Choose the Settings Area	P 10 + 7 10 ? 😔
	Marketing Service Settings
	Quick Setup Extensions
	Forms Lockboxes
	Page Text Keys
Choose the "Processes" entity	Workplace Membership Events
	Content Process Center Business
	Page Text Processes Busines
	Forms Processes Templa
	Report Templates Produc
	Report Text Purcha
Click on the link New	FRAME Settings Processes >
	🛥 My Processes 🖌
	🚼 New 🛛 🖳 🗐 🝰 🗙 💭 Activate 🔘 Deactivate 🛛 More Actions 🔹
	✓ Process Name ↑ Category
	Clone Product Workflow
	Create - Members Only Registration Fee for New Member Workflow Create Class Registration Workflow
	Email - Invoice Reminder Workflow
	Email Walcome Letter Workflow
Give the Process a name	
	Create Process Define a new process, or create one from an existing template. You can create four kinds of processes actions, dialogs, and workflows.
	Process name: *
	Category: * Entity: *
	Type: O New blank process New process from an existing template (select from list):
	Template Name 🛧 Primary Entity

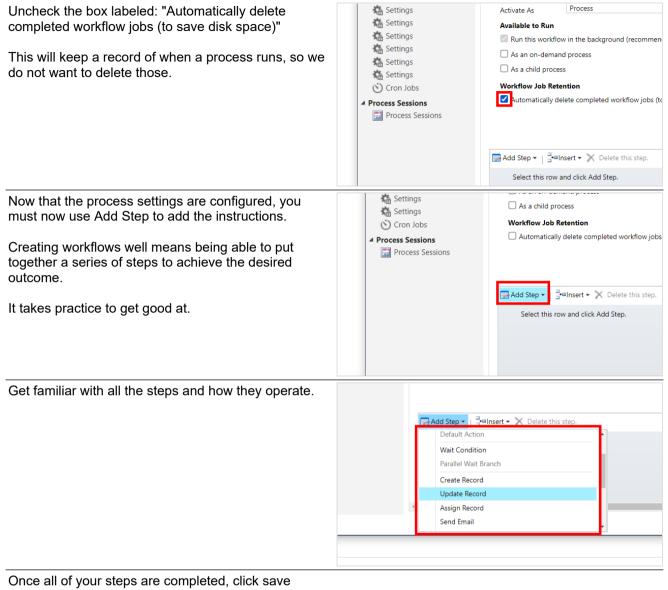


On the Category Menu		
	Category	and the second se
		Create Process
	Workflow	Define a new process, or create one from an existing template. You can c actions, dialogs, and workflows.
	Workflow	
	lica Workflow	Process name: * Name
		Category: * 🗸 Ent
		Type: View blank process New process from an existing template (select
		Template Name 🛧 Prima
Choose Workflow from the list.	Category	
	Workflow	Create Process
		Define a new process, or create one from an existing template. You can cr actions, dialogs, and workflows.
	Workflow	
	ica Workflow	Process name: * Name
		Category: * Enti
		Terr
		Type: Action inplate (select Business Process Flow
		Disiness Flow
		Template Name Workflow Prima
Open the Entity menu		
	from an existing template.	. You can create four kinds of processes: business process flows,
	~	Entity: * 🗸 🗸 🗸
	ound (recommended)	
	<pre>c process</pre>	
	ess from an existing templ	late (select from list):
		Primary Entity Owner
Choose the entity for the process. Once chosen, the		
entity cannot be change, and the process will only		
work for that entity	~	Entity: *
	ound (recommended)	Account
	c process	ate (select from list): Account t Accounting Export File Transformation
	ess from an existing templa	Address
		Alert Primary Entity Announcement
		Amoncement
		Appointment Article
		No process teir Article Comment
		Article Template
		Association Auto Number Definition



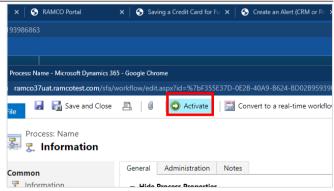
Click on the button OK		_	, H ∢ Page 1 ► OK Cancel
Open the Scope menu	nmended)	Entity Category Options for A i Scope Start when:	Account Workflow tomatic Processes User
Salaat a aaana farikia musaaaa	ibs (to save disk space)		Record is assigned Record fields change Record is deleted
Select a scope for this process. The scope determines who is allowed to use this process.	nmended) ibs (to save disk space)	Entity Category Options for Au Scope Start when:	Account Workflow utomatic Processes User User User Business Unit Parent: Child Business Units Organization Record fields change Select Record is deleted
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.	nmended)	Entity Category Options for A t Scope Start when:	Account Workflow utomatic Processes Organization Crganization Record is created Record is assigned Record fields change Select Record is deleted





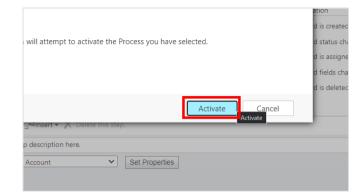
Once saved, the workflow is in draft mode until it is activated.

Workflows only work when they are activated.





Click activate again to confirm activation.



2. Accounting

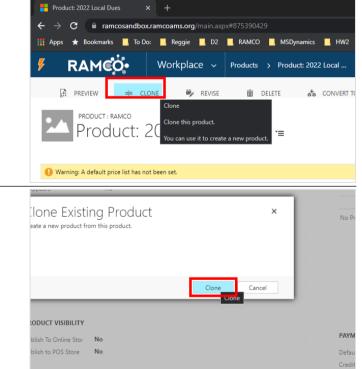
Click on the button Clone

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 Close	Outlook, or verify with your system administrator that server- le synchronization or the Email Router is set up to send messages you. For more information about email configuration, see online ip.
RAMCO will add a timestamp to the name, you simply need to update the name, then the product ID.	Product: 2022 Local Dues-202109161306
	UMMARY me 2022 Local Dues-202109161306546046 duct ID 2022 Local Dues-202109161306546046 CU22 L 2022 Local Dues-202109161306546046 Default Unit Eault Unit Primary Unit cimals Supported 2 Price
Click on the Product ID field to update it as well.	
	Warning: A default price list has not been set. UMMARY me 2023 Local Dues duct ID 2022 Local Dues Example-202109161306546046 t Group Default Unit Default Unit Primary Unit cimals Supported 2 Price
Click on the save icon to update the product.	PAYMENT SETTINGS
Please note, cloning a product does not clone the price list items or the product gl accounts. Those still need to be created.	Default Price List * Credit Application Priority Remittance Application O 1,053
The next steps will go through that process.	
	atus Active atus Reason Active
	unsaved changes 🖬 🥚 81°F Sunny 🔨 🔩 🛥 🥥 45⁄2 (4)) 12:07 PM 🛛 Save



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.	ercentage		+ 🗉	PRODUCT GL ACCO Product 个 No Product GL Acco	
Click on the field "Price List" to choose a list.	SAVE	SAVE & CLOSE	+ NEW	FORM EDITO	R
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.		product price list DCal DU '≡			
	Price List * Product * Unit *	 2022 Local Dues Primary Unit		٩	Currency Discount List Quantity Selling
	Pricing Pricing Method*	Currency Amount			
Click on the lookup item Member		price list item : prod 2022 LOC		Έ	
		▲ General			
		Price List * Product * Unit *	US Dollar		Q
	QUIRED)	Pricing Pricing Method * Amount *	2 results Currency Amoun		
Click on the field "Amount" to set a price people on this list would pay.	Price List * Product * Unit *	Member 2022 Local Dues Primary Unit			Currency Discount List Quantity Selling
	Pricing Pricing Method [*] Amount [*] Percentage	Currency Amount			
	Rounding				



Click "Save & Close" to complete this price list item.	REVISE	面 delete 💑 convertito kit 🚦 process 👻 🖚 em
RAMCO may take a moment to complete this, so be patient.		Price List Item: 2022 Local Dues - Microsoft Dynamics 365 - Google Chrome
	2 Local D	RAMCO 2022 Local Dues
	t.	🔒 SAVE 🛱 SAVE & CLOSE 🕂 NEW 💷
		2022 Local Du=
		✓ General
To add another price list item, click on the plus symbol again.		
		PRODUCT GL ACCOUNT (REQUIRED)
	ercentage	Froduct ↑
		No Product GL Account records found.
		SAVE & CLOSE + NEW FORM EDITOR
Click on "Price List" to choose the next one list.	SAVE	🛱 SAVE & CLOSE 🕂 NEW 🔳 FORM EDITOR
Click on "Price List" to choose the next one list.	PRICE LIST ITEM : P	
Click on "Price List" to choose the next one list.	PRICE LIST ITEM : P	PRODUCT PRICE LIST
Click on "Price List" to choose the next one list.	PRICE LIST ITEM : P 2022 LC • General Price List*	PRODUCT PRICE LIST DCAI DU ™ ₽ Currency
Click on "Price List" to choose the next one list.	PRICE LIST ITEM : P 2022 LC General	product price list DCal Du י≡
Click on "Price List" to choose the next one list.	PRICE LIST ITEM : P 2022 LC • General Price List * Product • Unit *	PRODUCT PRICE LIST DCAI DU = Currency ZUZZ Local Dues
	PRICE LIST ITEM : P 2022 LC • General Price List * Product •	PRODUCT PRICE LIST DCAI DU = Currency ZUZZ Local Dues
Click on "Price List" to choose the next one list.	PRICE LIST ITEM : P 2022 LC - General Price List * Product * Unit *	PRODUCT PRICE LIST DCAI DU = Currency ZUZZ Local Dues Primary Unit Quantity Selling
	PRICE LIST ITEM : P 2022 LC - General Price List * Product * Unit *	PRODUCT PRICE LIST DCAI DU *= Currency ZUZZ LOCAT Dues Primary Unit Currency Amount
	PRICE LIST ITEM : P 2022 LC - General Price List * Product * Unit *	PRODUCT PRICE LIST DCAI DU "= Currency ZV22 Local Dues Primary Unit Currency Amount Currency Amount 2022 LOCAI DU "=
	PRICE LIST ITEM : P 2022 LC - General Price List * Product * Unit *	PRODUCT PRICE LIST DCal DU "= Currency ZU22 Local Dues Primary Unit Currency Amount Currency Amount 2022 LOCAL DU "= "General Price List"
	PRICE LIST ITEM : P 2022 LC - General Price List * Product * Unit * Pricing Pricing Method *	PRODUCT PRICE LIST DCal DU "≡ 2022 Local Dues Primary Unit Currency Quantity Selling Currency Amount Currency Amount 2022 LOCAI DU "≡ • General Price List" Product" 2022 Local Dues
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Click on Amount to set the price for this list.		ency ount List ntity Selling
	Pricing Pricing Method * Currency Amount Amount * Percentage I Select to enter data	
	Rounding	
Click "Save & Close" to complete this price list item.	🖗 REVISE 💼 DELETE 🦽 CONVERT TO KIT 🚦 PROCESS 💌	ලා FM
RAMCO may take a moment to complete this, so be patient.	2 Local Dues RAMEO 2022 Local Dues 2022 Loc	hrome
	t. SAVE SAVE & CLOSE + NEW Save & Close PRICE LIST ITEM : PRODUCT PRIC 2022 LOCAL DU '= • General	
For bookkeeping purposes, RAMCO needs to know where to report revenue when a product is sold.	Credit Application Priority Remittance Application O 1,053	
To do this you must add a "product gl account".		
Click on the plus symbol to add one.		1 🖩
	General Ledger Accoun Type Add Product GL Accou	int record.
Click on the search button of field GL Account	anco SUCT GL ACC '≡	
	2022 Local Dues -	



Choose the correct GL account for this product from the list.		Product	
If you are not sure which to choose, please confer with your bookkeeper.		GL Accou Type *	unt AR - Assoc Receivables AR - MLS Receivables Revenue Revenue Bakery Cash Cash Receivables Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Cash Revenue Revenue Cash Revenue Revenue Cash Revenue Revenue Cash Revenue Revenue Cash Revenue Re
Click on the command button Save & Close	ns.org/main.aspx keggie D2 kplace v % REVISE 2 LOCA	RAMCO Products	Product GL Account: New Product GL Account - Google Chrome ramcosandbox.ramcoams.org/main.aspx?etc=10066&extraqs=%3f New Product GL Acc Save Save & Close PRODUCT GL ACCOUNT : RAMCO New Product GL Account Save & Close Save

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"

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

Warning: A default price I	st has not been set.	
UMMARY		
me*	For Sale Sign - Large	
duct ID*	For Sale Sign - Large	
t Group *	Default Unit	
ault Unit *	Primary Unit	
cimals Supported *	2	
Price		
	-	
	et tot sale sign - Large -	
11000	5 5	
11000	5 5	
Warning: A default price	5 5	
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Warning: A default price I	5 5	
Warning: A default price UMMARY me*	st has not been set.	
Warning: A default price UMMARY me* iduct ID*	ist has not been set.	
Warning: A default price I UMMARY me * rduct ID * it Group *	st has not been set.	
_	st has not been set.	



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 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.	ercentage Product GL ACCOUNT (REQUIRED) Product 个 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* I 10/30 Class Registration Fee Discount List Unit* Primary Unit Quantity Selling Pricing Pricing Pricing Pricing Method* Currency Amount



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	
	QUIRED)	Price List * Product * US Dollar US Dollar US Dollar US Dollar	Q
	Pricing Metho	Pricing 2 results 2 results 4 Amount 4 Amount 4 4 Amount 5 5 5 5 5 5 5 5	
Click on the field amount, then set the price a member would pay.	Price List * Product * Unit *	Member Currency 10/30 Class Registration Fee Discount Li Primary Unit Quantity Se	
	Pricing Pricing Method * Amount * Percentage	Currency Amount	
	Rounding		
Click "Save & Close" to create the price list item.	REVISE	🔟 DELETE 💑 CONVERT TO KIT 🚦 PROCESS 👻 🖚	EN
This sets the price for members, now we must create another price list item with the price a nonmember would pay.	Sale Sign	Price List Item: 10/30 Class Registration Fee - Microsoft Dynamics 365 - Goo. a ramcosandbox.ramcoams.org/main.aspx?etc=1026&extraqs=%3 FRAMCO 10/30 Class Registrat	
	t.	🕞 SAVE 🛱 SAVE & CLOSE 🕂 NEW	-8
	2e	price list item : product price list 10/30 Class Re=	
		▲ General	
Click on the link Add Price List Item record.	ercentage	PRODUCT GL ACCOUNT (REQUIR	



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 * Product * Unit *	Currency 10/30 Class Registration Fee Select a value, int List Primary Unit Quantity Sellin	
	Pricing Pricing Method *	Currency Amount	
Click on the lookup item Non-Member		10/30 Class Re=	
		General Price List*	
	QUIRED)	Product * Unit * Us Dollar Unit * If Non-Member US Dollar US DOLLA	
	Pricing Metho Currency Amount	Pricing 2 results Pricing Method* Currency Amount Amount* Percentage	
		Nee Montes C	
Click in the Amount field, then set the nonmember price.	Price List * Product * Unit *	Non-Member Currency 10/30 Class Registration Fee Discount List Primary Unit Quantity Selling	
	Product*	10/30 Class Registration Fee Discount List	
	Product * Unit * Pricing Pricing Method * Amount *	10/30 Class Registration Fee Discourt List Primary Unit Quantity Sellin	
	Product * Unit * Pricing Method * Amount * Percentage Rounding	10/30 Class Registration Fee Discount List Primary Unit Quantity Selling	
price.	Product * Unit * Pricing Pricing Method * Amount * Percentage	10/30 Class Registration Fee Primary Unit Currency Amount □ □ □ □ □ □ □ □ □ □ □ □ □	
price.	Product* Unit* Pricing Method* Amount* Percentage Rounding	10/30 Class Registration Fee Discount List Primary Unit Quantity Selling Currency Amount Image: Currency Amount Image: Delete Image: Convert TO KIT Image: PROCESS Image: Convert TO KIT Image: Delete Image: Convert TO KIT Image: Proce List Item: 10/30 Class Registration Fee - Microsoft Dynamics 365 - Google Image: Imag	



For bookkeeping purposes, RAMCO needs to know where to report revenue when a product is sold.	Credit Application Priority Remittance Application O 1.053
To do this you must add a "product gl account".	
Click on the plus symbol to add one.	
	General Ledger Accoun Type Add Product GL Account record.
Click on the search button of field GL Account	SAVE & CLOSE + NEW FORM EDITOR
	uct GL Acc =
	2022 Local Dues ₽
Choose the correct GL account for this product from the list.	Product* 2022 Local Dues
If you are not sure which to choose, please confer with your bookkeeper.	GL Account * Type * GL Account * Type * AR - Assoc Receivables Assoc Dues Revenue Bakery Cash Oli00 Receivables Birthday Ticket Sales Revenue Cash Revenue Cash R
Click on the command button Save & Close	
	ms.org/main.aspx#875390429 Product GL Account: New Product GL Account - Google Chrome eggie D2 RAMCO arrancosandbox.ramcoams.org/main.aspx?etc=10066&extraqs=%3f_
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	REVISE TO DE SAVE SAVE & CLOSE + NEW I
	2 Local Dues PRODUCT GLACCOUNT: RAMCO New Product GLACCOUNT GLACCOUNT: RAMCO Save and close this Product GLACCOUNT: RAMCO
	t Product* 2022 Local Dues GL Account * Assoc Dues



2.1.3. Create a Product (For Dues)

Open the Navigation Areas	Accounts Active Accounts - Micro X +
	→ C aramcosandbox.ramcoams.org/main.aspx#470815183
	Apps ★ Bookmarks 📕 To Do: 📕 Reggie 📕 D2 📕 RAMCO 📕 MSDynamics 📕 HW2 📕
	RAMCO Workplace v Accounts >
	+ NEW 💼 DELETE - 🖘 EMAILA LINK - 💽 RUN REPORT
	 Active Accounts ~
	✓ Account Name ↑ NRDS ID License Number Email Main Phone Str
	1031 Asset Exchange 876000299 509-457-0788 Yak 2677 Test office 123453233 111-222-3336 Ale
Choose the Sales & Accounting area	
······································	org/main.aspx#470815183
	jie 📙 D2 📕 RAMCO 📕 MSDynamics 📕 HW2 📕 School 📕 Dev Projects 📕 Work 📥 Prim
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	s Bulk Profile Charges Products GL Accounts
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	ents 😥 Scheduled Payments 🔠 Tax Tables 💰 Bank Accoun
	e Payments Scheduled Payment D 🔣 GL Account Categories 🤜 Revenue Rec
Click on the command button Add Product	de Durchese Ordere The Association of
	← → C in ramcosandbox.ramcoams.org/main.aspx#656395613
	🏢 Apps ★ Bookmarks 📕 To Do: 📕 Reggie 📕 D2 📕 RAMCO 📕 MSDynamics 📕 HW2
	FRAME Sales & Accou ~ Products >
	[골 ADD FAMILY : 章 ADD PRODUCT : 章 ADD BUNDLE 亩 DELETE
	Add Product Add Product Add Product. If you select an existing product family i selected product family.
	✓ Name ↑ Product ID List Price Status Publ
	1 Year Legal Hotline Subscription 1 Year Legal Hotline S S200.00 Active No
	10 Pack (10% Off) 10PCK \$300.00 Active No



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.	Product: RAMCO Product: =
For example, "2022 Local Dues".	UMMARY
This will make it easy to tell the difference when charging for the next year dues, which the member is paying.	me * vduct ID * fault Unit * cimals 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	Warning: A default price list has not been set.
	me * 2022 Local Dues duct ID * 2022 Local Dues Example it Group * Detault Unit fault Unit * Primary Unit cimals Supported * 2 Price
Click on the search button of field Unit Group	ss SALES TAX, SHIPPING & QUANTITY res Example No Taxable No Taxable ■ Minimum Quantity Quantity On Hand ■ Prevent Back Order No Current Cost Average Cost ■
Click on the lookup item Default Unit	AMARY 2022 Local Dues 2022 Local Dues 2022 Local Dues Example 202 Unit * Init * I Cook U Default Unit Look U Default Unit 1 result ayment Type



Click on the search button of field Default Unit			
	es Es Example		SALES TAX, SHIPPING & QUANTITY Shippable No
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			Prevent Back Order No Current Cost
			Average Cost 🔒
			Total Cost of Inventory
Click on the lookup item Primary Unit			
	1MARY		
		2022 Local Dues	
	: ID *	2022 Local Dues Example Default Unit	
	oup * Unit *		٥
	Is Supported *	Primary Unit	
		Look Up More Records	
		1 result	
	ayment Type		
	: Type Sales In	ventory	
Set the decimals supported to "2"			
	UMMARY		
	me*	2022 Local Dues	
	iduct ID*	2022 Local Dues Example	
	it Group * fault Unit *	Default Unit Primary Unit	
	cimals Supported *		
	: Price	Select to enter data	
	DS Payment Type		
		es Inventory	
Click on the picklist Product Type	Default Unit *	Primary Unit	
	Decimals Supported List Price	2	
	NRDS Payment Type		
	Product Type	Sales Inventory	
	Category		



RAM	CO	Portal
	~ ~	

Click on the picklist Product Type value Dues	Decimals Supported * List Price	2			
	NRDS Payment Type Product Type Category	Mancharchin Application Dues Mietin Dues tration Fee Meeting Activity Fee			
Click save to create the product.	Product: New Produ			5200 (20	
Products in RAMCO do not work on their own, they require some additional records to determine price and revenue tracking.	← → C ■ □ ∴ Apps ★ Bookma ✓ RAM		jie <mark>,</mark> D2 , R	AMCO MSDynar	nics <mark>,</mark> HW2
We will create those next.	Save	ばう SAVE & CLOSE	B DEACTIVATI	ON WIZARD	FORM EDITOR
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 ACCO	UNT (REQUIRED)
			+	TRODUCT OF ACCO	
	ercentage			Product ↑	
				No Product GL Acco	unt records found.
Click on the field "Price List" to choose a list.	SAVE	😭 SAVE & CLOSE	+ NEW	FORM EDITOR	
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 : PF 2022 LO General	RODUCT PRICE LIST CAI DU ™≡			
	Price List * Product * Unit *	2022 Local Dues Primary Unit		٩	Currency Discount List Quantity Selling
	Pricing				
	Pricing Method *	Currency Amount			



Click on the lookup item Member	QUIRED) Price List * Product * Unit *	PRICE LIST ITEM : PROC 2022 LOC • General Price List* Product* Unit* Pricing Pricing Method* Amount* Member 2022 Local Dues Primary Unit	
	Pricing Pricing Method * Amount * Percentage Rounding	Currency Amount	
Click "Save & Close" to complete this price list item.			
RAMCO may take a moment to complete this, so be patient.	REVISE 2 Local D	Price List Item: 2 ramcosandbo RAA	Save & Close M : PRODUCT PRIC
To add another price list item, click on the plus symbol again.	ercentage		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	1
	2022 Lo	ocal Du≡			
	▲General				
	Price List			Q	Currency
	Product * Unit *	2022 Local Dues Primary Unit			Discount List Quantity Selling
	Pricing				
	Pricing Method *	Currency Amount			
Click on the lookup item Non-Member		2022 Loc	al Du	≡	
		 General 			
		Price List * Product *	Member US Dollar		Q
		Unit *	US Dollar Non-Member US Dollar		
			Look Up More	Records	
		Pricing	2 results		
	QUIRED)	Pricing Method* Amount*	Currency Amount		
		Percentage	□		
Click on Amount to set the price for this list.	Price List *	Non-Member 2022 Local Dues			Currency Discount List
	Unit *	Primary Unit			Quantity Selling
	Pricing				
	Pricing Method * Amount *	Currency Amount			
	Percentage	Select to en	ter data		
	Rounding				
Click "Save & Close" to complete this price list item.					
Click Save & Close to complete this price list term.	REVISE	🛅 DELETE 💑 C	ONVERT TO KIT	PROCESS -	ස EN
RAMCO may take a moment to complete this, so be		Price List Item: 20	022 Local Dues - Micro	soft Dynamics 365 - Go	oogle Chrome
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			M : PRODUCT PRIC	ave & Close ave and close this Price	List Item
		2022 I	Local D		
		- General			



For bookkeeping purposes, RAMCO needs to know where to report revenue when a product is sold.	Credit Application Priority Remittance Application O 1.053
To do this you must add a "product gl account".	
Click on the plus symbol to add one.	
	General Ledger Accoun Type Add Product GL Account record.
Click on the search button of field GL Account	SAVE & CLOSE + NEW FORM EDITOR
	uct GL Acc =
	2022 Local Dues ₽
Choose the correct GL account for this product from the list.	Product* 2022 Local Dues
If you are not sure which to choose, please confer with your bookkeeper.	GL Account * Type * GL Account * Type * AR - Assoc Receivables Assoc Dues Revenue Bakery Cash Oli00 Receivables Birthday Ticket Sales Revenue Cash Revenue Cash R
Click on the command button Save & Close	
	ms.org/main.aspx#875390429 Product GL Account: New Product GL Account - Google Chrome eggie D2 RAMCO arrancosandbox.ramcoams.org/main.aspx?etc=10066&extraqs=%3f_
	kplace v Products F RAMCO New Product GL Acc
	REVISE TO DE SAVE SAVE & CLOSE + NEW I
	2 Local Dues PRODUCT GLACCOUNT: RAMCO New Product GLACCOUNT GLACCOUNT: RAMCO Save and close this Product GLACCOUNT: RAMCO
	t Product* 2022 Local Dues GL Account * Assoc Dues



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

Click on the navigation button Products	duct: 2023 Local Dues × +
	C a ramcosandbox.ramcoams.org/main.aspx#640613709
	🛨 Bookmanks 📕 To Do: 📃 Reggie 📕 D2 📕 RAMCO 📕 MSDynamics 📕 HW2 📕 Schoo
	RAMCO Workplace v Products > Product: 2022 Local >
	🖗 PREVIEW 🕫 CLONE 🆻 REVISE 🛅 DELETE 💑 CONVERT TO KIT
	PRODUCT: RAMCO Product: 2022 Local Dues-2021091613065
	arning: A default price list has not been set.
Click on the field "Name" and give the product a name.	Product: For Sale Sign - Large =
	Warning: A default price list has not been set.
	UMMARY
	me* For Sale Sign - Large
	it Group * Default Unit
	fault Unit * Primary Unit cimals Supported * 2
	cimals 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: -=
	UMMARY
	me * For Sale Sign - Large
	duct ID *
	fault Unit *
	cimals Supported * : Price
Click on the picklist Product Type	Default Unit *
	Decimals Supported * List Price
	NRDS Payment Type
	Product Type Sales Inventory Category
	L



Choose the product type "Sales Inventory"	List Price		
Warning: Do not use "Sales Inventory" for anything other than store items. If you use it for other kinds of	NRDS Payment Type		
sales like sponsorships or dues, RAMCO may stop	Product Type	Membership Application	
you from being able to process payments for this	Category	Dues	-
product.		Sales Inventory Weeding 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".			
	SALES TAX, SHIPPING	A QUANTITY	
RAMCO does not calculate shipping costs, the reason	Shippable	No	
this needs to be turned on, is so the member can	Taxable	No No	
choose whether which office they want to pick up their	Tax Table	A	
purchase. If you only have one office location, then	Minimum Quantity	-	
this does not matter.	Quantity On Hand	■	
	Prevent Back Order Current Cost	No	
	Average Cost	A	
	Total Cost of Inventory		
In order for RAMCO to charge tax on a store sales, this must be set to yes. If this item is taxable, you must select a tax table. Tax tables contain the zip code for your office and the	SALES TAX, SHIPPING Shippable Taxable Tax Table Minimum Quantity Quantity On Hand Prevent Back Order Current Cost Average Cost Total Cost of Inventory	Yes No No No 	
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 recor	rd.



Choose a tax table.	Shippable Yes Taxable Yes Tax Table Yes Tax Table IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	To To + New PAN Def
The "Online Store" allows members to purchase store items from the portal, without the help of a staff person.	Publish to POS store No Minimum Quantity Quantity On Hand Prevent Back Order No Current Cost Average Cost Total Cost of Inventory PRODUCT VISIBILITY Publish To Online Store No Publish to POS Store No	Det
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 VISIBILIT Y Publish To Online Star Publish to POS Store No	
Click on the search button of field Unit Group	Large Large	SALES TAX, SHIPPING & QUANTITY Shippable Yes Taxable 27513 Minimum Quantity Quantity On Hand □ Prevent Back Order No Current Cost Average Cost □



Click on the lookup item Default Unit	-		
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		For Sale Sign - Large	
	: ID*	For Sale Sign - Large	
	oup* Unit*	😘 Default Unit	٩
	Is Supported *	Look Up More Records	
	e	-	
		1 result	
	'ayment Type		
Click on the search button of field Default Unit			
	Large		SALES TAX, SHIPPING & QUANTITY
	Large		Shippable Yes
		٩	Taxable Yes
			Tax Table 27513 Minimum Quantity
			Quantity On Hand
			Prevent Back Order No
			Current Cost
			Average Cost 🔒 Total Cost of Inventory
			Initial Cost of Inventory
Click on the lookup item Primary Unit			
	IMARY		
	: ID*	For Sale Sign - Large For Sale Sign - Large	
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	Is Supported *	🗧 Primary Unit	
	e	Look Up More Records	
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Set decimals supported to 2.			
	UMMARY		
	me*	For Sale Sign - Large	
	iduct ID*	For Sale Sign - Large	
	it Group * fault Unit *	Default Unit Primary Unit	
	cimals Supported *		
	^{: P} You must provide a valu		
	DS Payment Type		
	DS Payment Type		



Click Save to create product.	Product: New Product X +
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.	 ← → C ← → C ← → → C ← → → → → → → → → → → → → → → → → → → →
We will set the inventory for those locations next.	Product: ramco Product: =
	- SUMMARY
Expand the associated view of product store locations.	PRODUCT LOCATIONS
	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 LC CHART PANE Name Name Product Quantity on H Alternate Store Location - For Sale Sign - Large or Sale Sign - Large 0 Default Store Location - For Sale Sign - Large or Sale Sign - Large 0
Set the inventory of this product for this location.	+ NEW & DEACTIVATE DELETE & ASSIGN SHARE PRODUCT LOCATION : RAMCO Default Store Location - For Sale Sign - L Product* Quantity on Hand* Store Location Default Store Location



Click Save to update.	atus Active atus Reason Active
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.	● 81°F Sunny ~ (1222 PM Save
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.	$ \begin{array}{c c c c c c c c c c c c c c c c c c c $



Click on the field "Price List" to choose a list.	, SAVE	SAVE & CLOSE	+ NEW	FORM EDITOR	t
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.		PRODUCT PRICE LIST DCAI DU ™≡			
	Price List * Product * Unit *	 2022 Local Dues Primary Unit		Q	Currency Discount List Quantity Selling
	Pricing Pricing Method *	Currency Amount			
Click on the lookup item Member		PRICE LIST ITEM : PROD		=	
		General Price List * Product * Unit *	Member US Dollar		٩
	QUIRED)	Pricing Pricing Method * Amount *	Look Up More 2 results Currency Amount		
Click on the field "Amount" to set a price people on this list would pay.	Price List * Product * Unit *	Member 2022 Local Dues Primary Unit			Currency Discount List Quantity Selling
	Pricing Pricing Method * Amount * Percentage	Currency Amount			
	Rounding				
Click "Save & Close" to complete this price list item.	🗭 REVISE	💼 delete 💑 co	DNVERT TO KIT	₽ PROCESS ▼	ස Elv
RAMCO may take a moment to complete this, so be patient.	2 Local D	Price List Item: 20	22 Local Dues - Micro x.ramcoams.org/m	osoft Dynamics 365 - Go nain.aspx?etc=10268 2022 Local Dues	oogle Chrome
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To add another price list item, click on the plus symbol again.					
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				No Product GL Acco	ount records found.
Click on "Price List" to choose the next one list.	SAVE	SAVE & CLOSE	+ NEW	B FORM EDITOR	3
		PRODUCT PRICE LIST DCAI DU "≡			
	 General 				
	Price List*			Q	Currency
	Product * Unit *	2022 Local Dues Primary Unit			Discount List Quantity Selling
	Pricing				
	Pricing Method *	Currency Amount			
Click on the lookup item Non-Member		2022 Loc	al Du	=	
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		Price List *			٩
		Product* Unit*	2022 Local Dues		
		onic	, initially office		
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	QUIRED)	Pricing Method* Amount*	Currency Amount	t	
		Percentage	₽		
Click on Amount to set the price for this list.	Price List Product*	Non-Member 2022 Local Dues			Currency Discount List
	Unit *	Primary Unit			Quantity Selling
	Pricing Pricing Method *	Currency Amount			
	Amount * Percentage	Select to en	iter data		
	Rounding				



Click "Save & Close" to complete this price list item.	🖗 REVISE 💼 DELETE 💑 CONVERT TO KIT 📱 PROCESS 🔻 🖘 EN
RAMCO may take a moment to complete this, so be patient.	2 LOCAL DUCE Price List Item: 2022 Local Duces - Microsoft Dynamics 365 - Google Chrome ramcosandbox.ramcoams.org/main.aspx?etc=1026&extraqs=%3f_C RAMCOC 2022 Local Duces
	t SAVE SAVE ACCLOSE + NEW SAVE & CLOSE + NEW SAVE &
For bookkeeping purposes, RAMCO needs to know where to report revenue when a product is sold.	Credit Application Priority Remittance Application O 1,053
To do this you must add a "product gl account".	
Click on the plus symbol to add one.	+
	General Ledger Accoun Type Add Product GL Account record.
Click on the search button of field GL Account	SAVE & CLOSE + NEW IF FORM EDITOR RAMCO DUCT GL ACC= 2022 Local Dues
Choose the correct GL account for this product from the list.	Product* 2022 Local Dues
If you are not sure which to choose, please confer with your bookkeeper.	Type * Type * AR - Assoc Receivables AR - MLS Receivables Assoc Dues Revenue Bakery Cash Assoc Dues Revenue Bakery Cash Bakery Cash Bakery Cash Bakery Cash Receivables O1000 Revenue Cash Revenue Ca



Click on the command button Save & Close

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t.		Product* GL Account*		2 Local Dues		

2.1.5. Create a Purchase Order

Open the Navigation Areas	Produ: X Product GL Account: New Produ: X + sandbox:ram.coams.org/main.aspx#905453207 Sales & Accou Products > Product: Cape Fear ales & Accounting plp CLONE REVISE RETIRE DELETE :: RAMCO duct: Cape Fear Demo Product =
Choose the Purchase Orders entity.	Sales Accounting
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	Credits
Click New to start a new record.	Purchase Orders All Purchase Orc X
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	PO10006 4/24/2020 Vendor 01



Set the date the purchas order was made.	e Order ·	·=	
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Click on the lookup Vendor	ew Purci	lase order .≡	
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Click save to create the Purchase Order.	🗧 📒 Purch	hase Order: New Purchase 🔿 🗙 🚦 Product GL Account: New Produc 🗙 📔 🕂
Now a Purchase Order Item must be created for each item in your order.	← →	C ramcosandbox.ramcoams.org/main.aspx#235163169 RAMCO Sales & Accou Purchase C
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To add a Purchase Order Item, click on the plus icon.		
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Click on the lookup Product		
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	ocution	Current Cost 🔒
Choose a product to add.		
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		Quantity Ordered * 10 Pack (10% Off) 10PCK \$300.00
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Click on the field Quantity Ordered		
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Click Save and Close to complete the process.	rt GL Account: New g/main.aspx#23 Sales & A E	IS163169 Purchase Order Item: New Purchase Order Item - Google Chrome Image: State of the image of the imag

2.1.6. Create Coupon (Discounts a dollar amount)

Open the navigation areas

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Choose the Sales and Accounting module	Contacts >			
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	+ NEW	DELETE	- email a	LINK
	New Activ Create	a new Coupon record. 🗸		
	Name 个	Type ↑	Code	e P

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.

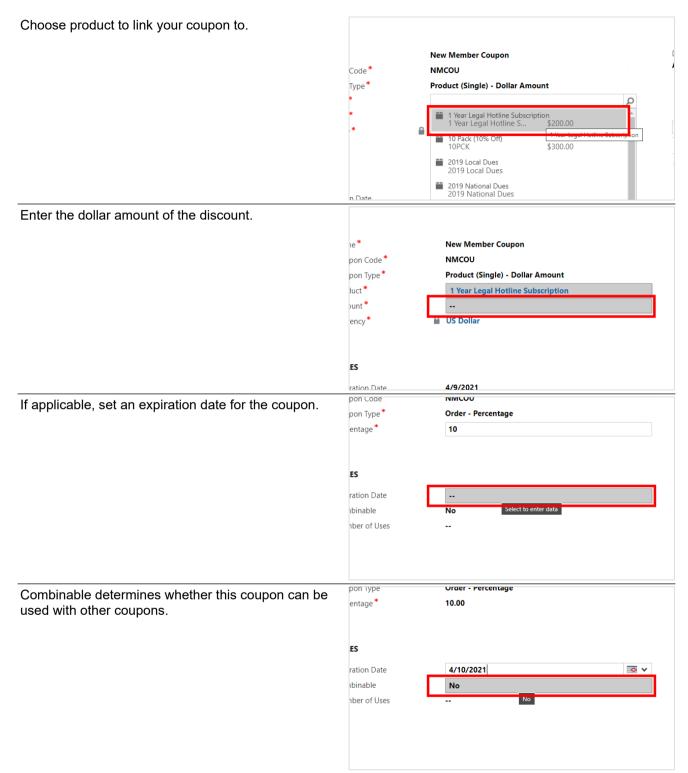
Enter a name for the coupon

D SAVE	B SAVE & CLUSE	T INEVV	 PORIVI EDITOR
PON : RAMCO			
ew Cou	non -		
1e *			
pon Code *		Ocicer to enter data	
pon Type *			
ES			



Then enter a code. This is the code that staff or the member will use to apply the discount.	PON : RAMCO				
······································					
	ew Coupon ≔				
	ne*	New Member Coupon			
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Choose a product single or product all dollar amount					
	v Coup	ion =			
		New Member Course			
	Code *	New Member Coupon			
	Type*	Order - Percentage			
		Product (Single) – Deller Amagint Product (Single) – Percentage			
		Product (All) - Dollar Amount Product (All) - Percentage			
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	n Date				
For coupons linked to specific product, you must link that product					
	1e*	New Member Coupon			
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	pon Type *	Product (Single) - Dollar Amount			
	luct*	۹			
	ount*	 US Dollar			
	ency *				
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To limit how many times this coupon can be used, enter that number here.	entage	10.00			
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.	ES ration Date ubinable uber of Uses	4/10/2021 Yes 			
		Sel	ect to enter data		
Enter a description of what this coupon is for.					
		DESCRIPTION *	ata		
		Coupon Redemptions S	ub-Grid 🗡		
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Click on the command button Save	🦻 RA	MCO S	ales & Acc	:ou ~	Coupons
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	Name * Coupon Code * Coupon Type *	New Mem NMCOU Order - Pe	ber Coupon rcentage		

2.1.7. Create Coupon (Discounts a percentage)

AMCO	Workplace	✓ Contacts > www.kplace	
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Year's Mem	bers •		
e 🛧 👘 First Name 🛧	Parent Customer	Email	Mobile Pl
Remmy	Coldwell Banker Asso	ciated Remmy.Ramco@	Dtest.test

Open the navigation areas



Choose the Sales and Accounting module	Contacts >			
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Click on the command button New	👂 RAM	160	Sales & Accou 🗸	Coupons
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	New Activ Create	a new Coupon record. 🗸		
	Name 个	Type ↑	Code	e P

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

D SAVE	B SAVE & CLUSE	T INEVV	 PORIVI EDITOR
PON : RAMCO			
ew Cou	non -		
1e *			
pon Code *		Ocicer to enter data	
pon Type *			
ES			



Then enter a code. This is the code that staff or the member will use to apply the discount.					
	PON : RAMCO				
	ew Coupon ≔				
	1e*	New Member Coupon			
	pon Code *	Ν			
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	1e*	New Member Coupon
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If applicable, set an expiration date for the coupon.	pon Type *	Order - Percentage
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To limit how many times this coupon can be used, enter that number here.	entage	10.00	
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.	ES ration Date binable ber of Uses	4/10/2021 Yes 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	
Click on the command button Save	COUPON Save th	t [®] SAVE & CLOSE + NEW E his Coupon. COUPON = New Member Coupon	Coupons FORM EE

2.1.8. Manually Update Price of Line Item on an Order

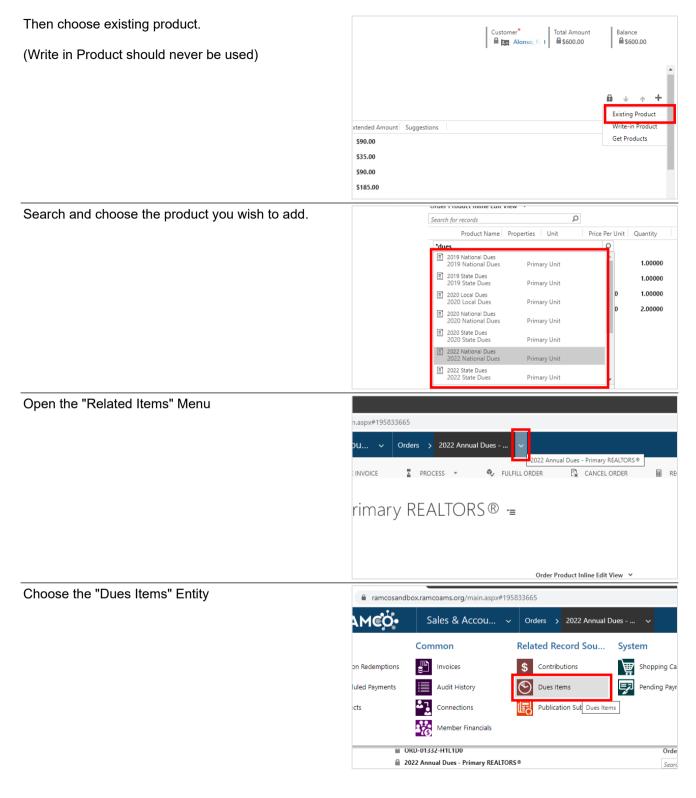
You must be in the Order record you wish to modify to use this Assist module. Orders may only be edited if they ARE NOT associated with renewal billing. If this Order is associated with a renewal billing, you must edit the dues item instead of the order.

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



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	21 Nation	Primary Unit	\$35.00	1.00000	\$0.00	\$35.00
	21 Nation	Primary Unit	\$90.00	1.00000	\$0.00	₿ \$90.00
iii 🔒 20	21 State	Primary Unit	\$185.00	1.00000	\$0.00	\$185.0
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Click on the Amount field to edit the amount	rimary REALTORS © Dues Order Products ke - REALTOR
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You may want to open the line item to edit it in some cases. To open it, double click the row	ss - Primary REALTORS♥ 6. Mike - REALTOR ss R® - Full Payment es - Primary REALTORS♥ 0 AM 0 AM



Click and edit the amount field Pricing Amount Overridden Calculated Opt Out* Ruin REPORT Ruin REPORT Ruin Report Ruin Repor
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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.



Use the hamburger icon to go to the accounting section	1CO•	Workplace 🕔	 Contacts 	> cutlip-r37-34, Mlke >
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		of this payment and refund the total una	
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	- -	Cancel Invoice Return Inventory	
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Make sure cancel invoice is set to yes	dit Card i4.17	The payment will be unappli choose whether or not you w	ed from want to
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Click on the item Yes in the list	4.17	choose whether or not you v	vant to
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Click on the button Continue		y Contributions that may exist for und to alternate Association or Acco Close	
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Click close.	cutlip-r37-34, Mike	Date	Method	Carc
The payment is now unapplied, this will allow us to adjust the order amount.	 Credit Card \$364.17	10/6/2021	Visa	**1
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Click on the Order to be adjusted	ACCOUNTING
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	<u>it</u> \$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.	JMMARY
	er ID * ORD-05428-D6M8G2
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	AT A GLANCE
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	- COMMUNICATION PREFERENCES



Once again click to open the payment	
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Click on the command button MORE COMMANDS	● - □ × © ☆ ★ ☞ ④ : □ Reading list
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	Contact [*] Account [*] Amount [*] Unapplied Amount cutlip-r37-34, 1 \$\$364.17
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Click apply payment	Unapplied: \$364.17 Refunded: \$0.00
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	Close Continue



then Click continue						
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Then enter the amount of money from the payment, you wish to apply to this order.			open invoices to		r. To apply this p	ayment to anot
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When ready, click continue to proceed				NowLappali	<u>ad. ¢264.17</u>	To
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Click on the button Submit	Refunded	\$0.00
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Now that the payment is applied, you will have unapplied funds available to refund.	Date Meth	od Card/Check Number Cu
	10/6/2021 Visa	**********1111 cutlip-r
To restart the payment wizard click "Perform Another Transaction"		
	Close Print Rec	eipt Perform Another Transaction
This time choose "I want to Refund the Unapplied		
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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 Make refund to alternate Association or Account. [option			
Click on the button Continue	Make refund to alternat	te Associat Continue	ion or Acco	unt. [or
Click submit to process the refund.	Refunded		ş	\$0.00
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The refund has been submitted.		Date	Method	Carc
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	 opez, Reggie 0/6/2021 10:52 AM opez, Reggie	Close	Print Receipt	Perfor

Please restart this assist from a contact record.



2.1.10. Pr	ocess a Payment						
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	Primary State Associat	
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 A	mo
	ORD-01242-K8Q7Q3 2019 REALTOR® Dues 6/17/2020	\$3
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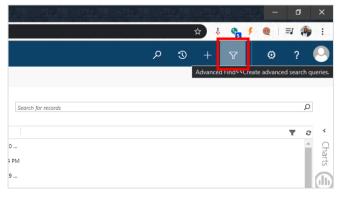
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Select continue to proceed to payment details.				
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	Use Available Funds and Credits			
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1. Enter the appropriate payment details for your	0.000 X			
payment type.	Amount Received			
	Back Cancel Continue			
Click continue to proceed to payment summary page.	Payment Amount			
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	Amount Received			
	Back Cancel Continue			



	6/1//2020 Cash
Verify the orders selected and the payment details before pressing Submit. Press submit to process payment.	0/1//2020 Cash
	Back Cancel Submit
Click on the "Print Receipt" button if a receipt is desired.	6/1//2020 Cash
	Print Receipt Close
Select close to exit the process payment wizard.	6/1//2020 Cash
	Print Receipt Close

2.1.11. Processing a Bulk Refund

Click on the navigation button Advanced Find



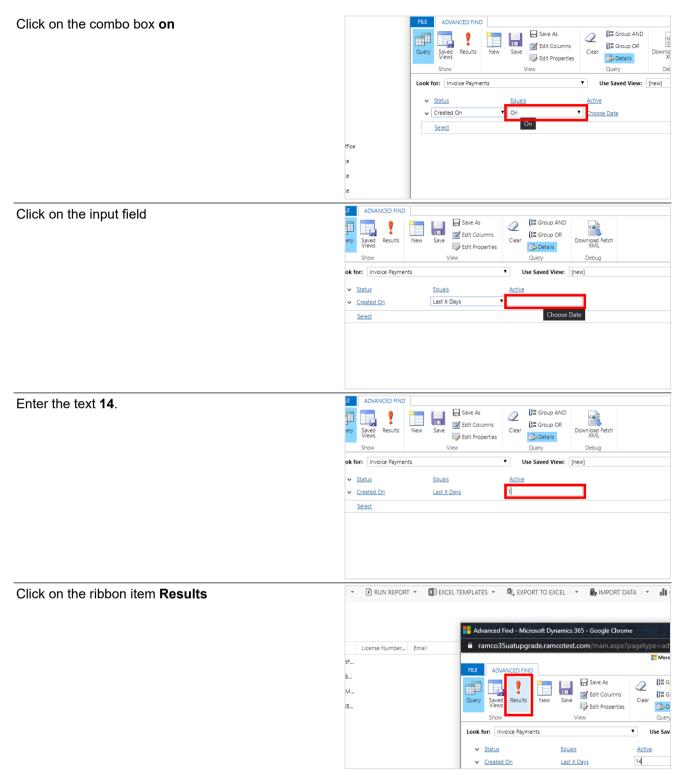


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Click on the item in the list	роэки		Query Saved Results New Save Clear
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		T13Office	Invoice Payments Invoice Products
		T15Office	Invoices Invoice Payments Knowledge Article Incidents
		T16Office	Knowledge Article Views Knowledge Articles
		T17Office	Knowledge Base Records
		T18Office	Languages Lead To Opportunity Sales Process
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Click on the button >>	Payments Select Values Select Values Select Values Selected Values Cative Inactive Cox Cancel
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Press the Backspace key 3 times.	View Query Debug
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	efund Test Order 003 INV-02562-83W9Y1 \$3.00 \$1.00 Cutlip-R35-02, Mike - 2021 Dues Cycle - MikeC - 2 INV-02557-J9P0H1 \$0.00 \$760.00 Aamodt, JoAnn
Click on the link Invoice Payments	
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	Invoices Invoices <td< th=""></td<>
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Click on the command button Bulk Refund	
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	Bulk Ketund Refund - Number of Invoire Revenentr
	Refund a Number of Invoice Payments
	49 PM
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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	
2	Select a view of Payments to Refund [optional]
	· · · · · · · · · · · · · · · · · · ·
	Active Invoice Payments Inactive Invoice Payments
	Invoice Payment View Invoice Payments Sub-Grid (Invoice)
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Click on the combo box Both	
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Click on the combo box Same			electing the correc ed once you comp		ang the intended	reiunas.
		Select a viev	w of Paymen	ts to Refund	[optional]	
		Invoice Payme				•
		Refund Typ	e [optional]			
		Same as Paym				•
		Cancel	Continue			
Click on the item in the list						
		Select a view	w of Paymen	ts to Refund	[optional]	
		Invoice Payme	ent View			•
		Refund Typ				
		Same as Payn				-
		Same as Paym Issue a Check	Refund			
		Refund in Cas	1			
Click on the button Continue		Selec	t a view of P	ayments to l	Refund [option	nal]
		Invoi	ce Payment View			
		Refu	nd Type [option	nal]		
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Click on the button Submit				NDYOUC	W4H3S6	
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Click on the button Close

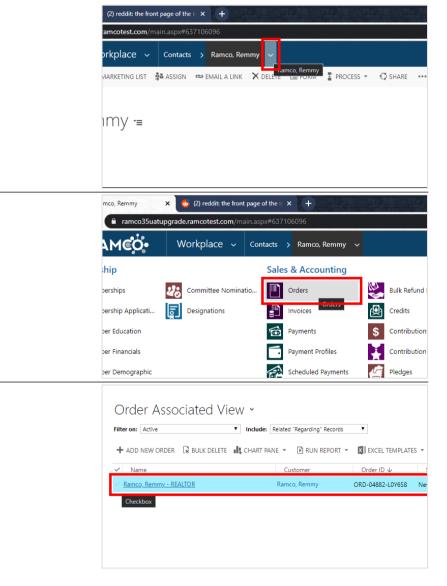


2.1.12. Waive a Fee

Click on the "View Related" button.

Click on the "Orders" entity.

Open an order record.





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 : <u>Primary Unit</u> S50.00 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 	
-	Coloret Des elucet	Existing
	Select Product Existing Product*	MikeC - Membership Application Fee
	Pricing	
	Pricing	Use Default
	Price Per Unit Volume Discount	■ \$50.00 ■ \$0.00
	Quantity *	1.00000
	Amount	▲ \$50.00
	Manual Discount	
	Tax	 ¢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	1.00000
	Quantity * 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	m \$0.00
	Quantity *	1.00000 S50.00
	Amount Manual Discount	
	Tax	
	Extended Amount	■ \$50.00





2.2. Editing Payments

2.2.1. Apply a Payment with Unapplied Funds

Click on the command button Payment Wizard

Click on the command button Payment Wizard	ר © + ק (⊂ <
	WORD TEMPLATES RUN REPORT U RUN REPORT U RUN REPORT
	Contact [*] Amount [*] Una; Shehata, John Stellar, John Store and S
	ECOMMERCE REQUEST SUMMARY + E
Choose "Apply this payment" to apply it to an open order or invoice.	
	What would you like to do wi 5055 want to apply this payment to ar I want to refund the entire amound
	I want to cancel this payment.



Click on the button Continue			I want to I want to	uld you like to do with this payr apply this payment to an existing order refund the entire amount of this payr cancel this payment.
	er Address			
You may need to choose orders, if there is no invoice to apply this payment to.	Cre	ehata, John edit Card 00.00 55		Customer: Shehata, John Unapplied: \$150.00 Ref Open Orders Open Invoices
Click into the "Amount to Apply" field				
	Amount \$150.00	Balance \$150.00	Customer Shehata, John	Amount To Apply
	\$0.00	\$0.00	Shehata, John	0.00
			Cu	rrent Unapplied: \$150.00
Then enter the amount you wish to apply				
	Amount	Balance	Customer	Amount To Apply
	\$150.00	\$150.00	Shehata, John	le la
	\$0.00	\$0.00	Shehata, John	0.00
			Cu	rrent Unapplied: \$150.00



Click on the button Continue													Tot
		1	Bac	k		Close		Cont	inue				
	۵			9	C	4	×	•	(٠	٥	0	۲
Click submit to perform the transaction.			Refund	ded								\$5	0.00
			Unapp	lied								\$	0.00
			Status									Ina	tive
		I	Bac	k		Close		Sub	mit]			
	õ	-		9	C	4	×	0			ø	0	۲
You transaction should now be completed.		_	Date		_	Metho		_	ard/Ch	neck N		-	C
To continue working with this payment choose "Perform Another Transaction".			4/23/20	20		Visa			*****	*****	*1111		She
If you are finished, click on close to leave.			Close		Prir	nt Recei	pt	Perfor	rm Anot	ther Tr	ansacti	ion	

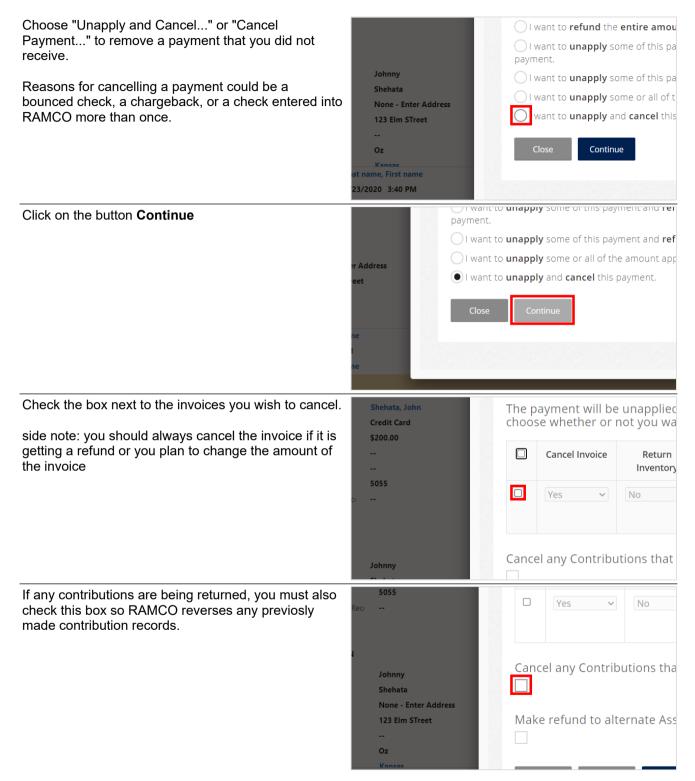
Please open the the payment then start this process again.

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

Click on the command button **Payment Wizard**

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WORD TEMPLATES	•	Þ	RUN REPORT	-	<u>^</u>	1	<u>a</u> 1	×
Contact ⁺	Amount €\$200		A c	Payment Wi	Ik Payment A yment Wizard zard pply / Cancel or	ł		ment
ECOMMERCE	REQUEST	SUMM	ARY			+		
Name			Cr	eated On	↓ Conta	ict		







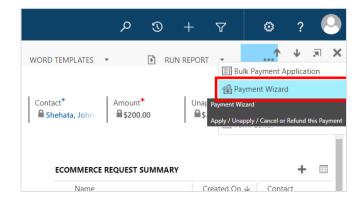
Click on the button Continue												
		N	Лаke	refu	nd to	o alte	erna	te Ass	sociat	tion or	Acco	unt. [or
		1	Bac	:k		Close		Contii	nue			
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Click submit to perform the transaction.			Refund	ded							\$	50.00
			Unapp	olied								\$0.00
			Status								In	active
			Bac	k		Close		Subr	nit			
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You transaction should now be completed.			Date			Metho	d	Ca	rd/Che	eck Num	ber	C
To continue working with this payment choose "Perform Another Transaction".			4/23/20)20		Visa		*	*****	****11	1	She
If you are finished, click on close to leave.			Close	2	Prin	t Recei	pt	Perforr	n Anoth	ner Transa	iction	

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





Choose "Unapply some or all of the amount applied"	 5055 eci Johnny Shehata None - Enter A 123 Elm STree 			at would y want to refu want to una hent. want to una want to una Close	pply some	tire amou e of this pa e of this pa e or all of t
Click on the button Continue	er Address reet	payment. I want to	unapp unapp unapp	iy some of t ly some of t ly and canc ntinue	his payme all of the a	nt and ref mount app
Check the box next to the invoices you wish to cancel. side note: you should always cancel the invoice if it is	Shehata, John Credit Card \$200.00			ayment v se wheth		
getting a refund or you plan to change the amount of the invoice				Cancel Inv	voice	Return Inventory
	5055 a			Yes		No
	Johnny		Cance	el any Co	ntributio	ons that
To return store items to inventory, open the menu under "Return Inventory"		ayment will b se whether or				
		Cancel Invoice		Return ventory	Invoice #	# Dat
		Yes 🗸	No		INV- lect the location furn the quantity	3/29/2 to which you wou of the products o
	Cance	el any Contrib	utions	that may	/ exist fo	or the In



Choose which store location the inventory should be returned to.		se whether or						
		Cancel Invoice	Return Inventory	Invoice #	Dat			
		Yes 🗸	No No Alternate Store		3/29/2			
		el any Contrib		-				
Click on the button Continue		any contribu	uons macma	ay exist for				
		refund to alter		ation or Acc	ount. [or			
	Back	Close	Continue					
	🔊 📻 🌐	9 C 🤹	K 💁 🚱	D \$ @) 🐵			
If any contributions are being returned, you must also check this box so RAMCO reverses any previosly made contribution records.	5055 Reci		□ Yes	~	No			
	Johnny Shehata None - Enter	Address	Cancel any Contributions tha					
	123 Elm STre Oz Kansas		Make refu	nd to alterr	iate Ass			
To issue refunds from a bank account other than your primary you must check this box	Shehata, John Credit Card		The paymer choose whe					
	\$200.00 		Cance	l Invoice	Return Inventory			
	5055 cı		Yes	✓ N	0			
	Johnny		Cancel any Contributions that					

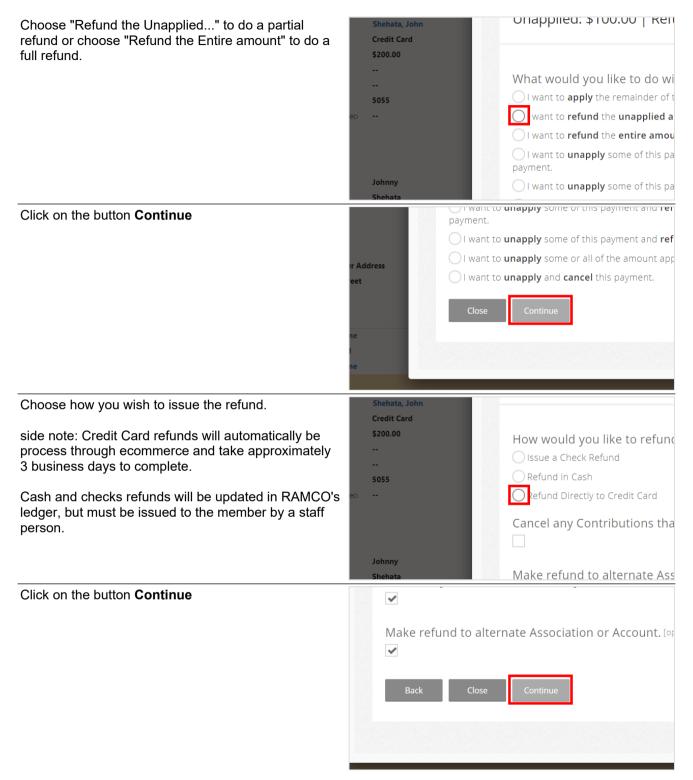


Click submit to proceed.	Shehata None - Enter Address	Cancel any Contributions tha Image: Contribution of the section o
Click on the button Continue	 ✓ Make refund to alterna ✓ Back Close 	ate Association or Account. [or
Choose "Apply this payment" to apply it to an open order or invoice.	 Shehata, John Credit Card \$200.00	Customer: Snenata, John Unapplied: \$150.00 Refi What would you like to do wi want to apply this payment to ar I want to refund the entire amou
Click on the button Continue	I want to ap	d you like to do with this payr pply this payment to an existing order efund the entire amount of this payn ancel this payment.



You may need to choose orders, if there is no invoice to apply this payment to.	 Shehata, John Credit Card \$200.00 5055 Reci			Customer: Shehata, John Unapplied: \$150.00 Reft
	Amount	Balance	Customer	Amount To Apply
	\$150.00	\$150.00	Shehata, John	0.00
	\$0.00	\$0.00	Shehata, John	0.00
			Cu	irrent Unapplied: \$150.00
Then enter the amount you wish to apply				
	Amount	Balance	Customer	Amount To Apply
	\$150.00	\$150.00	Shehata, John	5
	\$0.00	\$0.00	Shehata, John	0.00
Click on the button Continue			Cu	rrent Unapplied: \$150.00
Click on the button Continue		Back	Close	Tot
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Choose the Association ID field			\$150.00						
				Association ID	Am				
			Distribution #1						
	ddress		Distribution #2						
	aaress		Distribution #3						
			Distribution						
Then enter the Association ID or NRDS number of the institution to issue the refund.			\$100.00						
				Association ID	Am				
			Distribution #1	4					
			Distribution #2						
	ddress		Distribution #3						
			Distribution						
Choose the "Bank Account ID" field									
	וD		Amount	Bank Account ID					
		15							
Then enter the bank number where the refund should be issued from									
	ו ID		Amount	Bank Account ID					
		15		2					



Finally choose the amount field								
	d Amo	mount:						
		Association ID	Amount	Bank Ac				
	ution	4035						
	ution							
	ution							
Then enter the dollar amount of the refund from this bank account.	d Amo	ount:						
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		Association ID	Amount	Bank Ac				
payment in order to proceed.	ution	4035	[1]					
	ution							
	ution							
Click on the button Continue		Distribution #5						
		Distribution #6						
		Back Cancel	Continue					
	۵	l 🖶 🤊 🕲 🍓 I	🗙 🧧 🚱 🗖 🌣	0				
Click on the button Continue		Distribution #5						
		Distribution #6						
		Back Cancel	Continue					
	💫 🗧	🕂 😌 😍 🤹 I	🖍 💁 🚱 🗖 🌣	0				



Click on the button Submit	Refunded	\$50.00
	Unapplied	\$100.00
	Status	Active
	Back Clo	se Submit
Choose "Unapply and Cancel" or "Cancel Payment" to remove a payment that you did not receive.		I want to refund the entire amou I want to unapply some of this pa payment.
Reasons for cancelling a payment could be a	Johnny Shehata	I want to unapply some of this pa
bounced check, a chargeback, or a check entered into RAMCO more than once.	None - Enter Address 123 Elm STreet	want to unapply and cancel this
	 Oz	Close Continue
	Kancas Ist name, First name	ciose
	23/2020 3:40 PM	
Click on the button Continue	paymer	inc to unapply some or this payment and ren nt.
	O I wa	ant to unapply some of this payment and ref
	er Address	ant to unapply some or all of the amount app
	eet • wa	ant to unapply and cancel this payment.
	Clo	se Continue
	ne	
	ne	
Enter your reason for cancelling this payment.		
	What's th	he reason for cancelling this payme
	ddress	



Click on the button Continue	Make refund to alternate Association or Account.
Click on the button Close	Image: Constraint of the state of the s
	\$200.00 5055 eci Close Print Receipt Perfo
Click on the button Continue	Johnny ORD-01212- 574/2020 \$0:00 Shenau C4M6K8 John
	To Back Close Continue
Click submit to perform the transaction.	ord&id=4c236cac-ca74-4f5b-89f4-d41b4595039b 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	
	-		

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Please open the the payment then start this process again.

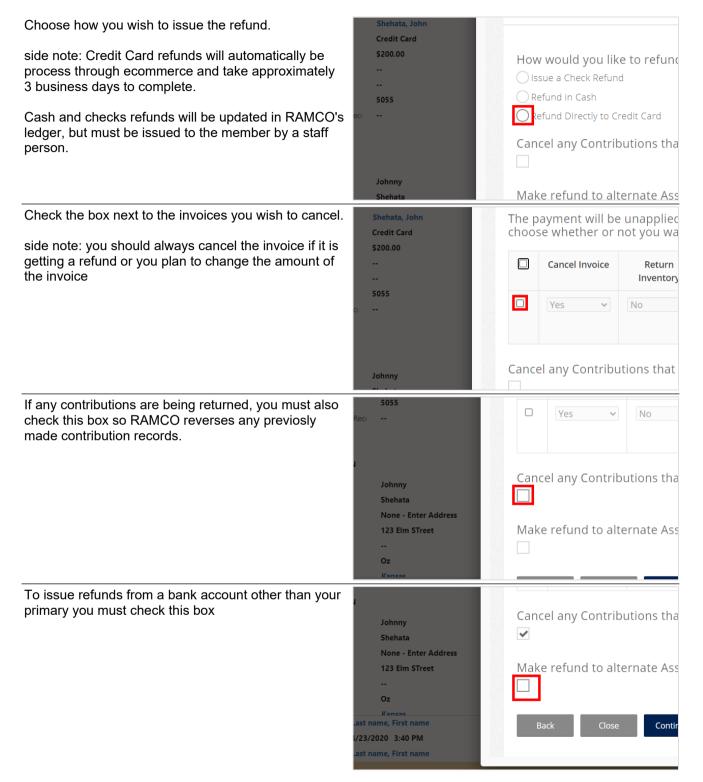
2.2.4. Issue a Refund (From a Secondary Bank Account)

You must have the payment record open to proceed.

Click on the command button Payment Wizard

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	WORD TEMPLATES	•	🖪 RI	JN REPORT	T Bul	k Payment /	↓ Applicati	an 🗙	
	Contact*	Unaț I \$:	Pay Payment Wiz	ıment Wizaı	d				
	ECOMMERCE	REQUEST S	UMMAI	RY			+		
	Name				eated On				
Choose "Refund the Unapplied" to do a partial refund or choose "Refund the Entire amount" to do a full refund.	Shehata, John Ul Credit Card \$200.00			Una	ppile	a: \$100.00 F			
				Wha	t woul	d you l	ike to	o do wi	
	5055			_		pply the			
	ecı 			O w	ant to r	efund th	e una j	plied a	
				Olw	ant to r	efund th	e enti i	re amou	
				O I w payme		napply s	ome o	f this pa	
	Johnny Shehata			Olw	ant to u	napply s	ome o	f this pa	
Click on the button Continue		paym		unappi	y some (u uns pa	yment	anu rei	
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	r Address			unappl	y some (or all of t	ne amo	ount app	
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Click on the button Continue						
	V			rnate Association or a	Account. [of	
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Choose the Association ID field			\$150.00			
				Association ID	Am	
			Distribution #1			
	ddress		Distribution #2			
	duress		Distribution #3			
			Distribution			
Then enter the Association ID or NRDS number of the institution to issue the refund.			\$100.00			
				Association ID	Am	
			Distribution #1	4		
	ddress		Distribution #2			
			Distribution #3			
			Distribution			
Choose the "Bank Account ID" field						
	۱D		Amount	Bank Account ID		
		15				
]			



Then enter the bank number where the refund should be issued from				
	۱D	Amount	Bank Account ID	
		15	2	
Finally choose the amount field	d Amo	ount:		
		Association ID	Amount	Bank Ac
	ution	4035		
	ution			
	ution			
Then enter the dollar amount of the refund from this bank account.	d Amo	ount:		
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		Association ID	Amount	Bank Ac
payment in order to proceed.	ution	4035	1	
	ution			
	ution			
Click on the button Continue		Distribution #5		
		#6 Back Cancel	Continue	
	õ -		K 💁 🚱 🗖 🌣	0



Click submit to perform the transaction.	Refunded			\$5	0.00
	Unapplied			\$	0.00
	Status			Ina	ctive
	Back	Close	Submit		
	🖉 📑 🛞 🧐) C 🔢 🕅	💁 🚱 😐	☆ @	۲
You transaction should now be completed.	Date	Method	Card/Check N	Number	C
To continue working with this payment choose "Perform Another Transaction".	4/23/2020	Visa	*********	**1111	She

Please open the 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						
	Contact* Amount* Shehata, John \$200.00	Una; Payment Wizard						
	ECOMMERCE REQUEST SUMMARY +							
	Name	Created On Contact						
Choose "Refund the Unapplied" to do a partial	Shehata, John							
refund or choose "Refund the Entire amount" to do a	Credit Card							
full refund.	\$200.00							
		What would you like to do wi						
	5055	I want to apply the remainder of t						
	eci	want to refund the unapplied a						
		I want to refund the entire amou						
		I want to unapply some of this pa payment.						
	Johnny	I want to unapply some of this pa						
	Shehata	<u> </u>						

<u>ک</u> کر

+ ∇

• ?



Click on the button Continue	er Address reet ne t	I want to unapply some of this payment and ref 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. Close Continue
Check the box next to the invoices you wish to cancel.	Shehata, John Credit Card	The payment will be unapplied choose whether or not you wa
Side Note: you should always cancel the invoice if it is getting a refund or you plan to change the amount of the invoice	\$200.00 	Cancel Invoice Return Inventory
	5055 0	□ Yes ✓ No
	Johnny	Cancel any Contributions that
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.	Shehata, John Credit Card \$200.00 5055	How would you like to refund Sissue a Check Refund
Cash and checks refunds will be updated in RAMCO's ledger, but must be issued to the member by a staff person.	eo 	Refund Directly to Credit Card Cancel any Contributions tha
	Johnny Shehata	Make refund to alternate Ass
Click on the button Continue		nd to alternate Association or Account. [0s Close Continue



Click submit to perform the transaction.		Refunded		\$50.00				
		Unapplied			5	\$0.00		
		Status			Ina	active		
		Back	Close	Submit				
	<u>۵</u>	. 🔅 🧐	C 🙀 🕅	<u>•</u> 6	♥ @	۲		
You transaction should now be completed.		Date	Method	Card/Check	Number	C		
To continue working with this payment choose "Perform Another Transaction".		4/23/2020	Visa	*****	***1111	She		
If you are finished, click on close to leave.		Close	Print Receipt	Perform Another	Transaction			

Please open the the payment then start this process again.

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

You must have the payment record open to proceed.

Click on the command button Payment Wizard

	م	3	+	7	۲	?		
WORD TEMPLATES	Ŧ	🖻 RU	JN REPORT		Ik Payment A	↓ spilag) tion	×
Contact ⁺	Amount \$200.			Payment Wi	yment Wizard	Ŀ		ment
ECOMMERCE	REQUEST	SUMMAF		eated On	↓ Conta	+		



Choose to unapply or refund the payment	 5055 eci Johnny Shehata None - Entu 123 Elm STi 	reet	O I I payn O I I	at would want to refu want to una nent. want to una want to una close	und the er pply som pply som pply som pply and Continue	ntire amou e of this pa e of this pa e or all of t cancel this
		payment.		w some of t	his nover	ant and rof
				oly some of t		
				oly and canc		
	eet	Close	Cc	ontinue		
Check the box next to the invoices you wish to cancel.	Shehata, Joh Credit Card	ın		oayment v se wheth		
side note: you should always cancel the invoice if it is getting a refund or you plan to change the amount of the invoice	\$200.00 			Cancel In		Return Inventory
	5055 cı			Yes	~	No
			Canc	el any Co	ntributio	ons that
	Johnny					
To return store items to inventory, open the menu under "Return Inventory"	The	e payment will b ose whether or	e una not ye	pplied fro ou want t	om the s o cance	elected i l the indi
		Cancel Invoice		Return ventory	Invoice	# Dat
		Yes 🗸	No			3/29/2 to which you wou of the products o
	Car	ncel any Contrib	utions	s that may	y exist fo	or the In



Choose which store location the inventory should be returned to.		(choo	se w	hethe	er or n	ot you	want t	o canc	el th	e indi
				Car	ncel Inv	oice	Reti Inver		Invoic	e #	Dat
				Ye	S	~		v te Store l		-	3/29/2
		1	Canc	el an	ny Cor	ntribut		nat ma <u>r</u>		for t	he Inי
Click on the button Continue				гану	Cont	nound	חוז נוומ	it may	CAISCIN	JI UI	
		M	lake i	refur	nd to	altern	ate Ass	sociatio	on or A	CCOL	int. [०ः
			Back	<	CI	ose	Contii	nue			
	۵		•	9	C	uii 🛛 🕹	•	<u>6</u>	\$	Q	۲
Click submit to perform the transaction.			Refund	ed						\$5	0.00
			Unappl	lied						\$	0.00
			Status							Inac	tive
			Back	ĸ	Cl	ose	Subr	nit			
											_
	۵			9	C	uii 🛛	•	(\$	Q	8
You transaction should now be completed.		D	ate		M	ethod	Ca	rd/Check	Numbe	r	C
To continue working with this payment choose "Perform Another Transaction".		4	/23/202	20		Visa	*	******	***1111		She
If you are finished, click on close to leave.			Close		Print R	leceipt	Perforr	n Another	Transacti	on	

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.



Click on the command button Payment Wizard	ۍ م) + 7 ° ? 🕘
	WORD TEMPLATES 🔹 🕞	RUN REPORT
	Contact ⁺ Amount [*] Shehata, John \$200.00	Unai Payment Wizard S Apply / Unapply / Cancel or Refund this Payment
	ECOMMERCE REQUEST SUMM	
Choose "Unapply some or all of the amount applied"	Name	Created On & Contact What would you like to do wi
	 5055	I want to refund the entire amou
	eci	I want to unapply some of this pa payment.
		OI want to unapply some of this pa
	labora	want to unapply some or all of t
	Johnny Shehata	O I want to unapply and cancel this
	None - Enter Address 123 Elm STreet	Close Continue
Click on the button Continue	payment.	r to unappiy some or this payment and ren
	O I want	t to unapply some of this payment and ref
		t to unapply some or all of the amount app
		t to unapply and cancel this payment.
	r Address Close	Continue
	ne	
Check the box next to the invoices you wish to cancel.	Shehata, John	The payment will be unapplied
side note: you should always cancel the invoice if it is	Credit Card \$200.00	choose whether or not you wa
getting a refund or you plan to change the amount of the invoice		Cancel Invoice Return Inventory
	5055 ci	□ Yes ~ No
	Laboration of the second s	Cancel any Contributions that
	Johnny	



If any contributions are being returned, you must also check this box so RAMCO reverses any previosly made contribution records.	Reci	5055 Johnny Shehata None - Enter Add 123 Elm STreet Oz	dress	Cancel	Yes v	
Click on the button Continue	Ā		und to altern	ate Asso	ociation or A	
Click submit to perform the transaction.	õ	Refunded Unapplied Status Back	Close	Submit		\$50.00 \$ \$0.00 1 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 4/23/2020 Close	Method Visa Print Receipt	Card	I/Check Numbe	r Ci She

Please open the the payment then start this process again.



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.

r's Members - 🕅 🗙 🛛 🕂

Open the Navigation Areas

opon alo navigatori / todo									
	ramcosandbox.ramcoams.org/main.aspx	aramcosandbox.ramcoams.org/main.aspx#61717155							
	AMCO• Workpl	ace 🗸 Contacts >							
	ew 👼 delete 👻	C EMAIL A LINK	▶ R						
	Year's Members 👻								
	e ↑ First Name ↑ Parent Custo Remmy Coldwell Ban	mer Email ker Associated Remmy.Ramco@test.test	Mobile Pl						
Click on "Dues Cycles"									
	My Work	Quick Membership	Quick						
	Dashboards	Memberships							
	Activities	Committees							
	Reports	Dues Cycles	††						
	Data Management		•						
Choose a "Dues Cycle"	The New Pedit	🗸 ACTIVATE Lo D	EACTIVATE						
,									
	➡ Active Dues Cy	cles ×							
	→ Active Dues Cy	Cles V Default Billing Year	Duration T						
			Duration T Dated						
	✓ Name ↑	Default Billing Year							
	✓ Name ↑ 2020 New Member Apps	Default Billing Year No 2019	Dated						
	 ✓ Name ↑ 2020 New Member Apps 2021 MLS Dues Cycle 	Default Billing Year No 2019 No 2021	Dated Dated						



Choose a "Dues Schedule"		
		DUES SCHEDULES
		Name ↑ Dues Cycle
		Primary Agent 2021 Dues Ren
		4
Click on the plus symbol (+) to add an additional	ATES *	
"Dues Option"		
		+ 🗉
	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
Future a new offentile allocation		
Enter a name for the dues option		
		Active Dues Options 💙
	ewal	Name 个
		2021 New Primary REALTOR®
		Primary Agents - Full Payment
		Primary Agents - Payment Plan
		4
A "Dues Schedule" may only have 1 default "Dues		New Dues Option -=
Option". The rest are optional and will need eligibility dates to indicate when a member may choose that		
option.		
	ewal	Name* Active Dues Proc
		Dues Schedule *
		Default * iscount (Free) con
		Default to Payment PI New Portal Account Setup
		* Split Option * New Primary Realtors w/o Sentrilock
		Sort Order New Primary Realtors wo/o Sentrilock



Enter eligibility begin date only if this is not the default "Dues Option			ues opric	/ *≡
	ewal	Name *	New Payme	Active Dues Prod
	ic wai	Dues Schedule	* Primary Age	Name 🛧
		Default *	No	To enable this con
		Eligibility Begir	Coloration	ter data
		Eligibility End E	Date -	
		Publish To Port Default to Payr		
		*		
		Split Option*	Split	
Enter eligibility end date only if this is not the default "Dues Option		ew Dues	οριιοπ =	
		Name*	New Paymen:	Active Dues Products 💙
		Dues Schedule *	Primary Age	Name 1
		Default *	No	
		Eligibility Begin Date		To enable this content, create
		Eligibility End Date *		
		Publish To Portal *	Yes	
		Default to Payment PI	Νο	
		Split Option *	Split	
Click save to create the dues option. Repeat these steps to create more "Dues Options"	gent X +	Sort Ordor	10 Dues Option: New Dues	Option - Google Chrame
		ms.org /main.aspx#6884434		coams.org/main.aspx?etc=10129
After create a "Dues Option", your next step will be to add all the "Dues Products" associated with that	¢ġ.	Workplace 、	×	MCO New Du
"Dues Option".	DEAC	TIVATE <u> </u>	.et Rave	SAVE & CLOSE
	мсо			
	Ager)† -=	DUES OPTION : RA	
	riger	ii	New D	ues Optior

2.3.2. Charge a Specific Product on a Payment Plan Date

Open the Navigation Areas

/ear's Members - 🕅 🗙	(+)				
ramcosandbox.ra	amcoams.org/mair	.aspx#794429432			
АМСО•	Wor	kplace 🗸	Contacts	>	
EW 🔟	DELETE	ته ⊤	Workplace EMAIL A LINK	-	🖻 RL
Year's M	embers	~			
e 🛧 👘 First Nam	ne 🛧 🕴 Parent	Customer	Email		Mobile Pho
Remmy	Coldw	ell Banker Associa	ted Remmy.Rar	mco@test.tes	st



Choose the Membership area	🗧 🚦 Contacts This Year's Members - 🗈 🗙 🕂 🕂					
	igstarrow igstarro	oams.org/main.aspx#794429432				
	F RAMCO	Workplace 🗸 Cor	ntacts >			
	Workplace	Membership	Events			
	Customers	My Work	Quick Mer			
	Accounts	Dashboards	Membe			
Select the Dues Cycle entity	qınzrəqməivi	Setup	Fundraisin			
	Memberships	Member Types	PACs			
	Applications	Committee Types	\$ Contrib			
	Office Memberships	Committee Positions	Sy Bulk Co			
	Dues Cycles	Associations	Political			
	Committees		Funds			
	Bulk Renewal Imports					
Open the dues cycle with the installment plan	Active Dues Cy	′cles ∗				
	✓ Name ↑	Default Billing Year	Duration Ty			
	2020 New Member Apps	No 2019	Dated			
	2021 Dues Renewal	No 2021	Dated Dated			
	2021 MLS Dues Cycle 2021 New Member Apps	No 2021	Dated			
	2022 New Member Apps	No 2022	Dated			
	MLS Dues Cycle	Yes	Dated			
Open the schedule with the installment plan						
	DUES SCHEDULES					
	Name 1		Dues Cycle			
	Primary Agent		2021 MLS Dues			
			-			
	4					



Choose the dues option for the installment plan.	
	Active Dues Options 💙
	Name ↑
	Primary Agents - Full Payment
	4
Each payment schedule represents one payment in an installment plan.	
Select a payment schedule where you want the	Payment Schedules
payment to be for a specific product or products on the renewal bill.	Name ↑ Begin Date
	<u>1/1/2021 - 2/1/2021</u> 1/1/20
Click on the link Add Product record.	
	_
	t 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.	
	t match a product in Dues Products.) +
If you select a product, that is not a part of the dues option, this will not work.	Status Publish To OnI Publish to PO Quantity On Taxable
	Select a value.



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.

Í	2020 Application Fee 2020 Application Fee
i	2020 Local Dues 2020 Local Dues
i	2020 National Dues 2020 National Dues
i	2020 National Image Campaign 2020 National Image Campaign
Í	2020 State Dues 2020 State Dues 2020 State Dues
	Look Up More Records
1	10 results

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, RACMO 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	Workplace	e 🗸 Contacts > Contact 05, Example >						
	CONNECT -	📬 ADD TO MARKETING LIST 👫 ASSIGN						
	tact 05, Example <mark>™</mark>							
	ders that are 30+ days old.							
		Occupation Realtor						
Click on the link MEMBERSHIPS	ct 05, Examp) e -=						
	:hat are 30+ days old.	AT A GLANCE SUMMARY						
		MEMBERSHIPS						
		CLASSES AND MEETINGS						
		ACCOUNTING						
	-	ADDRESSES						
		DEMOGRAPHICS AND MARKETING						



Choose a membership to recalculate the dues.	dues.						
	Membership Sub-Grid 🗸						
	Search for recor		Q				
	Primary		NRDS ID Member T	ype Membe			
	es	Contact 05, Example	e M88800005 REALTOR	R			
Open the dues item to recaculate							
			Dues Items Sub-Grid V Membership	Date			
			Iontact 05, Example - REALT				
			< l				
Change the pricing strategy date	s Cycle *	MLS Dues Cycl					
	s Option *		ts - Full Payment le - Primary Agent				
	er 1g Year		ac - Frinary Agent				
	e Paid	₽					
	ng Stage	Reinstatement					
	ng Strategy Date tribution Type	6/5/2000 12	::00 AM				
	d Type	₽					
	ATION						
Click Save.							
RAMCO will now recalulate the dues item.							
	atus	Active					
	atus Reason	Pending		d changes 📘			
	T						
	<u>N</u> 👂			3/29/2021 😢			

Please restart this assist from a contact record.



2.3.4. Schedule Dues Late Fees

Open the Navigation Areas, and go to Workplace.	АМСО	Workplace	✓ Dues Cycles >	2021 Dues Rene	
	ew 🐻 deact	TIVATE 👼 I	DELETE 🖘 EMAIL A	LINK 👶	
	: RAMCO				
	Dues Renewal -=				
	2021 Dues Renewal ST PAUL AREA ASSOCIATION OF REALTORS® INC				
Choose the Dues Cycle entity.					
	My Worl	k	Quick Membership	Quick	
	Dashboards Carlot Activities Reports		Memberships		
			Committees	롣 ci	
			Dues Cycles	••• M	
	🛢 👩 Data	Management			
Click on the name of the dues cycle, you wish to schedule a late fee for.	→ Active Dues Cycles				
	✓ Name ↑		Default Billing Year	Duration Ty	
	2020 New Memb		No 2019	Dated Dated	
	2021 MLS Dues		No 2021	Dated	
	2021 New Memb	per Apps	No 2021	Dated	
	2022 New Memb	per Apps	No 2022	Dated	
	MLS Dues Cycle		Yes	Dated	
Make sure each schedule has the appropriate late fee associated with it.					
Schedules without a late fee, will not be issued a late fee.	DU	ES SCHEDULES			
	_	Name ↑		Dues Cycle	
Open the dues schedule to verify.	Primary Agent 1021 Dues Ren				
	4	Primary Agent			



If necessary add a late fee here for the first late fee.	imary Agent =			
	1e*	Primary Agent		
	s Cycle *	2021 Dues Renewal		
	nber Type *	REALTOR		
	Fee	٩		
	Fee 2	Select		
	statement Fee			
	er Source			
If you charge a second late fee, add it here.		jent ™		
	ne*	Primary Agent		
	s Cycle *	2021 Dues Renewal		
	nber Type *	REALTOR		
	Fee	D		
	Fee 2			
	statement Fee			
	er Source			
Click on the Dues Cycle to return to it.	S SCHEDULE : RAMCO			
	imary Agent ≔			
		<i>j</i> =		
	1e*	Primary Agent		
	s Cycle *	2021 Dues Renewal		
	nber Type *	REALTOR 2021 Dues Kenewai		
	Fee	X *late		
	Fee 2			
	statement Fee			
	er Source	-		
Use the Apply Late Fee Date field to schedule the late	Begin Date *	1/1/2021 12:00 AM		
fee.	End Date *	1/1/2022 12:00 AM		
On the designated date and time, RAMCO will add a late fee to all unpaid bills, using the late fee present	Automatic Cycle Management			
on the dues schedules.	Apply Late Fee Dat	as fate ree Auto mggerea.		
		No		
	Apply Late Fee 2 Date Select to enter data ; Late Fee 2 Auto-Triggered?			
	Deactivate Membership Date Was Deactivate Membership Auto-			
	Close Dues Cycle Date Was Close Dues Cycle Auto-Triggen			
		Was close Dues cycle Auto-Inggel No		



Click Save to complete the process.

		unsaved changes
atus Reason	Active	_
atus	Active	

2.4. Store Management

Add a store location 2.4.1.

Open Navigation Areas	Contact: Ramco, Remmy × Shttps://ramcosandboxisv.ramcoa × +				
	RAM	1CO • Workplac	e 🗸 Contacts > Ramco,	Remmy >	
	- NEW 🖧 CONI		G LIST 🚦 Workplace 🖘 EMAIL A LI	NK 🗙 DELETE 🗐 FO	
	CONTACT : RAMCO Ramco, Remmy '≡ AT A GLANCE				
Click on the navigation area Sales & Accounting	s://ramcosandboxisv.ramcoe × +				
	org/main.aspx#980195191				
	place V Contacts > Ramco, Remmy >				
		Events	Sales & Accounting Sales &	ccounting ^{ns}	
		Quick Membership	Quick Events	Quick Account	
	oards	Memberships	Courses	Products	
	ties	Committees	Classes	Orders	
Click on the link Store Locations					
	ions	Sales & Accounting	Settings	Elections	
	ıg	Maintenance		Extensions	
	counts	ECommerce Request	Store Locations	ECommerce I	
	es	ECommerce Distributi			
	Accounts	Batch Definitions Payment GL Definitions	Product Location Tran		
	untina Exporte				



Click "New" to create a new store location

(→) thtps://cmrcrm.	ramcoams.org/main.aspx#581984	4353
Store Locations Active Stor	× 📑	
RAMCO	Sales & Accou	✓ Store Locations >
Apps for Dynamics 365 Vie	w Dynamics 365 information on the	e go with apps for your phone, tablet, Outlook, and more!
+ NEW DELETE	🖘 EMAIL A LINK 🛛 👻 🗈 RU	UN REPORT 👻 🕅 EXCEL TEMPLATES 👻 🔩 E
→ Active Store	Locations ~	
✓ Name ↑	C	Created On
CMR Office		12/5/2019 4:25 AM

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

2.4.2. Inventory Transfer Wizard

Open the Navigation Areas

Open the Navigation Areas	\leftarrow \rightarrow \blacksquare ht	ps://ramco35uatupgrade.ramcotest.	com/main.aspx#422359142	
	Accounts Active	Accounts × 📑		
	RAM	O Workplace	✓ Accounts >	
	Apps for Dyna	mics 365 View Dynamics 365 informa	tion on the go with apps for your phone, t	ablet, Outlook, and more!
	+ NEW 💼 I	DELETE 🖂 🖘 EMAIL A LINK	🛛 🕅 RUN REPORT 👻 🚺 EXCEL	templates 👻 🖏 ex
	→ Active	e Accounts ×		
	✓ Account	Name 🛧 🛛 NRDS ID	License Number Email	Main Phone
		506010788		
Click on the "Salas & Accounting" pavigation area		1000:FQT3mhW.		
Click on the "Sales & Accounting" navigation area.	com /main.aspx#422	359142		
	✓ Accounts	>	Sales & Acco	ounting
		Events	Sales & Accounting	Elections
		Quick Membership	Quick Events	Quick Account
	oards	Memberships	Courses	Products
	ties	Committees	Classes	Orders
Click on the "Store Locations" entity.				
	ounting	Elections	Marketing	Service
	ng	Maintenance	Store Locations	Custom E-Corr
	counts	ECommerce Request	Store Locations	Web Element
	es	ECommerce Distributi	Product Locations	Submissions
	Accounts	Batch Definitions	Product Location Tran	
	ue Recognition	Payment GL Definitions		
	unting Exports			

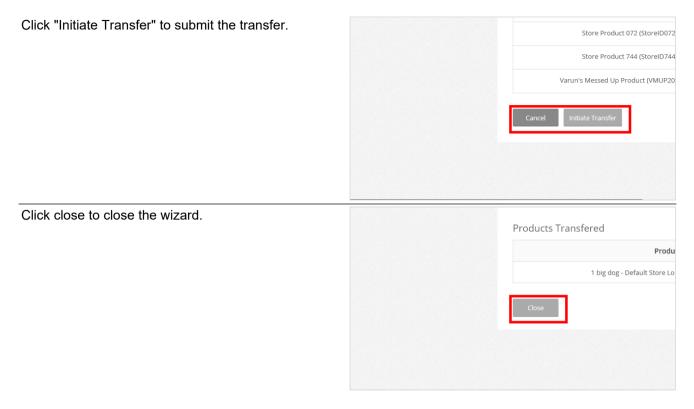


Open a store location to transfer inventory from.	Apps for Dynami	cs 365 View Dynam	ics 365 information	on the go with apps	for your phone, ta	blet, Outlook,	and more!
	+ NEW 🖌 EDI	T 🗸 ACTIVATE	🗟 DEACTIVATE	💼 delete 🗸 👻	🐝 Assign	🗘 SHARE	പ്പ EMA
		Channel I.					
	➡ Active	Store Loc	ations •				
	✓ Name ↑			Created On			
	Sam's Store Lo			5/16/2019			
	Sam's Store Lo			10/1/2013	12-21 FW		
Click on the item MORE COMMANDS							
	e Location >						
	ore! Get Apps for D	ynamics 365					
	LOW 💽 START DIA	LOG 🛛 WORD T	EMPLATES 🔻				
	PRODUCT LOCATION	S					
Click on the "Transfer Inventory" wizard.							
Click on the "Transfer Inventory" wizard.	location s		_			-	-
Click on the "Transfer Inventory" wizard.	e Location >	mamics 365					
Click on the "Transfer Inventory" wizard.	10rel Get Apps for Dy		EMPLATES 💌				
Click on the "Transfer Inventory" wizard.	10rel Get Apps for Dy	rnamics 365		P Run Report			
Click on the "Transfer Inventory" wizard.	10rel Get Apps for Dy						
Click on the "Transfer Inventory" wizard.	10rel Get Apps for Dy			🕑 Run Report			
Click on the "Transfer Inventory" wizard.	10rel Get Apps for Dy			Run Report]	
Click on the "Transfer Inventory" wizard.	Get Apps for D LOW START DIAI	LOG 🛛 WORD T		Run Report	ory		
Click on the "Transfer Inventory" wizard.	LOVE Get Apps for D ₁	LOG 🔯 WORD T		Run Report	Quantity	on H	
Click on the "Transfer Inventory" wizard.	Get Apps for D LOW I START DIAI PRODUCT LOCATION Name ↑	LOG 🕅 WORD T		Run Report	Quantity		
	Get Apps for D LOW I START DIAI PRODUCT LOCATION Name ↑	LOG 🕅 WORD T		Run Report	Quantity		
Select the "Quantity to Transfer" field for the product	Get Apps for D LOW I START DIAI PRODUCT LOCATION Name ↑	LOG 🕅 WORD T		Run Report	Quantity		
Select the "Quantity to Transfer" field for the product	Norel Get Apps for D 2LOW Image: Start Dial PRODUCT LOCATION Name ↑ Image: Name ↑	LOG 🕅 WORD T		Run Report	Quantity		
Select the "Quantity to Transfer" field for the product	Norel Get Apps for D 2LOW Image: Start Dial PRODUCT LOCATION Name ↑ Image: Name ↑	LOG 🕅 WORD T	ne, First name	Run Report Run Report Run Report Form Editor Product	Quantity	417007	
Select the "Quantity to Transfer" field for the product	Norel Get Apps for D 2LOW Image: Start Dial PRODUCT LOCATION Name ↑ Image: Name ↑	S	ne, First name	Run Report Run Report Run Report Form Editor Product	Quantity	417007	
Select the "Quantity to Transfer" field for the product	Norel Get Apps for D 2LOW Image: Start Dial PRODUCT LOCATION Name ↑ Image: Name ↑	s Last nan Quantity (ne, First name	Product	Quantity	417007	
Select the "Quantity to Transfer" field for the product	Norel Get Apps for D 2LOW Image: Start Dial PRODUCT LOCATION Name ↑ Image: Name ↑	S Last nan Quantity 140	ne, First name	Run Report Transfer Invente Transfer Invente Form Editor Product Qua	Quantity	417007	



Enter the amount of inventory to be transferred.		Last name, First name	2	~
	~			
		Quantity on Hand	Quantity to Transfer	
		14006		
		50003	0	
		9878	0	
	cation1)	696	0	
Select the authorizing user drop down field.				
	_	_	✓ ▲ C Search	
		Authorizing User		
		Last name, First name		~
	\checkmark			
		Quantity on Hand	Quantity to Transfer	
		14006	1000	
Select the user authorizing the transfer				
Select the user authorizing the transfer.		_	→ A C Search	
Select the user authorizing the transfer.			← 🚔 🖒 Search	
Select the user authorizing the transfer.		Authorizing User	v ≧ Ċ Search	
Select the user authorizing the transfer.		Last name, First name Cutlip, Mike	v 🔒 C Search	
Select the user authorizing the transfer.		Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John Fox, Thom	v 🔒 Ĉ Search	
Select the user authorizing the transfer.		Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John	✓ ▲ C Search	
Select the user authorizing the transfer.		Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John Fox, Thom McCormick, Donna INTEGRATION	✓ ▲ C Search Quantity to Transfer	
		Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John Fox, Thom McCormick, Donna INTEGRATION SYSTEM		
Select the "Store Location" to receive the transferred	deisv.ram ×	Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John Fox, Thom McCormick, Donna INTEGRATION SYSTEM Quantity on Hand	Quantity to Transfer	
		Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John Fox, Thom McCormick, Donna INTEGRATION SYSTEM Quantity on Hand	Quantity to Transfer	
Select the "Store Location" to receive the transferred		Last name, First name Cutilp, Mike Lopez, Reggie Shehata, John Fox, Thom McCormick, Donna INTEGRATION SYSTEM Quantity on Hand	Quantity to Transfer	
Select the "Store Location" to receive the transferred		Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John Fox, Thom McCormick, Donna INTEGRATION SYSTEM Quantity on Hand 14006 Original Store Loc Default Store Location Destination Store	Quantity to Transfer	
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Select the "Store Location" to receive the transferred		Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John Fox, Thom McCormick, Donna INTEGRATION SYSTEM Quantity on Hand 14006 Original Store Loc Default Store Location Destination Store	Quantity to Transfer	
Select the "Store Location" to receive the transferred		Last name, First name Cutlip, Mike Lopez, Reggie Shehata, John Fox, Thom McCormick, Donna INTEGRATION SYSTEM Quantity on Hand 14006 Original Store Loc Default Store Location Destination Store	Quantity to Transfer	





2.4.3. Item Receipt Wizard for Purchase Orders

The new PO Wizard is designed to simplify item receipts.			rem/maip.aspx#566859880 replace ore Lo, Accounts Active Accounts >	Accounts ×
	Apps for Dynam	ics 365 View Dynamics 365 informati	on on the go with apps for your phone, ta	blet, Outlook, and more!
	+ NEW 💼 DE	ELETE 🛛 👻 EMAIL A LINK 🗍 👻	🗈 RUN REPORT 👻 🗓 EXCEL 1	TEMPLATES 👻 💐 EX
	→ Active	Accounts ×		
	✓ Account №	lame 🛧 NRDS ID	License Number Email	Main Phone
		506010788		
		070005022		
Click on the "Sales and Accounting" navigation area.	.com/main.aspx#566	350880		
		Accounts Active Accounts ×	1	
	 Accounts 	>		
		Events	Sales & Accounting	Elections
		Events	Sales & Accounting	Elections Quick Account
	poards			



Click on the "Purchase Orders" entity.	Sales Corders Corders Invoice Payme Corders Refunct Credits	es ents e Payments	Bull	k Profile Charges k Refund Batches eduled Payments chase Orders	Accounting Se Products Coupons Tax Tables	etup Ad
	Invoice	es ents e Payments	Bull	k Refund Batches eduled Payments	Coupons	
	Payme Payme Invoice Refund	ents e Payments	sch	eduled Payments	Tax Tables	
	Invoice	e Payments				S
	Refund		Pur	hase Orders		
	~	ds			GL Account	
	Credits					ſ
		s				
						-
	35W Cor	rridor Coalition	502001753			763-493-8450
Select and open the desired purchase order to work on	+ NEW 🖌 E	EDIT 🗸 ACTIV	ate 🛛 deact	IVATE <u> </u> DELETE	ະ ເອ EMAIL A LINK	: 🗐 👻 🐯 RUN WO
	🗯 All Pu	urchase (Orders ~			
	P.O. Numbe	er	Order Date 🗸	Expected Date	Vendor	Vendor Invoice
	6		10/22/2019		Varun's 3.5 Upgrade Office	
	✓ 5		10/1/2019		94MAT15Office	
	4		9/24/2019 8/14/2019		94MAT15Office Varun's 3.5 Upgrade Office	
	2		8/14/2019	I	Varun's 3.5 Upgrade Office	
Click on the item PO Wizard						
	×					
	and more! Get Ap	pps for Dynamics 36	55			
	.og 💽 word te	EMPLATES 🔻	RUN REPORT	▼ 🖉 PO WIZARE	•••	
Enter the number of each item received						
	Purchas	se Order '	Wizard			
	Manage and	l submit your pu	irchase order i	ems.		
	Product	Quantity Expected	Previously Received	Newly R	eceived	# to Write
	Store	1	0	1	0	
	Product 001					



Select the receiving user	Product 744	v
	Total Amount of PO Received:	Date Receive January
	Cutlip, Mike Fox, Thom Lopez, Reggie wecommer, Johnna	Junuary
	Shehata, John Cancel Submit	
Click on submit	Total Amount of PO Received: \$0.00 Receiving User:	Date Receive January
	Cancel Submit	
You may click close when the process has completed	Product 744	
	Total Amount: \$100.00 Receiving User:	Date Receive 1/3/2020
	Lopez, Reggie	

2.4.4. Multiple Product Pickup Locations During Store Sales

Open the Navigation Area

•	Meetings Active Meetings - Micro	× (+)			
÷	\rightarrow C $\hat{\mathbf{C}}$ ramcosandbo	ox.ramcoams.org/ma	ain.aspx#366640	923	
7	RAMCO	Events ~	Meetings >		
+ 1	NEW 🛅 DELETE 🛛 👻 EM	MAIL A LINK 🛛 👻 📑	Lvents RUIN REPORT -	EXCEL TEMPLATES	- 4
	A 11 A 11				
	Active Meeting		End Data	Maufasura Danisharifa	Guerrat
	Name	Begin Date \downarrow	End Date		Current
	5	Begin Date ↓ 12/1/2020 12:00		Maximum Registratio 3 3	Current

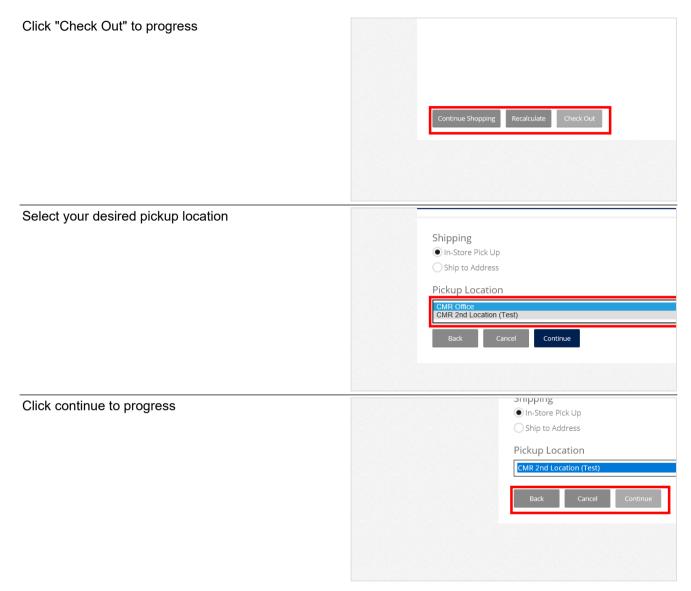


Click on the navigation area Workplace	Meetings Active Meetings - Mici	× +	
	\leftrightarrow \rightarrow C $$ ramcosandb	oox.ramcoams.org/main.aspx#3	66640923
	۶ RAMCO	Events ~ Meetin	gs >
	Workplace Workplace	Membership	Events s
	Classes		Meetings
	Courses	Designations	Meetings
Click on the Contacts entity	Workplace	Membership	Events S
	Customers	My Work	Quick Membership Q
	Accounts	Dashboards	Memberships
	Contacts	Activities	Committees
	Contacts	Reports	Dues Cycles
		Data Management	
	Test Committee - July	7/7/2020 12:00 3/31/2020	8:00 3
Open a contact	F RAMCO	Workplace ~ c	ontacts >
	🕂 NEW 🖌 EDIT 🗸 ACTIVATE	🛛 🕼 DEACTIVATE 🗴 🗴 DELETE	✓ ☐ MERGE SEND DIRECT EMAI
	➡ Search Results	~	
	✓ Last Name ↑ First Name ↑		
	Last Name 1 First Name 1 Bair Jeremy Baldino Julie	NRDS ID Username 863500367 TestUser3 861006248 TestUser3	941 <u>Appraisal Source Northwest</u> <u>KITTIT</u>
	Bair Jeremy Baldino Julie Blasdel Jeremy	863500367 TestUser3 861006248 TestUser3 871014542 TestUser4	941 Appraisal Source Northwest KITTI 715 Keller Williams Realty Pre CLARI 036
	Bair Jeremy Baldino Julie	863500367 TestUser3 861006248 TestUser3	941 Appraisal Source Northwest KITTI 715 Keller Williams Realty Pre CLARI 036 995
	Bair Jeremy Baidino Julie Blasdel Jeremy Valentine Blasdel	863500367 TestUser3 861006248 TestUser3 871014542 TestUser4 876001594 TestUser3	941 Appraisal Source Northwest KITTI 715 Keller Williams Realty Pre CLARI 036 995
Click on the command button MORE COMMANDS	Bair Jeremy Baidino Julie Blasdel Jeremy Valentine Blasdel	863500367 TestUser3 861006248 TestUser3 871014542 TestUser4 876001594 TestUser3	941 Appraisal Source Northwest KITTI 715 Keller Williams Realty Pre CLARI 036 995
Click on the command button MORE COMMANDS	Bair Jeremy Baidino Julie Blasdel Jeremy Valentine Blasdel remy Van Dam Jeremy	863500367 TestUser3 861006248 TestUser3 871014542 TestUser4 876001594 TestUser3	941 Appraisal Source Northwest KITTI 715 Keller Williams Realty Pre CLARI 036 995
Click on the command button MORE COMMANDS	Bair Jeremy Baidino Julie Blasdel Jeremy Valentine Blasdel remy Van Dam Jeremy	863503867 TestUser3 861006248 TestUser3 871014542 TestUser3 876001594 TestUser3 864500261 TestUser4	941 Appraisal Source Northwest KITTI 715 Keller Williams Realty Pre CLARI 036 995
Click on the command button MORE COMMANDS	Bair Jeremy Baidino Julie Blasdel Jeremy Valentine Blasdel remy Van Dam Jeremy	863503867 TestUser3 861006248 TestUser3 871014542 TestUser3 876001594 TestUser3 864500261 TestUser4	941 Appraisal Source Northwest KITTT 715 Keller Williams Realty Pre CLAR 036 995 114
Click on the command button MORE COMMANDS	Bair Jeremy Baidino Julie Blasdel Jeremy Valentine Blasdel remy Van Dam Jeremy	863503867 TestUser3 861006248 TestUser3 871014542 TestUser3 864500261 TestUser4 76001594 TestUser4 77014542 TestUser4 77014542 TestUser4 77014542 TestUser4 Te	941 Appraisal Source Northwest KITTT 715 Keller Williams Realty Pre CLAR 036 995 114
Click on the command button MORE COMMANDS	Bair Jeremy Baidino Julie Blasdel Jeremy Valentine Blasdel remy Van Dam Jeremy	863503867 TestUser3 861006248 TestUser3 871014542 TestUser3 864500261 TestUser4 76001594 TestUser4 77014542 TestUser4 77014542 TestUser4 77014542 TestUser4 Te	941 Appraisal Source Northwest KITTT 715 Keller Williams Realty Pre CLAR 036 995 114
Click on the command button MORE COMMANDS	Bair Jeremy Baidino Julie Blasdel Jeremy Valentine Blasdel remy Van Dam Jeremy	863503867 TestUser3 861006248 TestUser3 871014542 TestUser3 864500261 TestUser4 76001594 TestUser4 77014542 TestUser4 77014542 TestUser4 77014542 TestUser4 Te	941 Appraisal Source Northwest KITTT 715 Keller Williams Realty Pre CLAR 036 995 114



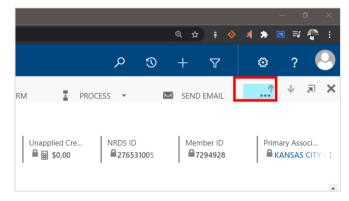
Click on the command button Store		Run Report Radio RAMCO CRM Help Radio RAMCO CRM Help Radio Restivation Wizard Restivation Wizard Registration Registratio	
		Class Registration Class Registration Payment Profile NRDS Sync Password Reset Concernent	155 Klearn (505510505)
Add desired items to your cart	optional] Na	ame / Code [optional]	Shopping Your ca
	Dave's Test Product	Price \$1.00 QTY Add to Cart	
Click the "Add to Cart" button	Key Container	Price: \$9.30	Your cart is empty.
	Dave's Test Product	Price Price: \$1.00 QTY 1 Add to Cart	
	Key Container Key Container	Price: \$9.30 QTY Add to Cart	
Click on the button View Cart	Code [optional] Price Price: \$1.00 QTY Add to Cart	Shopping Cart Dave's Test Product 1 x \$1.00 Subtotal: \$1.00 View Cart	





2.4.5. Process a Store Sale

Click on the command button MORE COMMANDS





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.	v.ramcoams.org/CobaltIsv/Sales/PointOfSale/Pi	roductSearch.aspx?uid=(7336AA1D-93B2-E711-9C1D-00 Select Category [optional] All Categories
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.	eposti Party	Price: \$70.00 QTY Add to Cart Price: \$2.95
If you have more to add, simply repeat this step.		QT dd to Cart Price: \$24,99 QTY Add to Cart
Once completed, click the "View Cart" button to view or edit your cart.	Code [optional] Price Price: \$70.00 QTY Add to Cart	Shopping Cart 101 Home Tips 10 × \$2.95 Subtotal: \$29.50 View Cart



Click on the drop-down to select a tender type	Continue Shopping Recalculate Check Out
Click on the button Continue	Payment Option Cash Back Cancel Continue
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	Shipping In-Store Pick Up Ship to Address Pickup Location Default Pickup Location Back Cancel Continue
Click on the button Continue	Shipping In-Store Pick Up Ship to Address Pickup Location St. Joe Back Cancel Continue



Once your payment details are entered, click continue	Payment Amount				
to move on to the next step.	29.50				
	Amount Received				
	29.50				
	Back Cancel Continue				
Click on the button Submit Order & Payment					
	There are no sales orders.				
	Back Cancel 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	X Product GL Account: New Produc X	(+)
	sandbox.ramcoams.org/main.aspx#331193779	
	Sales & Accou	. 🗸 Products > Product: 2022 Loca
	🕫 CLONE 🗣 REVISE	🛱 RETIRE <u> </u> DELETE
	duct: 2022 Local	Dues =
Choose the Products entity	Membership	Events Sales &
Choose the Products entity	Membership	
Choose the Products entity	Membership Bulk Profile Charges	Accounting Setup Accou
Choose the Products entity		Accounting Setup Accou
Choose the Products entity	Bulk Profile Charges	Sales & Accounting Setup Products Products



Open the product in question	← → C	
	FAMCO Sales & Accou ~	Products
	🖬 ADD FAMILY 💼 ADD PRODUCT 📅 ADD BUI	NDLE
	➡ A Products, Families & Bundles ▼	
	✓ Name ↑ Product ID List Product ID ■ 2020 Local Dues 2020 Local Dues	rice
	2020 National Duce 2020 National Duce	
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 Sta	, ,
	Publish to POS Store Yes	
		F
	On 6/19/2020 2:27 PM	(Status
	On a 6/19/2020 2:27 PM By a SYSTEM	Status Status Reaso
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 Source Total Cost of Inventory	
	PRODUCT VISIBILITY	
	Publish To Online Stor Yes	F
	Publish to POS Store	
	Yes	F
	On 6/19/2020 2:27 PM	Status
	By 🔒 SYSTEM	Status Reaso
Click Save to complete		
	PAYMENT SETTINGS	
	Default Price List * Non-Member	
	Payment Application Prio 🔒 1,038	
	Credit Application Priority 🔒 atus Active	•
	atus Active atus Reason Active	
	unsaved c	hanges 📘
		6 PM 9/2021 🔁



2.4.7. Receive Purchase Order Inventory

Open the Navigation Areas	Product GL Account: New Produc × + sandbox.ramcoams.org/main.aspx#235163169				
	Sales & Accou Purchase Orders > PO10007				
	🕞 DEACTIVATE 🏛 DELETE 🖘 EMAIL A LINK 🥳 RUN V				
	амсо 7 -=				
Choose the entity "Purchase Orders"	Sales Accountin				
, ,	Orders Bulk Profile Charges Produc				
	Invoices Bulk Refund Batches Coupo				
	Payments Scheduled Payments Tax Tal				
	Invoice Payments Invoic				
	nefunds				
	Credits				
Open the Purchase Order you wish to receive inventory for	★ All Purchase Orders ★				
	P.O. Number Order Date Expected Date Vendor PO10007 3/29/2021 Affordable Rentals L				
	PO10006 4/24/2020 Vendor 01				
	PO10004 4/21/2020 Vendor 01				
	PO10003 4/7/2020 Vendor 01 PO10005 4/6/2020 4/24/2020 Vendor 01				
	PO10002 8/15/2019 2677 Test office				
Click on the command button MORE COMMANDS	–				
	л छ + т 💩 ? 😔				
	ATES RUN REPORT MORE COMMANDS				



Click on the command button PO Wizard	- 미 ×
	2 3 4 7 0 ? ○
	ATES V IN REPORT V
	PO Wizard Image: Other Activities
	🗐 Form Editor
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 Previously Newly Received # to Write Off Expected Received Received # to Write Off # to Write Off
	10 Pack 100 0 [p 0
	Total Amount of PO Received: Date Recei
Select your user account from the drop-down	(10%) Off)
	Total Amount of PO Received:
	so.oo Receiving User:
	Lopez, Reggie 🗸
	Cancel Submit
If you need to adjust the unit cost check this box.	
	Write Off Quantity Backordered Unit Cost
	010
	te Received:
	rch • 29 • 2021 •



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.					
	/rite Off	Quantity Ba	ackordered	Unit Cost	
		010		2 \$ 0.00	
	Received: h	~	29 🗸	2021 🗸	
Click on the button Submit			Total Am \$0.00 Receivin	nount of PO Receive g User:	d:
			Lopez, Re Cancel	ggie	
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

VORD TEMPLATES 🔻	🕑 RUN REPORT 🔻	••••			
			Co Cu	ntact ⁺ tlip-R35-01,	Mil : \$9



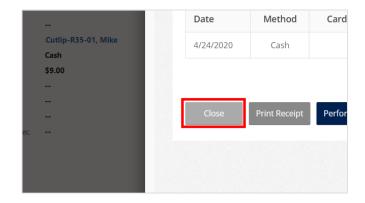
Click on the command button Payment Wizard					
	/ORD TEMPLATES 👻 [🕑 RUN REPORT 🔻			
			Bulk Payment A	elp	An /i : \$9
	\$9.00 nt \$0.00			ECOMM	ERCE REQU
Choose the appropriate refund or unapply payment action.	 Cutlip-R35-01, Mi Cash	ike _	Unapplied		
	\$9.00 ec		What would want to ref l want to un payment. l want to un l want to un	apply some c	re amou of this pa of this pa
Click on the button Continue		payment. I want to	unapply some of unapply some of unapply some or unapply and can Continue	this payment all of the am	and ref ount app
Click on the Return Inventory drop down field to view store locations.			e unapplied fr not you want		
		Cancel Invoice	Return Inventory	Invoice #	Dat
		Yes 🗸		INV-01030- Gelect the location to v eturn the quantity of t	
		o <mark>uld you like</mark> a Check Refund	to refund the	payment?)



Select the store location where inventory should be returned.	choose whether or not you want to cancel the ind					
	Cancel Invoice	Return Invoice # Dat Inventory				
	Ves 🗸	No V INV-01030- 4/24/2 No 0 Alternate Store Location				
	How would you like Issue a Check Refund Refund in Cash	Default Store Location to reland the payment?				
Select the appropriate refund type (If Applicable).	-	Yes Vefault S				
	Rec	How would you like to refund Olssue a Check Refund Refund in Cash				
	-	Cancel any Contributions tha				
Click continue to view summary page.		Make refund to alternate Ass				
ener continue to new cummary page.	Cancel any Contribut	ions that may exist for the Invo				
	Make refund to alter	nate Association or Account. [or				
	Back Close	Continue				
	📄 🏦 🥝 🔤 🔽 🔫 🤤	3 🔌 😑 🕻 🛽 🕯				
Click submit to process payment action and return items to inventory.	Refunded	\$0.00				
	Unapplied	\$0.00				
	Status	Inactive				
	Back Close	Submit				
	📄 💼 🥜 📖 🔽 😜 🎚	3 💥 😑 🕻 🗵 🗎 🀼				



Click on the button Close



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.

•	
	amcotest.com/main.aspx#169194772
	prkplace 🗸 Contacts > Ramco, Remmy 🗸
	MARKETING LIST 🖧 ASSIGN 🖘 EMAIL A LINK 🗙 DELE Ramco, Remmy 📱 PROCESS 👻 📿 SHARE 🚥
	ımy ≝
Click on the "Committee Memberships" entity.	
	Membership Applicati 📄 Designations 📳 Invoices
	Member Financials
	Member Demographic Scheduled Payments
	Committee Members Committee Memberships Committee Memberships
	Member Status: Member Status: Primary Association: Office: Designated REALTOR®: Last COE:



Click on the Waffle to Expand the view of Committee Memberships	
	+ 🔳
	Position Term Begin D Term End Dat Status Reason Creater 1/1/2021 1/1/2022 Current 4/26/202*
Click on the command button Add New Committee Membership	Jensen, Mary =
	Committee Membership Associated View - + add New COMMITTEE M. IL CHART PANE - P RUN
	Committee Contact ↑ Posit
Search for the committee	COMMITTEE MEMBERSHIP : RAMCO New Committee Me =
	Contact * Ramco, Remmy Term Begin Date * Committee *
Set the position	mittee Me=
	Ramco, Remmy Term Begin Date* Committee Name Term End Date* Image: Committee Name



Select the appropriate position for this committee member.		^{committee} membership∶ramco New Committee Me… <i>•</i> ≡		
	Ciated Vie RT PANE - RL Contact 1	Contact * Committee * Position	Ramco, Remmy Committee Name 2014 Active 9/11/2019	Ter Ter O Po 9 10:54 AM
			🚜 Vice-Chair	9 10:55 AM 9 10:55 AM + 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	 	i⊠ ∨
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	1/1/2020 		2
Click Save & Close to complete the process.	• +			
Click Save & Close to complete the process.		✓ Contacts	Committee Membership: New Committee Membersh	spx?etc=10120& ittee Me RM FDITOR mbership.
	ership Asso	ociated Vie	Contact* Ramco, Remmy Committee * Committee Name	P

Please restart this assist from a contact record.



Add New Office in NRDS for an Existing Member 3.1.2.

The new member app wizard lets you add an office while adding a member. Sometimes, the broker is already a member, so you	eggie@ramcoams 🗙 🚦	Accounts Active Acco	ounts - Micro 🗙 📕 Processes M	y Processes - Micros 🗙 🏻 🕇
	amco37uat.ramcotest.com/main.aspx#121836232 MCO Work bubble No-code a ★ San Antonio Punch			
cannot use the app wizard for them again. Instead, we	.MCO 📙 Work 👆 Bul	bble No-code a 🕇	San Antonio Punch	
must add the office without going through the app wizard.	AMCO	Workpla	ace < Accounts >	>
To begin, Open the Navigation Areas.	EW <u> </u>	ete 🗸 👻	C EMAIL A LINK	- → RI
	ve Account	S ¥		
	unt Name 🛧	NRDS ID	License Number Email	Main Phone
From the workplace area, choose "Accounts"	Workplace		Membership	Events
	Customers		My Work	Quick Mer
	Accounts	;	Dashboards	Membe
	Contacts		Activities	2 Commi
			Reports	Dues C
			P. Data Management	
Click on the command button New	Accounts Active Acco			
	← → C i ra		t.com/main.aspx#554808592 ble No-code a 🕇 San Antonio	Punch
	👂 RAI	MCO	Workplace 🗸	Accounts >
	+ NEW	m DELE ew eate a new Account rec		EMAIL A LINK
			NRDS ID License Nu	
	Account Na		CORRECT LICENSE INU	mber Email
Enter the Office name			n. <u>–</u>	
	JMMARY			
	OUNT INFORMATION	I		
	ount Name *			

--

ary Contact

e Contact



Add the Broker or Principal to the Primary Contact field	JMMARY OUNT INFORMATION Dunt Name* Keller Williams South Dunt Name * Keller Williams South Dary Contact Ce Con
Add an email for the office	IL AND WEBSITE Office
 Enter Street address Enter the city name Choose the state Enter the zip code 	il Address 3 site 123 Elm Street 1 Oz 2 ovi * Kansas 3 tal C 4 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@ramcoams X Account: New Account X Processes: My Processes ← → C iii ramco37uat.ramcotest.com/main.aspx#111454850 iii Apps RAMCO Work Bubble No-code a T San Antonio Punch Ø RAMCO Work Bubble No-code a T San Antonio Punch Ø RAMCO Work Bubble No-code a T San Antonio Punch Ø RAMCO Work bubble No-code a T San Antonio Punch Ø RAMCOO Work bubble No-code a T San Antonio Punch Ø RAMCO Workplace Accounts > New Image: Save Image: Save Image: Save FORM Account : RAMCO New Account : RAMCO New Account :=



Click on the link Add Office Membership record.		NRDS ID	
	Offic	ice Memberships 🕂 🖽	
		Status Reason Primary Association State Associati No Office Membership records found.	
Enter the local association	Sou ⁻		
	outh	Office * Keller Williams South NM Primary Association No NF Association * P ta State Association *	
Click on the lookup Association	Sou		
	outh	Office * Keller Williams South NM Primary Association No NF Association * st cloud pt State Association *	
		MLS INFORMATION	
Enter the state association		Office* Keller Williams South NN	
	outh	Office Keller Williams South NN Primary Association No NF Association State Association State Association	
		MLS ID La: MLS Status	



Enter the number of Non-member Salespersons in this office. This is usually 0 to begin with.	Pr = uth NM Salesperson Count * NRDS Timestamp <u>Select to enter data</u> ISSOCIATION OF Status Reason Active IP COCIATION OF RE
Click save to complete the membership.	coams X 👫 Account: Keller Williams South X 👫 Processes My Processes - Micros X 🕇 San Anto
Next we will need to submit this brand new office to M1.	Work b Bubble No-code a T San Antonia Framco37uat.ramcotest.com/main.aspx?etc=10193
To do so, we must submit a workflow.	CONNECT CONNEC
Click on the command button Run Workflow	nch List - Google X +
	CIATION OF REALTORS® - Google Chrome
	aqs=%3f_CreateFromId%3d%257bA3AD9E85-6430-EC11-9C6F-00155D630F03%257d%26_Cr Q
	aqs=%3f_CreateFromId%3d%257bA3AD9E85-6430-EC11-9C6F-00155D630F03%257d%26_Cr Q Dership ~ Office Memberships > Keller Williams Sout >



Click add.	4 1 - 1 of 1 (1 select	ted) M ∢ Page 1 I Add Cancel Remove Valu
Click ok to complete the process.	 10/18/2021 6:4. Lopez, Reggie 	2 Modified On Modified By Lopez, Reggie Status Reason Look for Show Only Con Demand Workflows
This office has now been added to M1 with a new NRDS ID. You can now process an applicaiton and choose this office during the process.	Office * Primary Associat Association * State Association	Confirm Application of Workflov This workflow will be applied to 1 Office Membership.
	MLS INFORMA [®] MLS ID MLS Status	You can monitor workflow jobs by opening each Office Membership an Are you sure that you want to continue?

3.1.3. Create New Office for Existing Broker

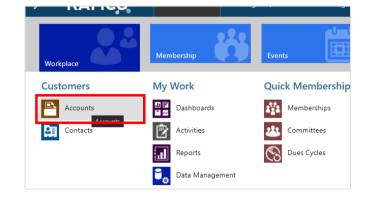
Click on the navigation button Events	👔 RAPB: Tags - reggie@ramcoams. 🗙 📔 🍯 Sent Mail - lopezrme@gmail.com 🗙 🛛 🌚 Sign In
	→ C armcosandbox.ramcoams.org/main.aspx#444766846
	RAMCO Events - Meetings > RAMCON Meeting T
	🕇 NEW 🗟 DEACTIVATE 🏛 DELETE 🖘 EMAIL A LINK 🛞 RUN WORKFLOW 🗈 START DIALOG
	MEETING REGISTRATION FEE : RAMCO RAMCON Meeting Test -=
	Name* RAMCON Meeting Test Meeting* 2020 RAMCON Meetings Test
Click on the navigation area Workplace	🍯 RAPB: Tags - reggie@ramcoams: 🗙 📔 🍯 Sent Mail - lopezrme@gmail.con: 🗙 📔 🌍 Sign In
Click on the navigation area Workplace	 KAPB: Tags - reggie@ramcoams. x Y Sent Mail - lopezrme@gmail.com x Sign In ↔ → C in amcosandbox.ramcoams.org/main.aspx#444766846
Click on the navigation area Workplace	
Click on the navigation area Workplace	← → C (a ramcosandbox.ramcoams.org/main.aspx#444766846
Click on the navigation area Workplace	 ← → C (a) ramcosandbox.ramcoams.org/main.aspx#444766846 ✓ RAMCON Meeting T ✓ Workplace ✓ Membership
Click on the navigation area Workplace	 C arancosandbox.ramcoams.org/main.aspx#444766846 RAMCO Events ~ Meetings > RAMCON Meeting T Workplace Workplace Workplace



3.1.3.1.

RAMCO Portal

Click on the link Accounts



Create new Account (Office) record

Click on the command button New	🍯 RAPB: Tags - reggie@ramcoams. 🗙 📔 🍯 Sent Mail - lopezrme@gmail.com 🗙 🛛 🍥 Sign In
	← → C (a ramcosandbox.ramcoams.org/main.aspx#812128519
	FRAMEO Workplace ~ Accounts >
	🕂 NEW 🧰 DELETE 🔽 🖘 EMAIL A LINK 🔽 🗈 RUN REPORT 👻 🖾 EXCEL TEMPLATES 🕈
	★ Active Accounts ★
	✓ Account Name ↑ NRDS ID License Number Email Main F
	1031 Asset Exchange 876000299 509-45
	1st American Realty 876000243 509-57
	2677 T-4-46 122462222 111 2
 Enter the office name Set the broker as the "Primary Contact" Enter the office license number (if applicable) select a relationship type Enter the office email address Enter the office website Enter the office email Enter the office phone number 	Jon Jody Horst & Assoc. Realty EMAIL AND WEBSTE Gappe, Mills Email Address 2 Gappe, Mills Email Address 2
Enter the street address	fax ··· Kolenhood
	123 Elm Street
	Oz
	rovi * Kansas
	tal Cc united states
	/ United States united states



Select a branch type DETAILS COMPANY PROFILE Business Name Corporate Name Formal Name Branch Type Main Office Type Single Main Billing Office ULIAILU Select an office type OMPANY PROFILE usiness Name corporate Name ormal Name Main ranch Type Office Type illing Office Select to enter data Click on the command button Save 🝸 RAPB: Tags - reggie@ramcoams. 🗙 📔 🎦 Sent Mail - lopezrme@gmail.com 🗙 🛛 🍮 Sign In C armcosandbox.ramcoams.org/main.aspx#189227932 4 \rightarrow RAMCO. Workplace ~ Accounts > New Account 🔜 SAVE 📲 SAVE & CLOSE 🕂 NEW 🖼 FORM 🍥 RAMCO CRM HELP АМСО New Account 🛥 SUMMARY

RAMCO Portal

3.1.3.2. Add new Office Membership record

Click on the link Add Office Membership record.

	NRDS ID Ow	vner * Last name, Fills
Office Memberships		+
Status Reason	Primary Association	Add Office Membership red
No Office Membershi	p records found.	

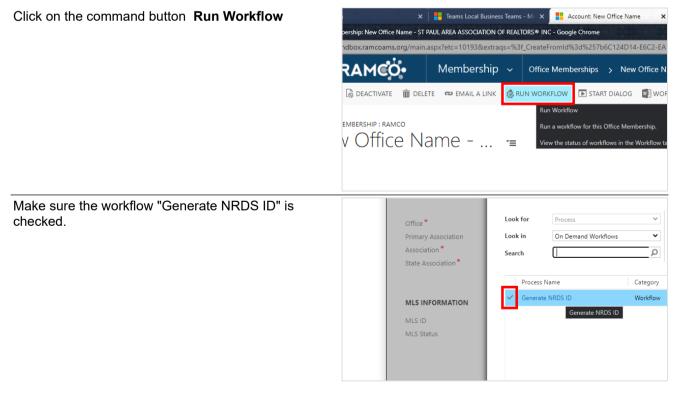


Office * New Office Name Primary Association * State Association *
MLS INFORMATION MLS ID MLS Status
Choose your association from the list
Office * New Office Name NM
Primary Association No NRD
Association ST PAUL AREA ASSOCIATION OF REALTORS OF STATUS State Association * US PAUL AREA ASSOCIATION OF REALTORS OF STATUS S060 JFridington@spaar.c Look Up More Records ST PAUL AREA A SSOCIATION OF REALTORS OF STATUS
MLS INFORMATION
MLS ID Last
MLS Status
Click in the state association field and search for your association
Office * New Office Name
Primary Association No
Association ST PAUL AREA ASSOCIATION OF REALTORS
State Association *
MLS INFORMATION
MLS ID MLS Status
Choose your association from the list
Office * New Office Name Primary Association No
Primary Association No
State Association * minne P
MLS INFORMATION
MLS ID
MLS Status



Enter the number of non-member salespersons in this office	
	···· *=
	NM Salesperson Count *
	NRDS Timestamp Select to enter data CIATION OF REALTORS © Istatus Reason Active
Click on the command button Save	ncoams: 🗙 📔 🖌 Sent Mail - lopezrme@gmail.com 🗙 🗌 🌍 Sign In 🛛 🗙 🛛 👫 Teams Lo
	osandbox.ramcoams.org/main.aspx#189227932 Groen Office Membership: New Office Membership - Google Chro
	🚺 Workplace - Accc 🗲 RAMCO Memb
	T 🗸 🚰 ADD TO MARKETING LIST 🏶 ASSIC
	ramco ∧ Office Name = Save this Office Membership. New Office Member

3.1.3.3. Run the "Generate NRDS ID" workflow





Click on the button Add	Generate NRDS ID Workflow 5/4/2017 2:10 PM 6/11/2020
	Add Cancel Remove Value
Click on the button OK	Look for Process Y Show Only My Records
	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 clicking Workflows. Are you sure that you want to continue?
	OK Cancel
Click to close the office membership record.	ION OF REALTORS® INC - Google Chrome -
To see the newly generated nrds id, you may refresh	extraqs=%3f_CreateFromId%3d%257b6C124D14-E6C2-EA11-9C38-00155D007997%257d%26 Q
the page or press F5 on a windows pc.	nip V Office Memberships Vew Office Name
	INK 🔞 RUN WORKFLOW 🗈 START DIALOG 📳 WORD TEMPLATES 👻 🚥
	=
	NM Salesperson Count * 0

3.1.4. Deactivate a Membership

Click on the link Form Sections	RAMCO Workplace ~ Contacts > Ramco, Remmy
	NEW 😼 CONNECT 🛛 👻 📑 ADD TO MARKETING LIST 🛔
	CONTACT : RAMCO Ramco, Remmy T



Click on the link MEMBERSHIPS	amco, Remmy =		
	AT A GLANCE		
	Jance SUMMARY		
	Funds		
	CLASSES AND MEETINGS		
	AREA ASSOCIATION OF REALTORS ACCOUNTING adary Pending		
	AREA ASSOCIATION OF REALTORS ADDRESSES		
Check the membership you wish to depetivete			
Check the membership you wish to deactivate.	MEMBERSHIPS		
	Membership Sub-Grid 💙		
	Search for records		
	Primary Contact 🛧 NRDS ID Member Type Membe		
	lo Ramco, Remmy 505510506 MLS		
	lo Ramco, Remmy 505510506 MLS lo Ramco, Remmy 505510506 MLS		
	heckbox Ramco, Remmy 505510506 Supra		
Click on the command button Deactivate	FRAME Workplace Memberships >		
	🕂 NEW 🔀 DEACTIVATE 🏛 DELETE 🛸 ASSIGN		
	Deactivate		
	Ramco, Remm ^{Deactivate} these Memberships. You can reactivate these Memberships from the Inactive Mem		
	SUMMARY		
	SUMMART		
	Name Ramco, Remmy - MLS		
User your mouse to scroll up or down.	Contact Ramco, Remmy		
	ACTIVITIES NOTES		
Choose a deactivation status from the list.	Enter a note		
Choose a deactivation status from the list.	Enter a note		
Choose a deactivation status from the list.			
Choose a deactivation status from the list.	Enter a note N OF REALTORS CONFIRM Deactivation DO you want to deacuvate the selected + Membership: You can reactive		
Choose a deactivation status from the list.	Enter a note N OF REALTORS CONFIRM Deactivation		
Choose a deactivation status from the list.	Enter a note Confirm Deactivation N OF REALTORS DO you want to deacuvate the selected + Membership + Fou can reactiv This action will change the status of the selected Membership to Inactiv		



Click deactivate to confirm.

the status of the selec	ted Membership to	Inactive.		4
	_	Deactivate	Cancel	Applicatio
				Conta
				No Membe

Please restart this assist from a contact record.

3.1.5. Approve Committee Nomination

approved.	
	Committee Nominations Sub-Grid (Commit Y
	Search for records
	Status Reason Name 🛧
	ending Ramco, Remmy - Committee Nam
	Modified On A 3/26/2020 1-36 PM
Click on the command button Run Workflow	ommittee Nomination: Ramco, 🗙 🕂
	C a ramco35uatupgrade.ramcotest.com/main.aspx#845860700
	RAMCO Workplace ~ Committees > Ramco, Remmy - Co >
	EW 🗟 DEACTIVATE 💼 DELETE 🖚 EMAIL A LINK 💰 RUN WORKFLOW 🗈 START DIALOG 👼 WORD TH
	Run Workflow
	MITTEE NOMINATION : RAMCO
	amco, Remmy - Committee View the status of workflows in the Workfl
	minee * Ramco, Remmy
	nmittee* Committee Name
	mination Form Response
Select the "Approve Nomination" workflow	Enter your search criteria.
	Look for Process T
	Look in On Demand Workflows
	Search D
	Process Name Category
	Approve Nomination Workflow



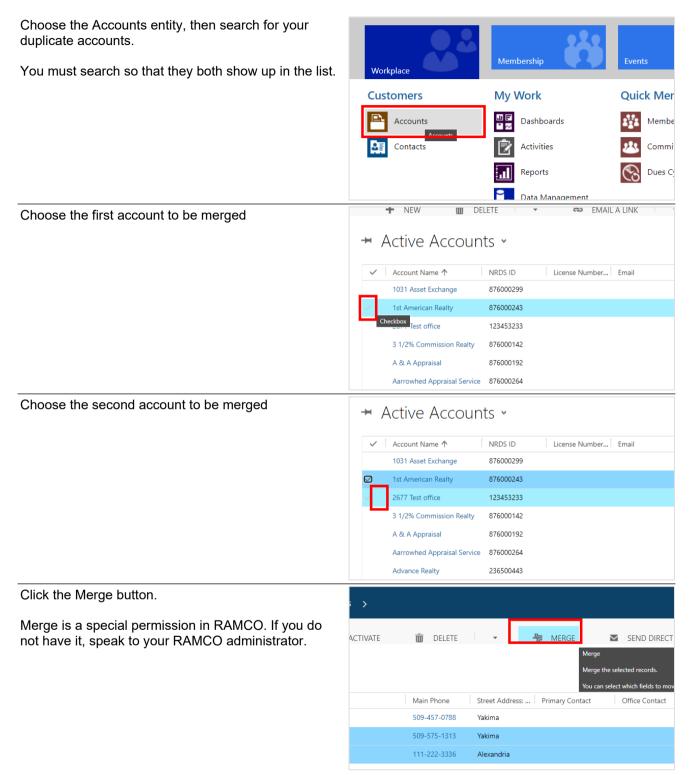
Click on the button Add	Add Cancel Remove Value
Click on the button OK	Confirm Application of Workflow Inis workflow will be applied to 1 Committee Nomination. You can monitor workflow jobs by opening each Committee Nomination and clicking Workflows. Are you sure that you want to continue? OK Cancel OK I - 1 of 1 (1 selected) H

Please restart this assist from a committee record.

3.1.6. Merge Duplicate Account Records

Open the Navigation Areas	AMCON Workplace Accounts > Norkplace EW Delete C EMAILA LINK C T I RL Ve Accounts >		
	Int Name 🛧 NRDS ID License Number Email Main Phone		
	Asset Exchange 876000299 509-457-07		
	nerican Realty 876000243 509-575-13		
	Test office 123453233 111-222-33		
Choose the Workplace area	Purchase Order: PO10007 × Product GL Account: New Produ: × +		
	← → C		
	F RAMCO Sales & Accou Purchase C		
	Workplace Membership Events		
	Sales Accounting		
	Orders Rulk Profile Charges Product		







Choose a account to be the master record. The other account will be merged into this one.	? ect the fields to merge into the master record.			
	1st American Realty	2677 Test office		
	1st American Realty			
	Select all fields in this section	Select all fields in this record n		
		123453233		
	Select all fields in this section	Select all fields in this section		
	1st American Realty	2677 Test office		
Use the radio buttons below to choose which field to	Te: AutoPay My Dues)		
keep when the contacts have different values.	mi Customer Size	Default Value		
	BUSINESS DETAILS	Select all fields in this section		
	mi Member Designated Realtor	No		
	WEB PORTAL DETAILS	Select all fields in this section		
	mi Username) <mark>1</mark> estUser3974		
	mi Password 🔋 🔿)1000:SXSFMnqnFytOJ2Vn5dkwZv025fY+dT75:hUP		
	Password Update Date)4/18/2020		
	mi Password Update Required	No		
	Last Portal Login)		
Click OK to complete the merge.	S(10/2020 2-11 DM			
	6/19/2020 2:11 PM 6/19/2020 2:11 PM			
	(No)urham		
	Yes			
		OK Cancel		
	L M N O P	Q R S T U		
Click OK to complete the merge	Allow			
	Allow	.:37 1/1		
	cords have data in the same field, the master record field is s	elected ::22 1/1		
		::22 1/1		
	ecord's child records. The subordinate record will be de	eactivated.		
		OK Cancel ::28 5/4		
		ок 1 5/28/2019 12:22 1/1		
	Elwell, Paul Elwell, Paul	1/22/2021 10:34 1/2		
		53 5/28/2019 12:57 1/1		
		/ 5/28/2019 12-26 1/1		



3.1.7. Merge Duplicate Contact Records

Open the navigation areas	🗙 🔡 Product GL Account: New Produc 🗙 🃋 🛨
	sandbox.ramcoams.org/main.aspx#617816929
	Sales & Accou V Purchase Orders > PO10007
	Sales & Accounting
	🗟 DEACTIVATE 🧰 DELETE 🖘 EMAIL A LINK 🗔 RUN W
	амсо
	7 -=
Choose the workplace area	Purchase Order: PO10007 x Product GL Account: New Product x + ← → C ● ramcosandbox.ramcoams.org/main.aspx#617816929
	FRAME Sales & Accou Purchase (
	Workplace Membership Events
	Sales Accountin
	Orders Bulk Profile Charges Produc
Choose the Contacts entity, then search for your duplicate contacts.	Workplace Membership Events
You must search so that they both show up in the list.	Customers My Work Quick Mer
	Accounts Dashboards Membe
	Contacts 😥 Activities 🚨 Comm
	Reports Dues C
	Data Management
Select the first contact to be merged	
	✓ Last Name ↑ First Name ↑ NRDS ID Username Parent Cus
	Adams Dee 876000609 TestUser3816 Mike Cutlin
	Ahlbrecht Richard 876000128 TestUser3750 Mike Cutlin
	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
	сопр-заповоло инке пикеситроз



Select the second contact to be merged.	← Search Results -					
	✓ Last Name ↑ First Name ↑ NRDS ID Username Parent Cus					
	Adams Dee 876000609 TestUser3816 Mike Cutij					
	Ahlbrecht Richard 876000128 TestUser3750 Mike Cutli					
	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					
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.	ect the fields to merge into the master record.					
	🕽 🔄 Cutlip, Mike					
	Select all fields in this section Select all fields in this section Mike Mike					
	Select all fields in this section Select all fields in this section					
Use the radio buttons below to choose which field to	Te AutoPay My Dues					
keep when the contacts have different values.	m Customer Size Default Value					
	BUSINESS DETAILS O Select all fields in this section					
	mi Member Designated Realtor					
	WEB PORTAL DETAILS O Select all fields in this section					
	usemame OlestUser3974					
	Password P					
	Passwold Opdate Date					
	m Password Update Required No Last Portal Login O					



Click OK to complete the merge.

	© 5/19/2020 2:11 PM © 5/19/2020 2:11 PM © No © Yes					Durham			
_]	OK CK		Cancel		
L	М	N	0	Р	Q	R	S	т	U

3.1.8. Perform an Office Transfer

Click on the link Form Sections	← → C a ramco35uatupgrade.ramcotest.com/main.aspx#535922643					
	RAMCO Workp	lace ∼ Contacts > Ramco, Remmy >				
	+ NEW CONNECT → PADD TO MARKETING LIST SAASSIGN © EMAIL A LINK × DELETE TO CONTACT : RAMCO Ramco, Remmy					
	AT A GLANCE					
	Local Data					
Click on the link MEMBERSHIPS						
	Ramco, Remmy	·=				
	AT A GLANCE	AT A GLANCE SUMMARY MEMBERSHIPS CLASSES MEMBERSHIPS				
	Local Data Remmy Ramco Membership: Member Type: Member Status: Primary Association:	ACCOUNTING ADDRESSES DEMOGRAPHICS AND MARKETING AI360 AND REALTOR PARTY HUB				
Open the membership record to perform the office transfer.	MEMBERSHIPS					
	Membership Sub-Grid ▼ Search for records					
	No Ramco, Remmy Primary Membership	REALTOR R Active				



Click the waffle icon to expand the list of office transfers	ΑΙΧ Ψ Τ
	Primary Membership Member Type" NRDS ID
	All Office Transfers V + 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 NEW OFFICE TRANSF Add New Uffice Transfer Membership Add a related Office Transfer to this record. New Office
Click on the lookup New Office	office transfer : RAMCO New Office Transfer -=
	Membership Ramco, Remmy - REALTOR APPROVAL Current Office * Remmy's Realty Association Staff New Office * Order P Date Approved Order - Designated REALTC
Click on the command button Save	mmy - R × +
	Workplace ∨ Membershi Wembershi SAVE & CLOSE + NEW FORM EDF
	emmy - REALTOR -=
	PT Associated View ~ NSF ADD EXISTING OFFICE TR BULK DEL Membership Ramco, Remmy - REALT Current Office Remmy's Realty



Click on the command button Run Workflow	e Transfer: Re	emmy's Realt	ty - Remmy's	Realty - Google Chi	ome		
				n/main.aspx?etc=	10194&pagety	/pe=entityrecord&	&extraqs=%3f_CreateF
	RA	MCÒ	Rer	nmy's Realty - Re	_		Q
	ew <table-cell> De</table-cell>	ACTIVATE	<u> </u> DELETE	🖘 EMAIL A LINK	👶 RUN WOR	Run Workflow	f DIALOG 🛛 🕅 WORD TE
	ce transfe 2MM		Realty	/ - Re	Έ		for this Office Transfer. of workflows in the Workfl
	mbership rent Office *		Ramco, Remmy	Remmy - REALTOF 's Realty	ł		APPROVAL
Select the "Approve Office Transfer" workflow	ce ealty	Current New O Order	nt Office *	Rer Rer Rar	Enter your sea Look for Look in Search	rch criteria. Process On Demand Workf	iows T
	- 1				Process N		Category
	- 1				✓ Approve	Office Transfer	Workflow
Click on the button Add							
					_		
		1 - 1	l of 1 (1 selecte	ed)			M ▲ Page 1 ►
					Add	Cancel	Remove Value
			-	-			
	3/25/2020	4:25 PM	Мо	dified On	3/25/2020 4	:25 PM	Status
Then click OK to start workflow)ffice *		Rer	ook for Proc	ACC	v	Show Only My Records
			Rar		emand Workflows		Show only my records
				Confirm A his workflow will be		on of Wor :e Transfer.	kflow
			_	You can monitor work Are you sure that yo			r and clicking Workflows.
			L				OK Ca
							UK

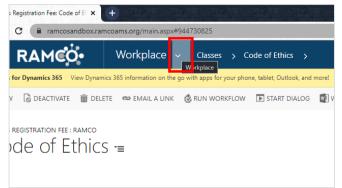


Click on the membership name to return to the membership record.	← → C ⓐ ramco35uatupgrade.ramcotest.com/main.aspx#955863340					
	FRAME Workplace Vertex Memberships > Ramco, Remmy - RE					
	Ramco, Remmy - REALTOR ₌					
	Office Transfer Associated View ~					
	+ ADD NEW OFFICE TRANSF 2 ADD EXISTING OFFICE TR 🕃 BULK DELETE 📲 CHART PANE 👻 🕑					
	✓ Membership ↑ Current Office New Office Status Reason Date					
Click on the contact name to return to the contact record.	MEMBERSHIP : RAMCO					
	Ramco, Remmy - REALTOR ≔					
	- SUMMARY					
	Name Ramco, Remmy - REALTOR					
	Contact* Ramco, Remmy D Office* Memmy's Kealty					
	Primary Membership No					
	Association * NATIONAL ASSOCIATION OF REALTORS® State Association * NATIONAL ASSOCIATION OF REALTORS®					
	Member Type*					
	Member Subclass R					
Open the process payment wizard to pay for the	🗞 Run Workflow					
transfer.	► Start Dialog					
This is the end of the assist.	Word Templates					
	▶ Run Report ▶ ♣ Impersonate					
	Deactivation Wizard					
	Process Payment					
	🗐 Membersh Process Payment					
	Store This wizard will allow you to: Meeting Re					
	Class Regis 2. Create a check payment or process a cred					
	Payment P br>3. Apply the payment					

3.2. Membership (Advanced)

3.2.1. Add Question to Membership App Wizard

Open the Navigation Areas





Click on the link Settings	
	९ 🖈 🧍 🍋 🔶 🍭 🌲 🏇
	P 🕄 + 🎖 😋 ? '
	Service Settings Training
	Extensions
	Lockboxes
Click on the link Forms	Workplace Membership Events
	Content Process Center Business
	Processes Business Managem
	Forms Templates
	Report Text Product Catalog
	Alerts
Click on the command button New	E Forms Active Forms - Microsoft 🛛 🗙 🕇
	← → C (la ramcosandbox.ramcoams.org/main.aspx#264036893
	Forms >
	Apps for Dynamics 365 View Dynamics 365 information on the go with apps for your phone, tablet, Outlook, NEW DELETE ▼ ⇔ EMAIL A LINK ▼ PUN REPORT ▼
	New Create a new Form record.
	✓ Name ↑ Description
	Committee Interest Form Complete this form if you are interested in serv
Give the Form a name	SAVE 🛱 SAVE & CLOSE 🕂 NEW 🍳 RAMCO CRM HELP 🖼 FORM EDITOR
	Jew Form =
	Jame •
	orm Contact
	Aapped Entity Name 📓
	DESCRIPTION



Click on the command button Save	Form: New Form
	← → C (a ramcosandbox.ramcoams.org/main.aspx#262056485
	Forms New Forms
	Apps for Dynamics 365 View Dynamics 365 information on the go with apps for your phone, tablet, Outlook,
	🔜 SAVE 🖁 SAVE & CLOSE 🕂 NEW : @ RAMCO CRM HELP 🔳 FORM EDITOR
	Save
	FORM Save this Form.
	New Form -≡
Click on the command button Launch Designer	
olicit on the command battor Launch Designer	
	>
	more! Get Apps for Dynamics 365
	WORD TEMPLATES T IN REPORT T IN AUNCH DESIGNER
Form must be configured for the process you plan to	
use it in.	
For a membership application form, choose	s or types, select an entity from the related list.
"Membership Application".	
	or Select a Related Entity [optional]
	· · ·
	Vote (Form Response)
	Contact (DO NOT USE - Profile Update Form Response) Committee Nomination (Nomination Form Response)
	Contact (Profile Update Form Response - USE THIS) Election Requirement (Form Response)
Click on the item Membership Application (Form	
Response) in the list	or Select a Related Entity [optional]
	✓
	Vote (Form Response)
	Contact (DO NOT USE - Profile Update Form Response) Committee Nomination (Nomination Form Response)
	Contact (Profile Update Form Response - USE THIS) Election Requirement (Form Response)
	Nomination (Form Response)
	Web Element Submission (Type Form Response) Web Element Submission (Fee Form Response)
	Web Element Submission Requirement (Form Response) Contact (Profile Setup Form Response)
	Class Registration (Form Response)



Click on the button Configure Form	ember Subclass Quest Select an Entity [optional] Save and Close Configure Form
Use this combo box to add mapped questions to your form.	Add Fields (Mapped)
Mapped questions will update the member's data when submitted.	cobalt_cobalt_formresponse_cobalt_me v Field or Related Entity Add Question
Click on the item Membership (Membership) in the list	1 I
	Account (Account) Account (Office) Business Unit (Owning Business Unit) Contact (Contact) Currency (Currency) Member Type (Member Type) <u>Membership (Membership)</u> Membership Application (Saved Membership Application) Membership Application Fee (Membership Application Fee) Owner (Owner) Recurring Payment Plan Option (Recurring Payment Plan Optio Team (Owning Team)



Click on the item Member Subclass in the list] LAUNCH DESIGNER •••	
	Email Address Exclude from Membership Directory Expiration Date Import Sequence Number Join Date Last Renew Date Last Updated Local Orientation Date Member Status Date <u>Member Subclass</u> Membership Subsclass	
Click on the button Add Question	Field or Related Entity	
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	Add Question	
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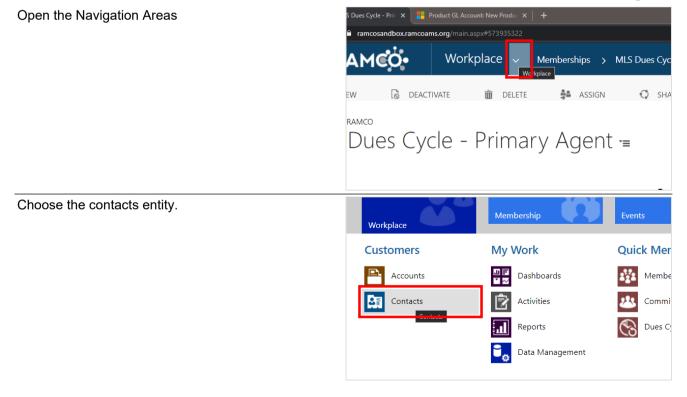


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		istitute Affiliate Member FRO		Yes	Yes
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	<u> ∼</u> <u>R</u>	EALTOR	Yes	Yes	Yes
		EALTOR Associate	Yes	Yes	Yes
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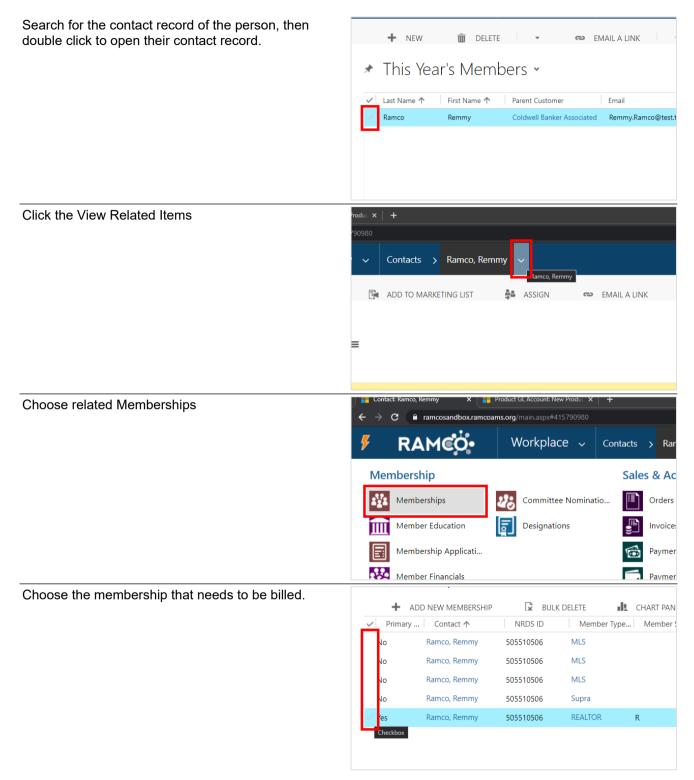


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	On 🔒 12/7/20	MikeC - Committee Nomination Form MikeC - Form Test with Links Image: Source Sour	Acti
Click save to complete the process.		+ 🗉	
The new question will now be asked during any REALTOR applications.	Mode Query Order Paid Query	Member Type Created On REALTOR 10/24/2019 3:29 REALTOR 5/9/2019 12:37 REALTOR 10/24/2019 3:29	
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3.2.2. Create a Dues Bill for a Member who Missed Dues Billing









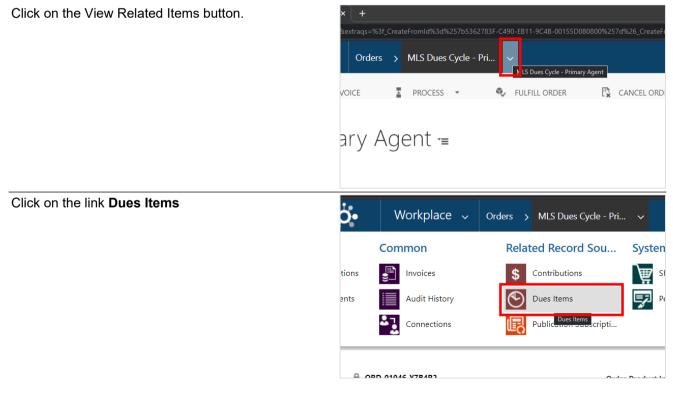
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Select the appropriate billing stage. Ramco, Remmy - REALTOR ship* :le * 2021 Dues Renewal tion * Primary Agents - Full Payment ar H tage Standard trategy Date Late Standard ۵ tion Type Reinstatement Fee Applied Dues Item: New Dues Item - Google Chrome Click on the command button Save & Close prg/main.aspx?etc=10128&extraqs=%3f_CreateFromId%3d%257b3BEF RAMCO. New Dues Item SAVE SAVE & CLOSE + NEW FORM ED DUES ITEM : RAMCO New Dues Item -= Name

RAMCO Portal

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





Double click on Dues Item to open it.			
	Dues Item Associated View ~		
	Dues ner		
		NEW DUES ITEM 🕅 ADD EXISTING DUES ITEM	BI
	✓ Membership		
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	ayment	Group By: (no grouping) 🗸	
	y REALTORS®		
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Click save	
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	ew Dues Order Product -=
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Please restart this assist from an Order record.

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

Yes



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Click on the name of the order that is a mistake or a duplicate bill.	ils Filter on: All	Include: Related "Regarding" Records
		Include: Related "Regarding" Records
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Deactivate the dues item.	📕 Membership: Ramco, Remmy - R 🗙 📑 Dues Item: MLS Dues Cycle - Prin 🗴 🕂
This must be done before cancelling the order, to prevent the member from being shut off.	← → C
	+ NEW DEACTIVATE 🗰 DELETE 😫 ASSIGN
	DUES ITEM : RAMCO
	MLS Dues Cycle - Primary Agent
Choose the "Inactivate" status, any other option could result in the member being shut off.	eactivation × Dues Produ
	ivate the selected 1 Dues Item? You can reactivate it later, if you wish.
	e the status of the selected Dues Item to Inactive.
	Kenewed
	Deactivate Cancel



Click Deactivate to confirm.

the status of the	e selected Dues Item to	o Inactive.			imary Agent
		Deactivate	Cancel	•	

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

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

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	Sales & Accounting Image: Committee Nominatio Image: Committee
	licati S C Payments C C S C C C S C C C S C C C S C
Click on the name of the order the member is not planning to renew	Filter on: Active Include: Related "Regarding" Records
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	<u>MLS Dues Cycle - Primary Agent</u> Contact 05, Example OR



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	_S Dues Cycle - Pri >
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Click confirm to complete the procees.	
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Nothing else needs to be done. The member will be allow to finish out their current membership term. At the end, the member will be inactivated along with all	
Nothing else needs to be done. The member will be allow to finish out their current membership term. At the end, the member will be inactivated along with all	Confirm

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 View Related Items button.	× [+			
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Then click on Recalculate Order, to complete the process.	□ Reading list
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Please restart this assist from an Order record.

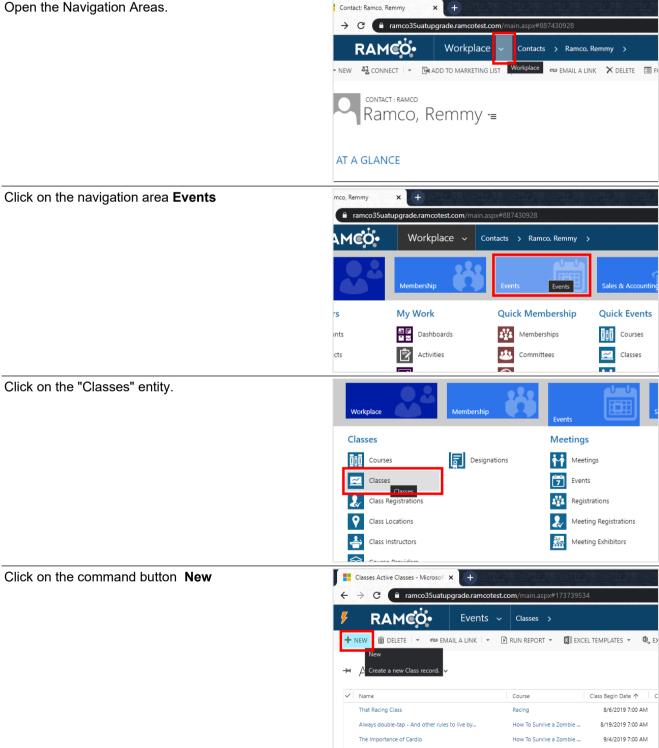


4. Events

4.1. Classes

4.1.1. Add a Class

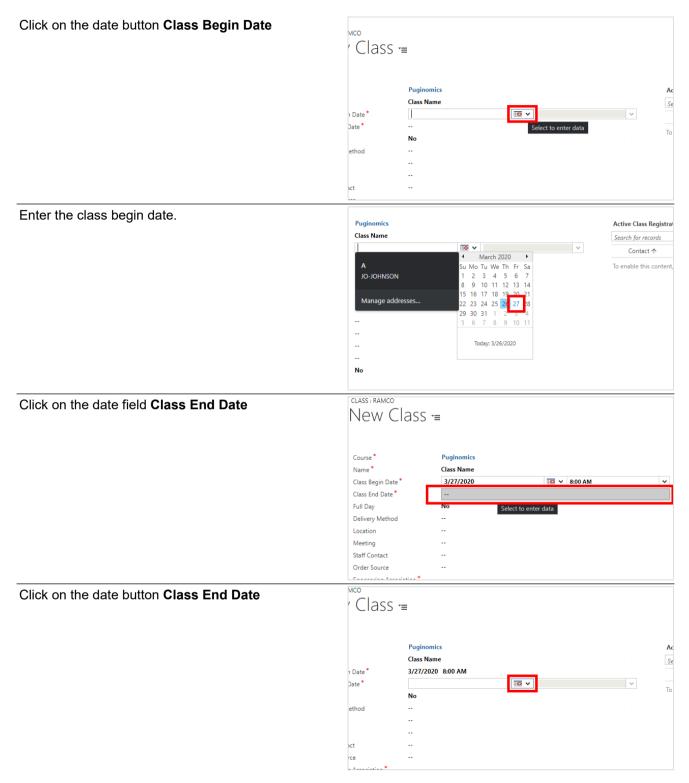
Open the Navigation Areas.





Click on the search button of field Course	1 EDITOR	
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		Contact ↑ C
		To enable this content, create the record.
Search for the appropriate course and select it.		=
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1.	Select a delivery method. (Optional)	3/27/ 3/27 No 	2020 8:00 AM //2020	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM	Conta
1.	Select a delivery method. (Optional)	3/27/ 3/27 No 	2020 8:00 AM (2020 8:00 AM (2020 8:00 AM (2020 2:00 PM Tele Classroom RebEx GoT active Computer Based o (Recorded)	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM	Conta
1.	Select a delivery method. (Optional)	3/27/ 3/27 No 	2020 8:00 AM (2020 8:00 AM (2020 8:00 AM (2020 2:00 PM Tele Classroom RebEx GoT active Computer Based o (Recorded)	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM	Conta
		3/27/ 3/27 No 	2020 8:00 AM //2020 8:00 AM //2020 8:00 AM //2020 2:00 PM Perecent Computer Based p (Recorded)	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM	Conta
1.	Click on the search button of field Location	3/27/ 3/27 No 	2020 8:00 AM //2020 8:00 AM //2020 8:00 AM //2020 2:00 PM Perecent Computer Based p (Recorded)	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM	Conta To enable th
	Click on the search button of field Location Lookup the appropriate location for this class.	3/27/ 3/27 No 	2020 8:00 AM (2020 8:00 AM (2020 8:00 AM (2020 2:00 PM Tele Classroom WebEx GoT active Computer Based 0 (Recorded) m	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM	Conta
1.	Click on the search button of field Location Lookup the appropriate location for this class. If it does not exist, you may click new to	3/27/ 3/27 No 	2020 8:00 AM //2020 8:00 AM //2020 8:00 AM //2020 2:00 PM Perecent Computer Based p (Recorded)	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:30 PM 1:30 PM 2:30 PM 2:30 PM 2:30 PM	Conta To enable th
1.	Click on the search button of field Location Lookup the appropriate location for this class.	3/27/ 3/27 No -	2020 8:00 AM (2020 8:00 AM (2020 8:00 AM (2020 2:00 PM Tele Classroom WebEx GoT active Computer Based to (Recorded) m Zomboss Training Facility	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM	Conta To enable th
1.	Click on the search button of field Location Lookup the appropriate location for this class. If it does not exist, you may click new to	3/27/ 3/27 No -	2020 8:00 AM (2020 8:00 AM (2020 8:00 AM (2020 2:00 PM Tele Classroom WebEx GoT active Computer Based 0 (Recorded) m	11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:30 PM 1:30 PM 2:30 PM 2:30 PM 2:30 PM	Conta To enable th
1.	Click on the search button of field Location Lookup the appropriate location for this class. If it does not exist, you may click new to	3/27/ 3/21 No -	2020 8:00 AM //2020 8:00 AM //2020 8:00 AM //2020 2:00 PM Perfect Computer Based to (Recorded) m Zomboss Training Facility e's Class Location	intia AM intia DAM 1200 PM 1200 PM 1200 PM 1200 PM 200 P	Conta To enable th
1.	Click on the search button of field Location Lookup the appropriate location for this class. If it does not exist, you may click new to	3/27/ 3/21 No -	2020 8:00 AM (72020 8:00 AM (2020 8:00 AM (2020 2:00 PM Tele Classroom WebEx GoT active Computer Based (Recorded) m Zomboss Training Facility e's Class Location sroom Traveler	in 11:00 AM 11:20 AM 12:00 PM 12:30 PM 1:30 PM 1:30 PM 2:00 PM	Conta To enable th
1.	Click on the search button of field Location Lookup the appropriate location for this class. If it does not exist, you may click new to	3/27/ 3/27 No -	2020 8:00 AM //2020 8:00 AM //2020 8:00 AM //2020 2:00 PM //2020 2:00 PM //2020 2:00 PM //2020 Computer Based to (Recorded) ////////////////////////////////////	intia AM intia DAM 1200 PM 1200 PM 1200 PM 1200 PM 200 P	Conta To enable th
1.	Click on the search button of field Location Lookup the appropriate location for this class. If it does not exist, you may click new to	3/27/ 3/27 No -	2020 8:00 AM (2020 8:00 AM (2020 8:00 AM (2020 2:00 PM Tele Classroom WebEx GoT active Computer Based (Recorded) m Zomboss Training Facility e's Class Location sroom Traveler	intia AM intia DAM 1200 PM 1200 PM 1200 PM 1200 PM 200 P	Conta To enable th
1.	Click on the search button of field Location Lookup the appropriate location for this class. If it does not exist, you may click new to	3/27/ 3/27 No -	2020 8:00 AM 72020 8:00 AM 72020 8:00 AM 72020 2:00 PM 72020 2	intia AM intia DAM 1200 PM 1200 PM 1200 PM 1200 PM 200 P	Conta To enable th



1. 2.	Click on the search button of field Staff Contact Lookup the appropriate staff contact.	Cutilp, Mike Cutilp, Mike Dohm, Thomas Fox, Thom Jackson, Phelicia Last name, First name Lopez, Reggie McCormici, Lopez, Reggie 8 results + New
1. 2.	Click on the lookup Sponsoring Association - Enter the sponsoring association's name. Click on the lookup Hosting Association - Enter the hosting association's name.	 Lopez, Reggie n* NATIONAL ASSOCIATION OF REALTORS® 1 n X2 No
Set the	e "Publish to Portal" field.	CLASS : RAMCU New Class : "= Course * Puginomics Name * Class Name Class Begin Date * 3/27/2020 8:00 AM Class End Date * 3/27/2020 9:00 PM Full Day No Delivery Method Classroom Location The Traveler Meeting Staff Contact Lopez, Reggie Order Source
1. 2. 3.	Set the registration begin and end date. This controls the window of time where people can register for this class. Click on the date button Registration Begin Date Click on the date button Registration End Date	Snonsoring Association* NATIONAL ASSOCIATION OF REALTORS® nvitation Only* No Registration End Date 3/1/2020 8:00 AM Wax Attendance Eligible for One Click Registr No Allow Waitlist No Waitlist Automated Promotic



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
	Registration End Date 3/27/2020 IIII V 8:00 AM V Max Attendance
	Eligible for One Click Registr No Select to enter data Allow Waitlist No
	Waitlist Automated Promotic
	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 Promotic
	FINANCIAL
1. Enter the preview summary Set the class	
description.	x' T+ 17- HI- Ta 😲 그 드 드 클 클 클 = 이 (이 드 🔳 🤫 🚸 🐒
2. Enter the cancellation policy.	x' T• ff• H• T ₂ 势 <u>4</u> 臣 臣 律 律 匡 喜 君 重 9 04 트 團 % 参 ǎ
	1+2+
Click on the toggle field Outside Provider	
	FINANCIAL
	Revenue Recognition Date +
	OUTSIDE PROVIDER
	Outside Provider No
	Link
	DESCRIPTION & INSTRUCTORS



Click on the field Message		
	FINANCIAL	
	Revenue Recognition Date *	
	OUTSIDE PROVIDER	
	Outside Provider Message	Yes
	Link	
	DESCRIPTION 8	k INSTRUCTORS
	Preview Summary	
	Enter preview summary	
Enter Message.	FINANCIAL	
	Revenue Recognition Date *	
	OUTSIDE PROVIDER	
	Outside Provider	Yes
	Message	Ę
	Link	-
	DESCRIPTION 8	k INSTRUCTORS
	Preview Summary	
	Enter preview summarv	
Click on the field Link	Revenue Recognition Date *	-
	OUTSIDE PROVIDER	
	Outside Provider	Yes
	Message	Enter Registration Message Here
	Link	
	DESCRIPTION 8	LINSTRUCTORS
	Preview Summary	
	Enter preview summary Detailed Description	
Enter Link.	Revenue Recognition Date +	
	OUTSIDE PROVIDER	
	Outside Provider	Yes
	Message	Enter Registration Message Here
	Link	P.
	▲ DESCRIPTION 8	
	DESCRIPTION	
	Preview Summary Enter preview summary	

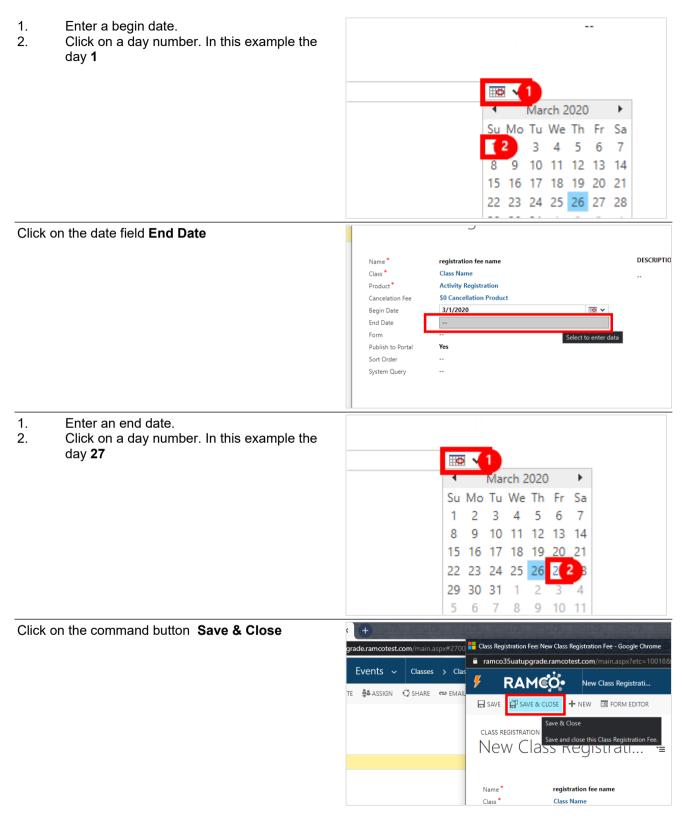


Enter Link.	Revenue Recognition Date *
	OUTSIDE PROVIDER Outside Provider Yes Message Enter Registration Message Here Link
	DESCRIPTION & INSTRUCTORS Preview Summary Enter preview summary Detailed Description
Click on the command button Save	Class: New Class × + Class: New Class × ← → C • ramco35uatupgrade.ramcotest.com/main.aspx#270033776 ✓ RAMCO Events ∨ Classes > New Class
	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 Cancelation Fee Begin Date* 5/1/2019 12:00 AM End Date* 5/30/2020



Click on the product field and add a product.	s Registrati =
	registration fee name DESCRIPTION Class Name
	 Yes
Click on the search button of field Cancelation Fee	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 Registration Name* Class* Product* Cancelation Fee Begin Date Form Publish to Portal Sort Order System Query System Query 2019 - Dues - Local MikeDuesLocal Soutocal
Click on the date field Begin Date	New Class Registrati *= Name* registration fee name DESCRIPTI Class* Class Name Product* Activity Registration Cancelation Fee S0 Cancellation Product Begin Date Form Select to enter data Form Publish to Portal Yes Sort Order System Query







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.	
	REGISTRATION FEES
To begin, select the registration fee to restrict	Name 🛧 Produc
	Reg Fee - Standard /likeC - C
Choose "More Commands" to open the menu	– 0 X
	110066&/histKey=303938345&newWindow=tru Q 🛧 🕴 📎 🧃 🏂 🔝 🗊 🎼 🗄
	P I + 7 I ? 💛
	ή ψ X
	ATES 👻 💽 RUN REPORT 👻 🚥
Choose "View Query" from the menu	- 0 ×
	110066&histKey=303938345&newWindow=tru 🔍 🛧 🏮 🔌 👖 🏠 🔝 🗊 🖗 🗄
	ר © א פי פΩ
	ATES 🔹 🗈 RUN REPORT 🔹 📩 🛧 🗸
	Wiew Query
	🕄 Form Editor
Ensure "Details" are enabled so you can edit the	Remmy - R 🗙 🏪 Class Registration Fee: Reg Fee - 🗴 🏪 Advanced Find - Microsoft Dyna 🗴 🕂
query.	mcosandbox.ramcoams.org/main.aspx?extraqs=Queryid%3d%257bdd267f85-5585-4380-8538-b4eb13t
	ND Save As
	Edit Columns
	s New Save Edit Properties Clear Download Fetch
	View Query Debug
	▼ U



Select the drop down	ADVANCED FIND Query Saved Results Show View Save View Query Contacts Look for: Contacts
Choose "Memberships (Contact)" from the list	Show View Query Delt Look for: Contacts Manual Batch Marketing Lists Meeting Activity Speakers (Contact) Meeting Registration Activities (Registered By) Meeting Registrations (Contact) Meeting Registrations (Contact) Member Demographic (Contact) Member Financials (Incurring Member) Member Financials (Incurring Member) Member Financials (Member) Member Financials (Member) Member Ship Application Online Forms (Contact) Membership Applications (Contact)
Select the drop down.	Query Saved Results New Save Save Clear Downlow Show View View Query Details Downlow Look for: Contacts
Choose "Status" from the list	Select Memberships (Contact) Office Online Status Online Status Online Status Date Opt Out Opt Out Opt Out Opt Out Opt Out Date Orientation Date Owner Previous Non-Member



Click on the button Select or change the values for this field	Edit Properties Clear Download Fetch XML Download Fetch XML Query Debug
	V Use Saved View: Mer
	uais
Move "Active" to the Selected Values area	Select Values × Select the values you want included.
	Available Values Active Inactive <
Click on the button OK	<< OK Cancel
Select the drop down	Show View Query Det Look for: Contacts
	Select Memberships (Contact) Status Equals Active



Choose "Member Type" from the list	<u>Memberships (Contact)</u>							
		~	<u>Status</u>	Ec	<u>uals</u>	Act	ive	
	Join Date Last Renew Date Last Updated Local Orientation Date Member Stubus Date Member Subclass Membership Me							
Add the REALTOR member type			View	1	Query		Debug	
	:s							~
	s <u>(Contact)</u> Equals Active							
	Type V Equals						2	
	Ente					/alue	-	
Click save to complete the process.		Memb	bership: Ramco, Remmy - R	× 📒	Class Registration Fee: Reg	g Fee - 🗆 🗙	Advanced	Find - Micro
This registration fee can now only be accessed by those contacts returned by the query.					ryid%3d%257bd	ld267f85-5		
	FILE		ADVANCED FIND		🔒 Save As	Q	[] Group AND	
	Query Saved Results New Save Edit Columns Show View View					Clear	【₩ Group OR → Details Query	Downlo Xi Det
	Loo	(for:	Contacts	Save				
		Se	lect		this query. The query v d in Saved Views.	will be		
		Me	emberships (Contact)					

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

y >						
× delete	FORM	PROCESS ¥	♥ SHARE	MORE COMMAN	IDS	



Click on the command button Class Registration			 ♣ Impersonate ⓑ Deactivation W ☆ Process Payme ☆ Membership A ☆ Store ※ Meeting Regist ♦ Class Registrat ♥ Payment ♥ Class ♥ ARDS Syr Class 	nt pplication tration MINNESOTA ASSO 0 5 Kegistration SU6000017)
			Password Rese	t
From their list of current registrations, click Cancel on the registration they wish to cancel	ion/Search.aspx?uid={3	C2CD940-7CCD-E911-	-9C34-00155D630C50}&	8id=a652e1fb-bdbe-e911-9c34-00
	Dates	Edit	Cancel	
	2		Cancel	
		Edit	Cancel	
	99	Edit	Cancel	
			3 items in 1 page	
Click on the button Submit Cancelation		Back	Submit Cancela	tion
Click Print Confirmation, if applicable.			Puginomics Wednesday - Sep Attendee: Aaron, Refund Det	otember, 30 2020 8:00 AM to 8:00 AM Beverly Cails



4.1.4. Create and Add a Document to A Class

Open the Navigation Areas	Sales & Accou ↓ Coupons → New	Member Coup
	Sales & Accounting	👶 RUN W
	ember Coupon -≡	
	New Member Coupon NMCOU Order - Percentage	DESCRIPTION A Coupon fo
Choose the Events area	Sales & Accou V Coupons > New Mer	nber Coupon
	Membership	Sales &
	Accounting Setup	Accou
	Bulk Profile Charges Products	⊑ , ⊋ G
	Bulk Refund Batches Coupons	Бр Ва
Choose the Classes entity	Workplace Membership	Events
	Classes	Meetings
	Courses Designations	Meeting
	Classes Classes	T Events
	2 Class Registrations	Registra
	Class Locations	& Meeting
Choose a Class to add a document to, then open it.	Class Instructors Orientation Test Cource 1	Neeting
	Mike's Example Class 001 Mike's Example Course	
	New Member Orientation New Member Orientation	
	Technology Class 101 (with Documen Technology Course 101	
	Code of Ethics Code of Ethics Next Level Buyer's Agent - 3 Day Next Level Buyer's Agent 2	



Scroll to the bottom of the Class, and open the "Event Documents & Notes" tab.			
		OCUMENTS & NOTES	
	Created On Created By	 4/18/2019 12:20 PM 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			
			•
			+ <u>New</u> Create a new Event Document.
	atus	Active	-
	atus Reason	Active	
			B



Give the document a name	event document : ramco New Event Document -=			
	GENERAL			
	Document Name * ort Order Type * <u>Select to enter data</u> Display Behavior * URL			
Choose when the document will be available on the	New Event Document -=			
portal	- GENERAL			
	TES Document Name* KU Parking Map Sort Type* Pre-Event Disp			
	URL Post-Event -			
	Description Description			
Enter the URL or Link for the document	New Event Document ™			
	- GENERAL			
	Document Name* KU Parking Map Sort Order			
	Type * Attendees Display Behavior *			
	<u> </u>			
	Description			
	Description B I U abs x, x' T- fT-HI- Ta Ty Ik H H # # F = = = *			
Choose how the document will display.				
	Sort Order Display Behavior *			
	u.edu/files/docs/parkingmap.pdf Select to enter data			



Click Save and Close to complete the Event Document

Workplace Classes > Next Level Division A				
-	ttps://ramcosandbox.ramcoams.org/main.aspx?etc=10034&e			
'E 🔟 DELET	FRAMCO New Event Document			
Buyer's	EVENT DOCUMENT : RAMCO			
	New Event Document -=			
	▲ GENERAL			

4.1.5. Hide Class on Portal from Non-REALTOR Members

Open the Navigation Areas.	Registration Fee: Example © + Image: Constraint of the second down and the second dow
Click on the "Classes" entity.	Workplace Membership Events
	Classes Meetings
	Courses Designations Meetin
	Classes Events
	Class Registrations Registre
	Class Locations Meetin
	Lass Instructors
Open the class record.	➡ Active Classes ▼
	✓ Name Course Current Registrations
	DM - AEI Meeting 2018 - RAMCO Pr DM - AEI Meeting 2018 - R
	test Class 3 test Course 5
	Test Class 01 Test Cource 1
	new Test Class 3 Technology Course 101
	Example Class - With Documents <u>Technology Course 101</u>
	oRIENTATION Test Cource 1
	Code of Ethics Code of Ethics
	 UDBALLINELLINE Class Code of Million



Set Invitation Only to "Yes"	* REGISTRATION SETTINGS
	Current Registrations
	Current Waitlist Registration: 📾
	Invitation Only * No Registration Begin Date 3/17/2020 4 No M
	Registration End Date 3/27/2020 8:00 AM
	Max Attendance 100 Eligible for One Click Registr No
	Allow Waitlist No Waitlist Automated Promotic
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.	an se
For this example, we will set it to REALTORS only.	
Start by choosing View Query.	FLOW E START DIALOG BWORD TEMPLATES V
Clart by choosing view Query.	A View Query
	<mark>⊵‡</mark> Othe View Query ⊡ Form Query used to define who is eligible to register fo
Make sure Details are enabled so that you may	ss: Class Example × 👫 Advanced Find - Microsoft Dynax × +
update the Advanced Find	C a ramco35uatupgrade.ramcotest.com/main.aspx?extraqs=Queryid%3d%257b37804a71-83el
	ADVANCED FIND
	aved results Results New Save As Image: Comparison of the comparison
	Contacts Details Utile the same line from view
	Hide the query lines from view.



Click the drop-down menu to view the fields and related enitities.	PLE ADVANCED FIND Query Image: Speed Results Show View Show View Cook for: Contacts
Choose the relationship called "Memberships (Contact)"	Show View Query Debug Look for: Contacts Werkeung Liss Weeting Activity Speakers (Contact) Meeting Registrations (Contact) Member Financials (Incurring Member) Member Financials (Incurring Member) Member Financials (Contact) Memberships (Contact) Medified By (Ckernal Party) Modified By (User) Name Changes (Contact)
Open the next drop-down menu	Query Save As Image: Control of the second sec
Click the magnifying glass, scroll down and choose search for more records	Sweed Results Swee As E Edit Columns E Git Columns E Git Columns E Git Columns Download Fetch Show View Sweet Results E Git Properties E Git Properties Download Fetch Or: Contacts Select Debug Download Fetch Select Edit Properties Edit Properties Edit Properties Edit Properties Select Edit Properties Edit Properties Edit Properties Edit Properties Select Edit Properties Edit Properties Edit Properties Edit Properties Select Edit Properties Edit Properties Edit Properties Edit Properties Select Edit Properties Edit Properties Edit Properties Edit Properties Select Edit Properties Edit Properties Edit Properties Edit Properties Select Edit Properties Edit Properties Edit Properties Edit Properties Select Edit Properties Edit Properties Edit Properties Edit Properties Select Edit Properties Edit Properties Edit Properties Edit Properties



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 Selected records: Select Remove
Click on the button Add	1 - 3 of 3 (1 selected) H 4 Page 1 F Select Image: Select accords: Select Image: Select accords: New Add
Open the next drop-down menu, then choose the member type Field	Query Swed Views Results New Save Edit Properties Clear E Group UR Download Fetch XML Download Fetch XML Show View Query Debug
In the lookup field, search for the member type REALTOR	



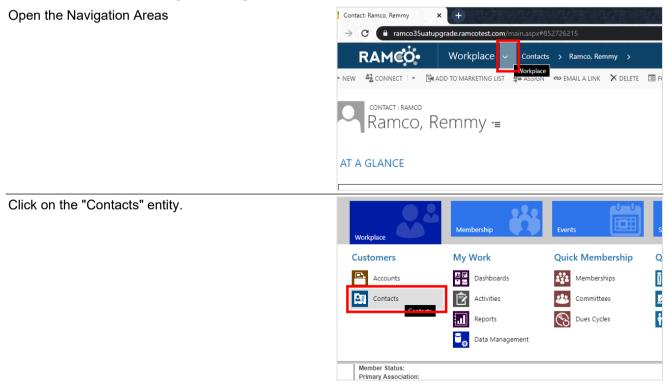
Open the drop-down and choose the "Status" field	Show	ाष्ट्र Lait Properties View	Query	Debug		
	Look for: Contacts	A1CAA	Query	Debug		
	Select					
	<u>Memberships (Cor</u>	<u>ntact)</u>				
	✓ <u>Association</u>	Equals	ST PAUL AREA ASSO			
	✓ Member Type	Equals	REALTOR	Q		
	Select					
Choose the "Status" field.	Internuersnips (con	<u>nacij</u>				
	✓ <u>Association</u>	Equals	ST PAUL AREA ASSO	<u>CIATIO</u>		
	✓ <u>Member Type</u>	Equals	REALTOR			
	Office		•			
	Online Statu Online Statu					
	Opt Out Opt Out Dat					
	Orientation Owner					
	Previous No Primary Mer	mbership				
	Real Estate (License Name or Appraiser License Number				
	Record Crea Reinstateme	ent Code				
	State Associ					
	State Dues P		XIVIL			
Click on the button Select or change the values for	View		Debug			
this field				▼ Use S		
	Founds	ST PAUL AREA ASSOCIATIO				
	Equals Equals	REALTOR				
	Equals					
Select "Active" then use the arrows to move it to the				_		
"Selected Values" area.	S	elect Values		×		
	Sel	ect the values you want included.				
		railable Values	Selected Values	^		
		nactive	_			
		L	>>			
			<<			
			<<	•		
			<<	▼ Cancel		



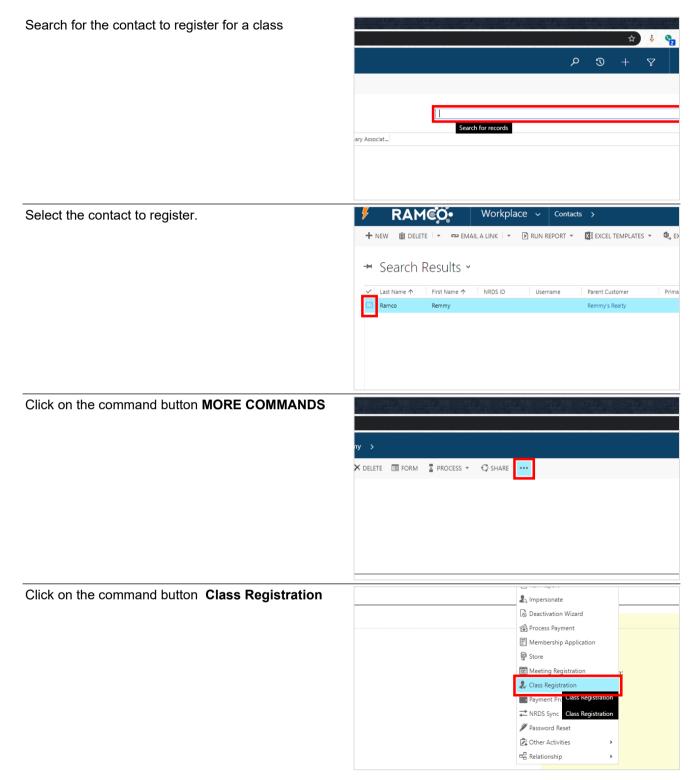
Available Values Selected Values Click on the button OK Inactive Active Cancel Click on the ribbon item Save Class: Class Example Advanced Find - Microsoft Dyna × × → C 🔒 ramco35uatupg 4 ADVANCED FIND E Group AND Save As . i, 🖌 Edit Columns E Group OR Results Clear Saved Views Save load Fetch Edit Properties 🔂 Details Show Save Look for: Contacts Save this query. The query saved in Saved Views. Select Memberships (Control Association ST PAUL AREA ASSOCIATIO.. Equals ✓ Member Type <u>Equals</u> REALTOR

RAMCO Portal

4.1.6. Registering for a Class









Select a course from the course drop down field.	\leftrightarrow \rightarrow C $$ ramco35uatupgradeisv.	ramcotest.com	/CobaltIsv//Education/Registration/Search
	The contact is not registered for any upcom	ning classes.	
	Course [optional]		End Date [opt
	All Courses		•
	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 Catagony		
Select the class you wish to register for.	That Category That Other Tag That Up and Coming:	Tag	
Select the class you wish to register for.	That Other Tag That Up and Coming	Tag	
Select the class you wish to register for.	That Other Tag That Up and Coming Search Again		
Select the class you wish to register for.	That Other Tag That Up and Coming Search Again Course	Tag	Date
Select the class you wish to register for.	That Other Tag That Up and Coming Search Again		Date 11/30/19 (8:00AM) to 11/06/99 (8:00AM)
Select the class you wish to register for.	That Other Tag That Up and Coming Search Again Course		
Select the class you wish to register for.	That Other Tag That Up and Coming Search Again Course		
Select the class you wish to register for.	That Other Tag That Up and Coming Search Again Course A Class That's Always Available	Location	11/30/19 (8:00AM) to 11/06/99 (8:00AM)
	That Other Tag That Up and Coming Search Again Course	Location	11/30/19 (8:00AM) to 11/06/99 (8:00AM)
Click on the button "Register Now" to begin the	That Other Tag That Up and Coming Search Again Course A Class That's Always Available	Location	11/30/19 (8:00AM) to 11/06/99 (8:00AM)
Click on the button "Register Now" to begin the registration process. There may be unique questions	That Other Tag That Up and Coming Search Again Course A Class That's Always Available	Location	11/30/19 (8:00AM) to 11/06/99 (8:00AM)
Click on the button "Register Now" to begin the	That Other Tag That Up and Coming Search Again Course A Class That's Always Available https://ramco35uatupgradelsw.ramcotest.com/Cobalt	Location tlsv//Education/Re self to arrive	11/30/19 (8:00AM) to 11/06/99 (8:00AM) gistration/Details.aspx?cid=568977ce-e500-ea
Click on the button "Register Now" to begin the registration process. There may be unique questions	That Other Tag That Up and Coming Search Again Course A Class That's Always Available https://ramco35uatupgradelsv.ramcotest.com/Cobalt	Location tlsv//Education/Re self to arrive	11/30/19 (8:00AM) to 11/06/99 (8:00AM) gistration/Details.aspx?cid=568977ce-e500-ea
Click on the button "Register Now" to begin the registration process. There may be unique questions	That Other Tag That Up and Coming Search Again Course A Class That's Always Available https://ramco35uatupgradeisy.ramcotest.com/Cobalt You/ve always been here, waiting for yours Date & Time Saturday - November 30, 2019 8:00AM to 5 8:00AM	Location tlsv//Education/Re self to arrive	11/30/19 (8:00AM) to 11/06/99 (8:00AM) gistration/Details.aspx?cid=568977ce-e500-ea
Click on the button "Register Now" to begin the registration process. There may be unique questions	That Other Tag That Up and Coming Search Again Course A Class That's Always Available https://ramco35uatupgradeisv.ramcotest.com/Cobalt You've always been here, waiting for yours Date & Time Saturday - November 30, 2019 8:00AM to 5	Location tlsv//Education/Re self to arrive	11/30/19 (8:00AM) to 11/06/99 (8:00AM) gistration/Details.aspx?cid=568977ce-e500-ea
Click on the button "Register Now" to begin the registration process. There may be unique questions	That Other Tag That Up and Coming Search Again Course A Class That's Always Available https://ramco35uatupgradeisy.ramcotest.com/Cobalt You/ve always been here, waiting for yours Date & Time Saturday - November 30, 2019 8:00AM to 5 8:00AM	Location tlsv//Education/Re self to arrive	11/30/19 (8:00AM) to 11/06/99 (8:00AM) gistration/Details.aspx?cid=568977ce-e500-ea
Click on the button "Register Now" to begin the registration process. There may be unique questions	That Other Tag That Up and Coming Search Again Course A Class That's Always Available https://ramco35uatupgradeisy.ramcotest.com/Cobalt You/ve always been here, waiting for yours Date & Time Saturday - November 30, 2019 8:00AM to 5 8:00AM	Location tlsv//Education/Re self to arrive	11/30/19 (8:00AM) to 11/06/99 (8:00AM) gistration/Details.aspx?cid=568977ce-e500-ea



Click on the button Continue

What Is Your Nickname? [optional]	Nickname 🛛
Remmy	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	
Close Wizaru Pay by Casir	Pay by Check	Credit Caru	

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
Oliale Continue to program to the neuropath comment	
Click Continue to progress to the payment summary page.	Payment Amount 100.00
	Amount Received
	100
	Back Cancel Continue



Select the "Print Receipt" button to download a receipt							
if desired.		Payment Number	Date	Method	Ca	rd/Chec	k Numb
			06/17/2020	Cash			
			_				
		Close Print Receipt					
		\mathcal{P} Type here to search		<u>≓</u> i <mark>,</mark>		9	
Select close to exit the process payment wizard.		6/17/2020 Cash					
			_				
		Print Receipt Close					
	0.000						

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 + E 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	TIVEXT LEVEL DUYELS AGENT - 5
	Class Registration Associated View -
	+ ADD NEW CLASS REGISTR 🔀 BULK DELETE
	✓ Contact ↑ Class Registration P Wait
	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



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
	Cass Registration Associated View ~
	+ ADD NEW CLASS REGISTR ✓ EDIT ✓ ACTIVATE ☑ Contact ↑ Class Registration P Waiti
	✓ Jemis, Cory 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 Edit n P Waiti Edit this Class Registration. Edit this Class Registration.
	 ✓ Bemis, Cory Next Level Buyer's Agent - 3 Day No No ✓ Bemis, Greg Next Level Buyer's Agent - 3 Day No No
	Z Diehl Mieksel - NeutlauelDuner's Asent - 2 Day - No
Set "Attended" to "Yes"	Level Buyer's Hide On Portal No Yes 0 - 0 of 0 (0 s) Level Buyer's Registered By Notes functional Notes functional
	Authorized By Class Revenue
	Level Buyer's. ATTENDANCE & RESULTS
	Level Buyer's Registration Paid Yes No Level Buyer's Attended * O No Yes
	Level Buyer's No Showed O No O Yes
	Level Buyer's Grade
	Level Buyer's WAITLIST
Click the "Change" then wait for RAMCO to update the records.	Level Buyer's Waitlisted O No O Yes
	Change Cancel
	Status Active
	Status Reason 🛛 🔒 Active

Please open the desired Class record, then restart this Assist.



4.2. Meetings

Add a Meeting 4.2.1.

Open the Navigation Areas	Event: Staff Development Day × +
	← → C
	FRANCO Events Events Staff Development D + NEW © DEACTIVATE Im DELETE Staff Operation Contract
	^{EVENT : RAMCO} Staff Development Day ·=
	GENERAL Name* Staff Development Day
Choose the Events Area	Development Day × +
	ramco35uatupgrade.ramcotest.com/main.aspx#378688075
	Events > Staff Development D >
	Membership Events Sales & Accounting
	Meetings
	es Designations Heetings
	25 Events
Choose the Meetings entity	Events > Staff Development D >
Choose the Meetings entity	Events Events Staff Development D > Membership Membership Staff Development D >
Choose the Meetings entity	Membership Sales & Accounting
Choose the Meetings entity	es Designations
Choose the Meetings entity	es Sales & Accounting Membership Events Designations Sales & Accounting Meetings Meetings Events Events Meetings Events Meetings Events
Choose the Meetings entity	es Designations
Choose the Meetings entity	es Designations Registrations Membership Membership Designations Meetings Me
Choose the Meetings entity	Membership Events Events Events Events Meetings Registrations Locations Events Registrations Locations Instructore Meetings Active Meetings - Micrix Meetings Active Meetings - Micrix
	Membership Events Sales & Accounting es
	Membership Events Sales & Accounting es es <tr< th=""></tr<>
	Membership Events Sales & Accounting es
	Membership Events Sales & Accounting es Pesignations ** Period ** Period P
	Membership Events Sales & Accounting Events Meetings es Figure Designations Registrations Events Registrations Locations Locations Meeting Registrations Locations Meeting Registrations Locations Meetings Active Meetings - Micri X Meetings Cubic biblicer Meetings Active Meetings - Micri X Meetings Cubic biblicer Meetings Active Meetings - Micri X Meetings Cubic biblicer Meetings Active Meetings - Micri X Meetings Active Meetings - Micri X Meetings Cubic biblicer Meetings Active Meetings - Micri X



Give your meeting a name.	🖽 ZAALE 🥂 ZAALE 🛪 CETOZE 📥 INEMI ETTI KONI ZORI KENOKLI ETI LOKWI EDILIOK
	New Meeting =
	A MEETING SETUP
	Name* Begin Date* Full Day No Organizer Order Source No No No No No No No No No N
Click on the date field Begin Date	ew Year's Meeting =
	EETING SETUP
	New Year's Meeting n Date* 1/1/2022 12:00 AM Date* 1/2/2022 2:30 AM Sat Jan 01 2022 00:00:00 (GMT-06:00) Centre Day No anizer
	>ciation* ST CLOUD AREA ASSOCIATION OF REALTORS er Source
Choose and begin date and time	Year's Meeting =
	ING SETUP
	New Year's Meeting Mi 1/1/2022 III → I 1/2/2022 2:30 AM No No
	n* ST CLOUD AREA ASSOCIATION OF REALTORS
Click on the date field End Date	eree Ew Years IVIeeting =
	EETING SETUP
	ne* New Year's Meeting n Date* 1/1/2022 IBB ✓ 12:00 AM ✓ Date* 1/2/2022 2:30 AM Day No
	anizer ciation * ST CLOUD AREA ASSOCIATION OF REALTORS er Source ish to Portal Yes



Choose an end date and time	rearsi	weeung =	
	ING SETUP		
		New Year's Meeting	M
	e "	1/1/2022 12:00 AM 1/2/2022 E:30 AM	Se
		No 	Nc
	n* rce	ST CLOUD AREA ASSOCIATION OF REALTORS	•
	Portal	Yes	
Click on the toggle field Publish to Portal			
	Name * Begin Date *	YPN Mixer 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		
	Discutions		

- Enter the address for this location. This will ٠ enable the Bing maps location on the portal. Enter City
- •
- Enter the State ٠
- Enter the Zip Code ٠
- Click on the country lookup ٠
- Choose United States as the country •
- Enter directions to the venue if applicable. •

Kansas 12345



Click on the date field Begin Date	orded			
	EGISTRATION SETTINGS			
	ISTRATION DATES			
	n Date 1/1/2021 8:00 AM			
	Date 1/1/2022 8:00 AM			
	ISTRATION RULES			
Choose a date to allow people to start registering				
	TRATION SETTINGS			
	TION DATES M(
	1/1/2021 8:00 AM 🗸			
	1/1/2022 8:00 AM Fri Jan 01 2021 08:00:00 (GMT-06:00) Central Time (
	TION RULES			
Click on the date field End Date	Come Click Registr. No.			
	REGISTRATION SETTINGS			
	REGISTRATION DATES Begin Date 3/1/2020 IBI V 8:00 AM			
	End Date			
	REGISTRATION RULES Eligible for One Click Registr No			
	Allow Group Reg No Invitation Only No			
Choose a registration cutoff date.				
	TRATION SETTINGS			
	TION DATES M			
	3/1/2020 8:00 AM			
	Select to enter data			
	TION RULES			
	One Click Registr No µp Reg No			
	Dnly No			



Set the max number of attendees for this event.	REGISTRATION RULES		
	Eligible for One Click Registr Allow Group Reg	No	
This does not include their guests	Invitation Only	No	
	MAXIMUM CAPACITY		
	Max Registrations		
	Max Companions	Select to en	ter data
	EDIT/CANCEL REGISTRATIC	DN	
	Edit Deadline Default Cancelation Fee		
Set the max number of companions/guests	Eligible for One Click Registr Allow Group Reg	No	
	Invitation Only	No	
	MAXIMUM CAPACITY		
	Max Registrations	100	
	Max Companions		
		Select to enter data	
	EDIT/CANCEL REGISTRATIC	DN	
	Edit Deadline Default Cancelation Fee		
	Cancelation Refund Deadline		
Select a cutoff deadline for people to make changes to their registration			
			Meeting Cancelation Fees Sub-G v Name ↑
Add a cancellation fee if applicable.			
This will be deducted from any automatic refunds when people cancel their registration			
		<u>م</u>	Meeting Cancelation Fees Sub-G 💙
		_	Name 🛧
			To enable this content, create the record.



Select a cutoff for automatic refunds when people cancel.	Max Registrations 100 Max Companions 25
	EDIT/CANCEL REGISTRATION
	Edit Deadline 4/10/2020
	Default Cancelation Fee \$0 Cancellation Product
	Cancelation Refund Deadline
	FINANCIAL
	Revenue Recognition Date +
	Created On A Mo
Set a preview summary for this meeting.	New Meeting -=
	- DESCRIPTION
	Designer Company
	B I ឬ abe x, x' T+TFHI+T ₂ Ty 工 注 注 注 譯 譯 三 三 二 9 (*) 三 三 %
Enter a detailed meeting description if applicable.	· · · · · · · · · · · · · · · · · · ·
Enter a detailed meeting description in applicable.	
	Preview Summary
	-
	Detailed Description B I U abe x, x' T• rT• H1• T₂ T₂ II
	This is a detailed meeting description
Click save to complete the process.	Meeting: New Meeting × +
-	← → C (a ramco35uatupgrade.ramcotest.com/main.aspx#986300885
This creates your meeting, but people will not be able to sign up for this meeting without a registration fee.	F RAMEO Events Meetings New Meeting
If you want help creating a registration fee, try using	SAVE CLOSE + NEW III RUN SUB REPORT II FORM EDITOR
the assist called "Create a meeting registration fee"	Mee Save this Meeting. New Meeting r≡
	CLASSES
	Name ↑ Course Class Begin Date ↑
	To enable this content, create the record.



4.2.2. Modify a Preexisting Meeting Registration

Click on the command button MORE COMMANDS

	>					
	FORM	PRO	OCESS 🔻	🗘 SHARE		
					MORE COMMANDS	
Choose the Meeting Registration wizard			Current NRDS Data Membership: Member Type: Member Status: Primary Association: Primary State Associa		Construction Wizard Process Payment EMembership Application	
			Last Cha Office:	anged By:	Meeting Registration Class Regis Meeting Registration	
					Payment Pi Allows you to register t Allows yo	this contact for a
Choose "Edit" next to the meeting registration						
	Date					
	21				Edit	
	21				Edit	
			2	items in 1 pa	ige	
To update guest information, choose a guest tab.						
	g					
		F	Reggie 20	19 Annual	Guest: Guest 1 Guest 2	Guest: G
		F	Fee: My N	leeting - Fee	- \$0.00	
			There a	re no activities	for this registration	

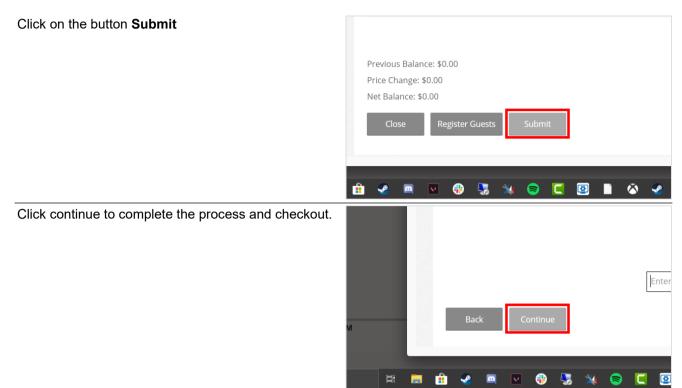


Then choose Update Name	Reggie 2019 Annual Guest: Guest 1 Guest 2 Guest: Gu
	Fee: Guest - \$30.00
	There are no activities for this registration
	Cancel Registration Update Name
	Previous Balance: \$0.00
Make the necessary changes to the guest name	My Meeting
	First Name Bad
	Guest 1 X
	Last Name Com
	Guest 2
Click continue to proceed. Repeat this for each guest that needs updating.	Guest 1
	Last Name C
	Guest 2
	Back Continue
If you wish to cancel this meeting registration, choose "Cancel Registration"	Reggie 2019 Annual Guest: Guest 1 (
5	Fee: Guest - \$30.00
	There are no activities for this registration
	Cancel Registration Update Name
	Previous Balance: \$0.00



If you wish to add more guests, choose "Register Guests"		Previous Balar Price Change: (Net Balance: (Close	(\$30.00)	Submit
Choose a guest fee to register the guest	My Mee	ting		
	> Guests		Registration Fee Deuest (\$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.		Reggie	c	Dauge Man
		Last Name	e	Company
		LKopez		
		Cancel	Continue	



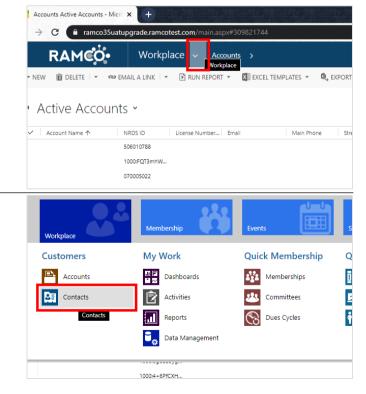


Please restart this assist from a contact record.

4.2.3. Registering for a Meeting

Open the Navigation Areas

Click on the "Contacts" entity.





Use the search box to search for your contact.	
	x × €
	ר \$ \$ + ץ
	Remmy
	Home Address: City Created On Modified On
	Chicago 1/25/2020 2:18 1/25/2020 4:06
Select the contact to register for a meeting	FAMCO Workplace Contacts >
Select the contact to register for a meeting.	
	↔ Search Results ×
	Last Name ↑ First Name ↑ NRDS ID Username Parent Customer Prima
	Ramco Remmy Remmy's Realty
Click on the command button MORE COMMANDS	
	ny >
	X delete 💷 Form 📱 process 👻 🗘 share 🚥 More commands
	MURE COMMANDS
Click on the command button Meeting Registration	► Run Report
	a Impersonate
	🔓 Deactivation Wizard
	Membership Application
	Gene Store
	Paymen Allows you to register this contact for a meeting
	🛱 Other Activities 🔹 🕨



Select a meeting to register for.		_	00000	Av	ailable	e Meetings	
						Name	
				С	Mike	eC - Example Meeti	ng 02
				С	My	Vleeting	
					Cancel	Select Meetin	g
Click the "Select Meeting" button to view meeting					Nan	ne	
details.		(С	MikeC - Ex	kample N	leeting 02	09/30/2020
		(•	My Meetir	ng		01/01/202 ⁻
			Ca	Incel	Select Me	eeting	
Click on the button Register Now!		Annie's Meeti	ng Ac	ctivity	Activity	03/03/2020 8:00 AM	03/03/
		Annie's Meeti	ng Se	ession	Session	03/04/2020 8:00 AM	03/04/
		Annie's Class			Class	03/04/2020 2:00 PM	
		Class for New		nbers	Class	03/05/2020 8:00 AM	
		Racing Test Cl	ass		Class	06/10/2020 8:00 AM	06/30/:
	□ • e •	Back			Register No	wi	
If your meeting allows for group registration. You must				-			
select a registration type.	мсо						
	Annua	I, Reg][
	d your required O left;">AutoPay En		лс			egistering myself d like to register	
	ght: bold;">Your D	oues Are Past D	ue.			ot want to register	
					Cancel	_	

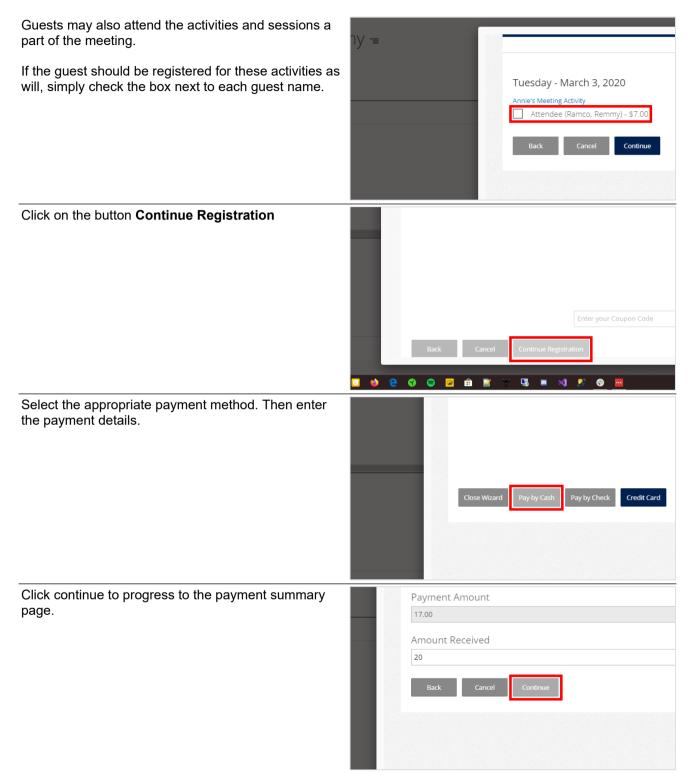


DE Training! I am registering myself only. Diled (NO CC ON res Are Past Due I would like to register myself and others. I do not want to register for the event, but I would Cancel Continue
MCO Annual, Reg Ind your required COE Training! Ref;"> AutoPay Enrolled (NO CC ON pht: bold;"> Your Dues Are Past Due Back Cancel Contir
-
of Guests
-
2 ★



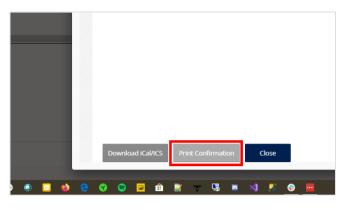
Click on the button Continue			
	Guest Registrations - \$30.00	2	
	Back Cancel Contin	nue	
 Enter a First Name Enter a Last Name 	First Name Badge	e Name	
3. Enter a Badge Name	Last Name Comp	Company Name [optional]	
Click on the button Continue	Maltage		
	Last Name	Company Na	
	Back Cancel Contin	nue	
Select a meeting registration fee.			
		ediate Past President Registra 's Meeting Reg Fee - \$0.00 's Table Registration - \$150.00 rel Continue	
Click on the button Continue	Immediate Past Pre Mike's Meeting Reg Mike's Table Regist Cancel Contin	ration - \$150.00	







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	Contact: Aaron, Beverly × +						
	→ C a ramco35uatupgrade.ramcotest.com/main.aspx#27205570						
	RAMCO Workplace - Contacts > Aaron, Beverty >						
	• NEW 📲 CONNECT 🖙 📑 ADD TO MARKETING LIST 😴 ASSIGN 😄 EMAIL A LINK 🗙 DELE						
	Aaron, Beverly -						
	AT A GLANCE						
Click on the navigation area Events	ron, Beverly × + ranco35uatupgrade.ramcotest.com/main.aspx#27205570						
	Workplace V Contacts > Aaron, Beverly >						
	Membership Kevents Events Sales & Ac	ccounting					
	rs My Work Quick Membership Quick Ev	vents					
	ints 📲 Dashboards Memberships 👖 Cou	rses					
	cts 📝 Activities 🔐 Committees 🖂 Clas	ses					
Click on the "Events" entity.	Membership & Events Sales & Ac	ccounting					
	Meetings						
	es 🗊 Designations 🙌 Meetings						
	es Events						
	Registrations Reg						
	Locations Meeting Registrations						
	Instructors Meeting Exhibitors						
	a Desuidare						



Click on the command button New	Events Active Events - Microsoft X +							
	← → C							
	FRAMEO Events >							
	🕂 NEW 🛅 DELETE 🗇 🖘 EMAIL A LINK 🖙 🕑 RUN REPORT 👻 🖾 EXCEL TEMPLATES 🗸 🤹 EX							
	New							
	→ A Create a new Event record.							
	Name 🔨 Begin Date Locatio							
Click on the field Name								
	EVENT : RAMCO							
	New Event ·=							
	GENERAL Name "							
	Begin Date*							
	End Date * Kansas Full Day							
	Location REGINALD Publish to Portal JO-JOHNSON							
Enter the name of the event.								
	EVENT : RAMCO							
	New Event ≔							
	GENERAL							
	Name " S Begin Date "							
	End Date * Reginald Full Day Kansas							
	Location REGINALD							
	Publish to Portal JO-JOHNSON							
1. Enter a begin date and time.	Manana addresses							
 Enter a begin date and time. Enter an end date and time. 	Staff Development Day							
3. Enter a location	4/1/2020 8:00 AM 1 4/1/2020 4:00 PM 2							

4. Click on the toggle field **Publish to Portal**

Staff Development Day	
4/1/2020 8:00 AM	0
4/1/2020 4:00 PM	2
No	
	٤ ک
No	4
No	



Enter a preview summary.			
		_	•
		L	PREVIEW SUMMARY
			DETAILED DESCRIPTION B I U abe ×, × ² T+ TT+ HI+ T ₂ T ₂ I
Enter a description.			
			PREVIEW SUMMARY
			O DETAILED DESCRIPTION
			B I U abs X, X ³ T. T. HI T T I
Click the save icon to complete.			
	atus Activ	Ge Ge	ctivate Windows to Settings to activate Windows.
	atus Reason 🔒 Activ	/e	8
			へ le 🎚 🗗 🕼 2:48 PM Save



5. Committees and Elections

5.1. Committees

5.1.1. Create a Committee

Accounts Active Accounts - Micro 🗙 Open the navigation areas → C amco35uatupgrade.ramcotest.co Workplace RAMCO. Accounts > orkplace Merge 🛛 Send Direct Email NEW 🖋 EDIT 🗸 ACTIVATE 🔓 DEACTIVATE 🗴 DELETE Active Accounts ~ Account Name 个 NRDS ID License Number... Email Main Phone Stre 1000:vBXVcXUtF... 1000:N6Fz1Txl8... 1000;JTUpO9kM.. Click on the navigation area Membership Accounts Active Accounts - Micro 🗙 ← → C (a ramco35uatupgrade.ramcotest.com/main.aspx#971498249 RAMCO. Workplace ~ Accounts > Membe Workplace Customers My Work **Quick Membership** Q 1 e. Dashboards Memberships Accounts E Activities Contacts 223 Committees • NETTING Click on the "Committees" entity. Member Types 272 Memberships PACs Committee Types Applications Contributions \$ 4 田 Office Memberships Committee Positions Bulk Contribution Associations Dues Cycles Political Candidates 22 Committees Y Funds Bulk Renewal Imports 94MAT1000Office 506091973 94MAT1000Office 333-333-3333 94MAT13Office 94MAT13Office 333-333-3333 506091921 94MAT15Office 506091928 94MAT15Office 333-333-3333 Click on the field name 🖬 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🛛 VIEW QUERY 💷 FORM EDITOR COMMITTEE : RAMCO New Committee -= Name * Committee Type Select to enter data Reginald Lopez Committee Level Staff Contact Publish to Portal REGINALD ANTHONY LOPEZ JO-JOHNSON Association Volunteer Mode



Enter the Committee's Name.	B SAVE B CLOSE + NEW VIEW QUERY ■ FORM EDITOR COMMITTEE : RAMCO New Committee ~=		
	Name * Committee Type Committee Level Staff Contact Publish to Portal Association Volunteer Mode *	C Reginald Lopez Kansas REGINALD ANTHONY LOPEZ JO-JOHNSON	
Lookup and select the appropriate committee type. Committee types are used to categorize committees. For example, a standing committee versus a task force.	wmittee : ramco ew Comm	ittee ≔	
	mmittee Type mmittee Level ff Contact blish to Portal sociation lunteer Mode	Committee Name Standing Committee Look Up Standing Committee 1 result	P + New
Click on the search button of field Staff Contact			
	tee	٩	Committee Memberships Sub-Grid (Comm Search for records Search for records Name ↑ To enable this content, create the record.
Lookup the user record for the committees staff liaison.	blish to Portal sociation lunteer Mode * :tem Query mination Form	Cutilip, Mike Dohm, Thomas Fox, Thom Jackson, Phelicia	
	scription $I \underline{U} abs \mathbf{x}, \mathbf{x}' \overline{\mathbf{T}}$ $\mathbf{z} \underline{\mathbf{m}} \mathbf{eb} \phi \phi \mathbf{x} \mathbf{c} \mathbf{x} \mathbf{e} \mathbf{x}$	Last name, First name Lopez, Reggie MicComrick, Dong	+ New



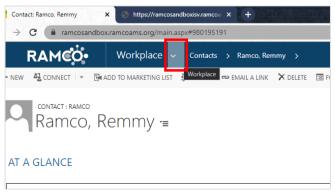
Select "Yes" on the field "Publish to Portal" if you wish to make this committee and it's members visible to those on the portal.	New Com	mittee =
	Name * Committee Type Committee Level Staff Contact Publish to Portal Association Volunteer Mode * System Query Nomination Form	Committee Name Standing Committee Lopez, Reggie No
Click on the lookup Association		
	Name * Committee Type Committee Level Staff Contact Publish to Portal Association Volunteer Mode * System Query Nomination Form	Committee Name Standing Committee Lopez, Reggie Yes
	Description	ᅚᇭᇄᅚᅚᅚᇨᅸᇃᇎᇐᇘᆿᄼᅆ
Search for the association record this committee belongs to.	Name * Committee Type Committee Level	Committee Name Standing Committee
	Staff Contact Publish to Portal Association	Lopez, Reggie Yes n
	Volunteer Mode * System Query Nomination Form	₽
	Description B 7 II also x. x ²	T. f. HI. T. T. T. T. ≒ ≒ ± ± ± ± ± ± M
Use the field "Volunteer Mode" to control whether the committee is closed or open for nomination.	me * mmittee Type mmittee Level ff Contact blish to Portal sociation lunteer Mode * item Query mination Form	Committee Name Standing Committee Lopez, Reggie Yes NATIONAL ASSOCIATION OF REALTORS® Open for Nomination Open for Joining Closed Closed
	} <u>I</u> <u>U</u> abe x, x' T- ≡ ■ ∞ ≪ ⊻ ⊨ @	- T- H- T <u>a</u> Ty II



Enter a committee description.		
,	me*	Committee Name
	mmittee Type	Standing Committee
	mmittee Level	
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5.1.2. Create Meeting from Committee Wizard

Open Navigation Areas





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	cts	Activities	Committees	Classes
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		- 2		
		1000:hKLvNuHic		
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		sed Committee nmittee Scale Test		Last name, First name Yes Cutlip, Mike No
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Select the "Create Meeting" wizard option.		~ ≙ ¢
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 Add meeting name Add meeting location 		
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	My Meeting	• ē
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	Street Address 2 [optional]	Zip Code [optional]
	City [optional]	Country [optional]
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Enter directions to the meeting location, if desired. Street Address 2 [optional] City [optional] Oz United States Directions [optional]
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2. Select start time field.
3. Click on the end time field.
and (h & dataset and the statest and the state
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A meeting just to meet
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5.1.3. Add Contact to a Committee

Open the "View Related" tab on the contact's record.) and set any set and set are and set and set any set and s
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Click on the "Committee Memberships" entity.	
	Member Education 🔂 Payments
	Member Financials 🛛 🔂 Payment Profiles
	Member Demographic Scheduled Payments
	Committee Members Committee Memberships Bulk Renewal Payments Committee Memberships
	Member Type: Member Status: Primary Association: Primary State Association: Office: Designated REALTOR®:



Click on the Waffle to Expand the view of Committee Memberships	
	+ 🔳
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Active 9/11/. 25 Member Active 9/11/. 26 Vice-Chair 27 Vice-Chair	
Look Up More Records	2019 10:55 AM 2019 10:55 AM 2019 10:55 AM + 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	12 v
Set the Term End Date.	
RAMCO will automatically expire this committee membership on the date listed here.	2
Click Save & Close to complete the process.	archin - Google Chrom
	n.aspx?etc=1012080 mmittee Me FORM EDITOR Membership. Me *=

Please restart this assist from a contact record.



5.1.4. Approve Committee Nomination

Select the Committee Nomination record to be approved. : # E E E E E • (* Committee Nominations Sub-Grid (Commit... ~ ρ Search for records Status Reason... Name ↑ Ramco, Remmy - Committee Nam ding Modified On A 3/26/2020 1:36 PM Click on the command button Run Workflow ommittee Nomination: Ramco, 🗙 C a ramco35uatupgrade.ramcotest.com/ RAMCO. Workplace 🗸 Committees > Ramco, Remmy - Co... EW 🕼 DEACTIVATE 🍈 DELETE 📼 EMAIL A LINK 🛛 🔅 RUN WORKFLOW 🗈 START DIALOG 📓 WORD TEI rkfle IMITTEE NOMINATION : RAMCO amco, Remmy - Committee View the status of w minee * Ramco, Remmy nmittee * Committee Name nination Form Response Enter your search criteria. Select the "Approve Nomination" workflow • Process Look for ¥ Look in On Demand Workflows ρ Search ocess Name Category Click on the button Add 4 ► 1 - 1 of 1 (1 selected) I4 4 Page 1 ▶ Add Remove Value <u>C</u>ancel



Click on the button **OK**

Confirm Applic				
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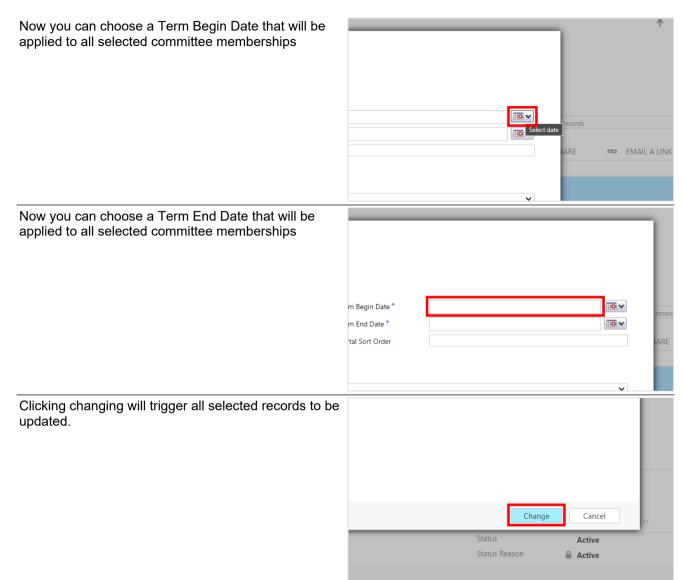
5.1.5. Update Committee Terms in Bulk

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	Global Business Alliance Committee	Standing Last na
		Standing User 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.	BOGIA OF DIRECTORS .=	
if you only wish to edit some committee memberships, check those records one by one.	Committee Membership As + add new committee m	
	✓ 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.	Board of Directors -=	
	Committee Membership As ADD NEW COMMITTEE M Committee Commit	ACTIVATE ACTIVATE ACTIVATE Positi SCULID-TSJOCI. MIKE Cutlip-Stage06, Mike McCormick-Sandbo Membe





5.2. Elections

5.2.1. Create an Election

Open the Navigation Areas

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If this election will not allow nominations, leave this field blank.		
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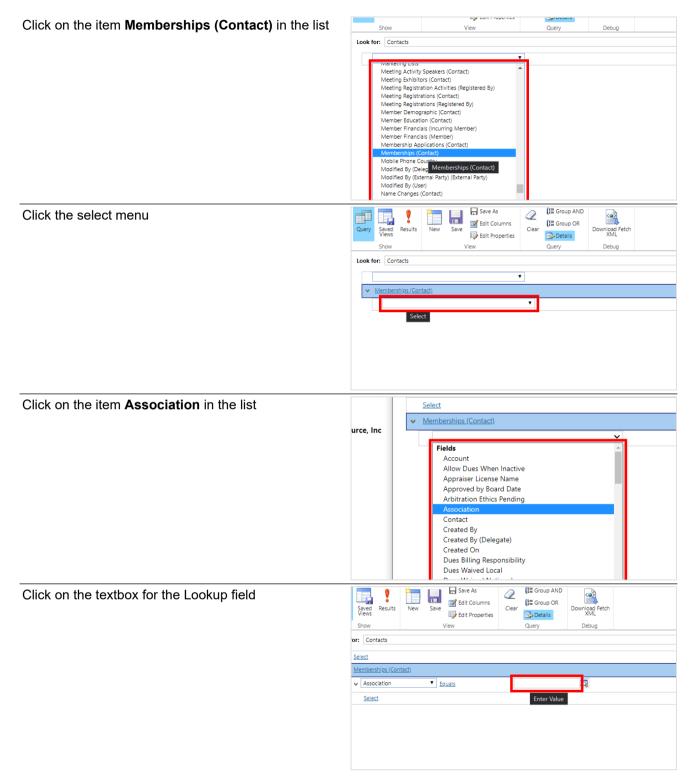
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Click Save.	Election: New Election × +
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The election is now ready for people to participate.	FRAME Elections Elections New Election
Whether you have nominations or not, candidates will need to be added so people can vote. This does not happen automatically.	ELECTION : COBALT MEMBERSHIP DYNAMICS New Election :=
For help with adding candidates, use the assist "Add a Candidate to an Election"	Write In Nomination* No Self Nominations AI* No Max Number of Nomi 1 Nomination Form



5.2.2. Restrict Nominators to REALTOR Members Only

From an election record. Click the More Commands button FLOW DISTART DIALOG WORD TEMPLATES -MORE COMMANDS FLECTION REQUIREMENT TYPES Name 个 Click on the command button View Nominator Query FLOW 🗈 START DIALOG 📓 WORD TEMPLATES 👻 •••• Run Report . R View Nominee Que R View Nominator Quer E Form Edito ELECTION REQUIREMENT TYPES Name 个 No Election Requirement Type records four Make sure details are enabled. ss Registration Fee: registratio 🗙 📑 Advanced Find - Microsoft Dynar × C a ramco35uatupgrade.ramcotest.com/main.a ADVANCED FIND Save As [E Group AND ! Q -📝 Edit Columns [E Group OR Results Clea aved 'iews load Edit Properties 📑 Details how View Details Contacts Hide the query lines from view Click the select menu ADVANCED FIND Save As E Group AND . \mathcal{Q} -📝 Edit Columns [E Group OR Results Clear Saved Views load Fetch Save Do 😡 Edit Properties 📴 Details Show View Debug Query Look for: Contacts ۲ Select

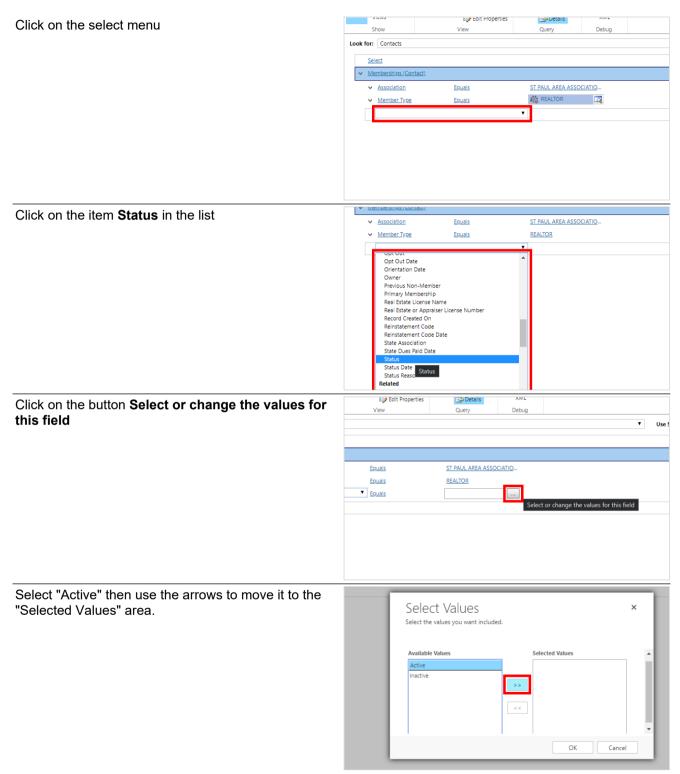






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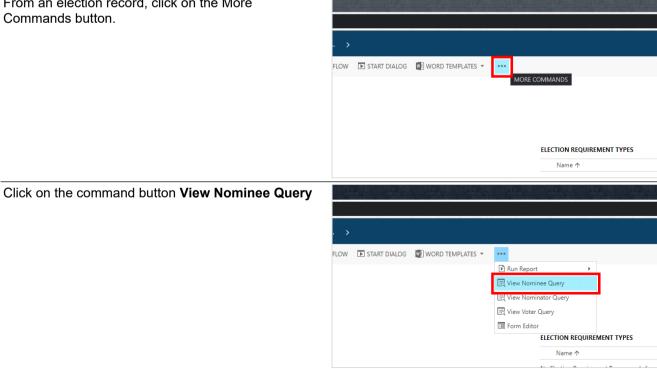


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Please restart this assist from an election record.

Restrict Nominees to Committee Members Only 5.2.3.

From an election record, click on the More Commands button.





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Click save.

Nominees will now be restricted to members of a committee

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5.2.4. Restrict Registration Fee to REALTOR Members Only

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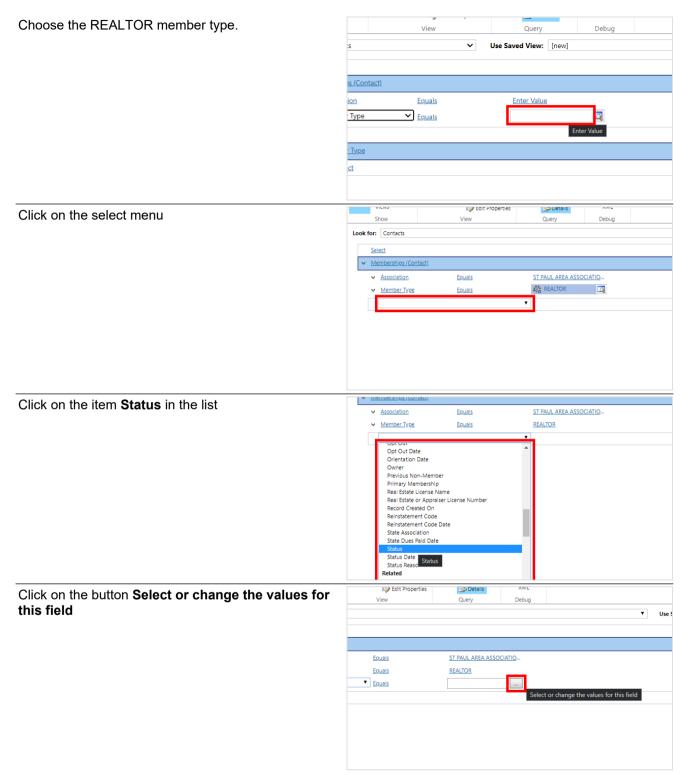


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6. Advocacy

6.1. PAC Set Up

6.1.1. Create a PAC Cycle

Open the Navigation Areas Membership PACs DELETE 🖘 EMAIL A LINK 👻 💽 RUN -PACs 🗸 Product Hard Fund Soft Fund RPAC Contribution Hard Dollar Fund Soft Dollar Fund Choose the PACs Entity Events Sales 8 Membership Fundraising Setup Data S N SC Member Types PACs Committee Types Contributions nips 2 Committee Positions Bulk Contribution D \$ Associations Political Candidate Double click the row of a PAC to add a PAC Cycle for + NEW DELETE -🖘 EMAIL A LINK it. Active PACs • -14 Name 🛧 Hard Fund Product RPAC Contribution Hard Dollar Fund RPAC AIES Click the plus icon to add a new PAC Cycle ecognition Y... | Start Date 🗸 End Date PAC Created On 1/1/2022 1/1/2023 RPAC 12/22/2020 1/1/2021 1/1/2022 RPAC 12/22/2020 1



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	▲ End Date PAC Created On
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Set "Publish to Portal" to yes to allow members to make contributions at their convenience	New PAC Cycle =
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	PAC * RPAC End D Publish to Portal
	Select to enter data
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Click on the picklist Publish to Portal value Yes	INEW PAC Cycle ™
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Set the maximum contribution for a corporation. The corporation will not be allowed to exceed this number in this PAC cycle.	Publish to Portal MAXIMUM CONTRIBUTION Max Contribution Individu. Max Contribution Corpora * Active Contributions Search for records	Yes Recog



Click on the command button Save

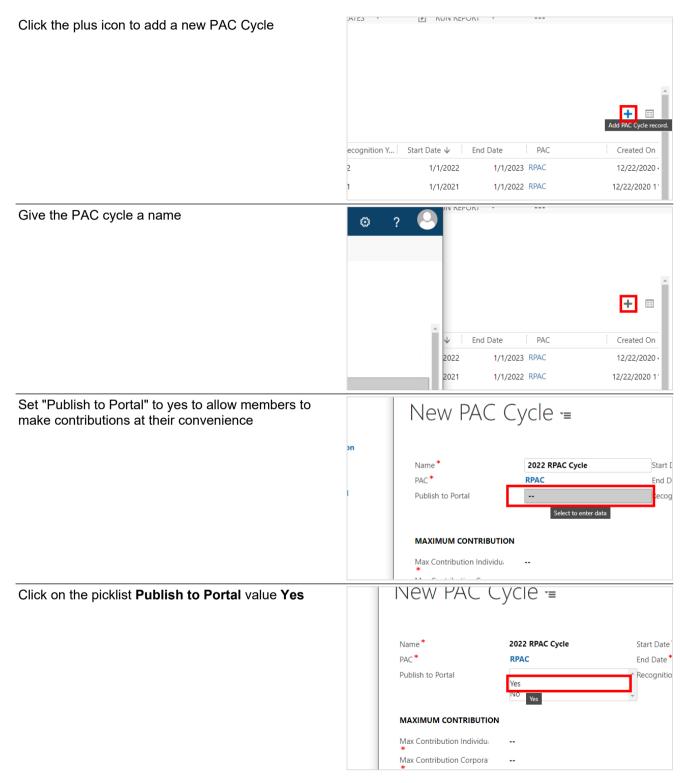
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6.2. PAC Set Up

Create a PAC Cycle 6.2.1.

Open the Navigation Areas	Membership V PACs >
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	RPAC Contribution Hard Dollar Fund Soft Dollar Fund
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Double click the row of a PAC to add a PAC Cycle for it.	🕂 NEW 💼 DELETE 👻 🖘 EMAIL A LINK
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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 Reco
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