



Organizational Membership Application & Management Instructional Handbook

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This Organizational Membership Handbook will provide details and instructions for the following:

- ✓ Roles Defined
- ✓ New Application Process- All Categories
- ✓ Processing & Access Code
- ✓ Accessing the Portal
- ✓ Changes to your Roster
- ✓ Changes to Contact Person Info
- ✓ Annual Dues Renewal Process

Reach out to membership@aacei.org or contact the Member Services Coordinator (MSC) directly at 304-413-0144 if you have questions or need assistance.

ROLES DEFINED

Contact Person (CP): the designated representative for your company.

The Contact Person, herein referred to “CP” is an important and vital link between your organization and AACE International. Be sure to add your name to the roster if you wish to enjoy all the Membership benefits.

The Membership Services Coordinator at AACE International will be referred to as the “MSC” and will work exclusively with the CP.

Contact Person Responsibilities:

1. Manage the designated list of corporate members, including uploading the initial roster, adding members to the roster, removing members from the roster, and approving renewals.
2. Manage CP information in the event of any changes
 - Important: if your position as CP changes, you must provide your replacement’s name and communication details, even if this replacement is temporary
3. Identify the billing address (physical and electronic) as it will appear on your account as well as the invoice
4. Authorize and coordinate Membership dues payment – including initial, additions, and renewal payments
5. Communicate with MSC all questions and concerns regarding your Organizational Membership

After your initial application, as well as any changes you submit throughout the year, is received, the MSC will review and verify each member on your roster. The following items will be checked and verified:

- a. If a profile for listed member is found in our database, this member will keep that AACE ID number, the MSC will update email address
- b. If no profile is found, the MSC will create a new profile and an AACE ID number will be assigned
- c. If a member is already active and paid as a regular member or under a different Organizational Membership, they cannot be included on your roster for the current year
 - * You will have opportunity to include these active member(s) in the next year’s roster

Member Services Coordinator (MSC): the designated staff member for AACE International.

The MSC is your primary contact at AACE International Headquarters to get answers to all of your questions and for support and assistance throughout your membership experience.

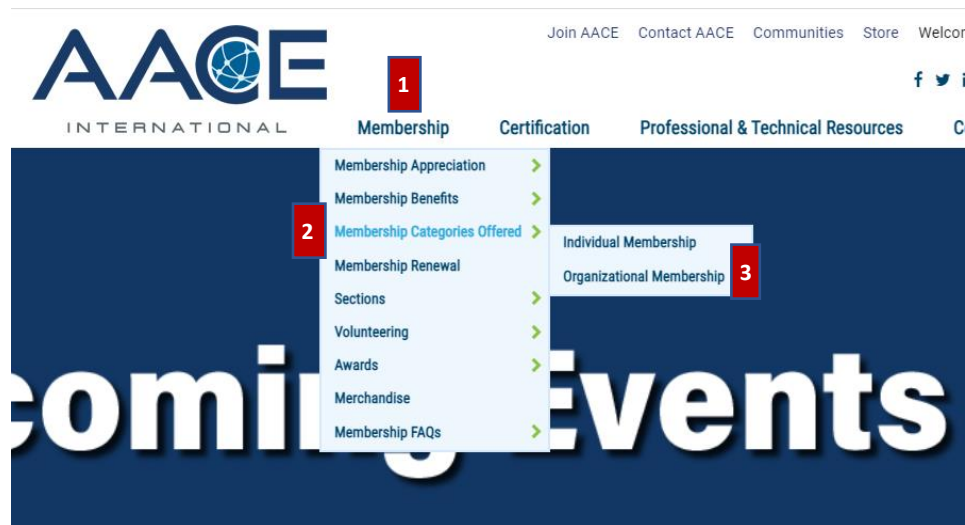
Member Services Coordinator (MSC) Responsibilities:

1. Review and verify all members submitted by CP
2. Prepare and email the invoice for payment, ensuring a timely and accurate delivery
3. Process member(s) to active status on the Organization's roster after payment is received and processed by AACE International
4. Create and issue the unique Access Code to the CP
5. Process member(s) added by the CP
6. Process member(s) removed by CP
7. Communicate annual dues renewal notices and deadlines with CP
8. Follow up with CP to ensure accurate roster and ask for a final approval at dues renewal time

MAKING A NEW APPLICATION (new organizational membership only)

A new organizational membership application is powered by Quickbase – an online database system. You can access the application portal by clicking [here](#) or on our website at web.aacei.org as demonstrated below:

- (1) Hover over Membership
- (2) Scroll to and hover over Memberships Categories Offered
- (3) Select Organizational Membership



The Organizational Membership page details the three membership options to help you to decide which best fits your organization.



Membership in AACE International helps your designated employees stay informed about the complexities of the total cost management profession - plus gain knowledge, find access to networks, and obtain resources to solve complex problems they might face within their department or projects.

By joining one of our discounted or exclusive membership programs, your designated employees will receive all of the same membership benefits as other AACE members - but you keep the savings and get the credit!

Once you decide which organizational membership will best fit your needs, click on the “apply” button that will redirect you to the application.

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Application for Organizational Membership Organizational Membership Portal

Welcome and thank you for your interest in organizational membership. When you're ready, select the blue "NEW APPLICATION" button to complete your application.

If you have questions or need additional information, please contact Member Services Coordinator, Gina Mazzetti at gmazzetti@aace.org or 304-413-0144.

Start here to join AACE

[New Application](#)

Overview of Memberships Offered

Membership Type	Description	Cost	Link to Fact Sheet
Corporate Member	Corporate Membership provides for a discounted group membership for organizations. The base membership starts at a minimum of 10 paid employees; more may be added for a rate of \$750/member.	\$1,900.00	Click here
Public Member	Public Membership provides for a discounted group membership for full-time employees of government (local, state, or federal) and full or part-time professors and full-time faculty and staff of nonprofit or public universities. The base membership starts at a minimum of 10 paid employees; more may be added for a rate of \$750/member.	\$1,500.00	Click here
Corporate Member Plus	Corporate Member Plus provides all the benefits of Corporate Membership, plus the ability to build a customized membership program tailored to their unique needs. The base membership starts at a minimum of 10 paid employee memberships; more may be added for a rate of \$250/member. Due to the nature of this membership, no changes can be made after the open enrollment period closes (May 31).	\$2,500.00 + optional add-ons	Click here

Membership Benefit Comparison

Membership Benefit	Organizational Membership		
	Public Member	Corporate Member	Corporate Member Plus
Source Magazine	\$1,500.00/yr.	\$1,900.00/yr.	\$2,500.00/yr.
Cost Engineering Journal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Cost Management (TCM) Framework	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommended Practices (RPs)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Virtual Library	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Salary Survey	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Discounts: Certification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Discounts: Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once you land on the application page, look for the "New Application" blue button and click it to start your application. NOTE: You will have to complete the application in its entirety – there is no option to save and resume later.

Start here to join AACE



Complete all information as requested. NOTE: All fields with a red * are required fields.

Company:

▼ **Company**

Company Name * <input type="text" value="ABC"/>	Select the type of membership applying for * <input checked="" type="radio"/> Corporate Member <input type="radio"/> Public Member <input type="radio"/> Corporate Member Plus	Membership Status Pending
Address * <input type="text" value="123 Main Street"/>	Country * <input type="text" value="United States"/>	
City or Province * <input type="text" value="Morgantown"/>	State <input type="text" value="West Virginia"/>	Postal Code <input type="text" value="26505"/>
Website * <input type="text" value="www.website.com"/>		

- Enter Company Name
- Select the Membership type: Corporate Member, Public Member, or Corporate Member Plus

NOTE: Membership status will remain as “Pending” until payment is received and processed.

- Enter your physical address, country, city or province, state (if applicable), postal Code (if applicable) and website address.

Purchase Options (for Corporate Member Plus membership only):

If you selected Corporate Member Plus membership type, you have the ability to purchase extra options. It is not mandatory to select Add-On Options, however, once the open enrollment period has ended (May 31) you are not able to purchase add-on options.

▼ Purchase Options

Check the item(s) below that you want in addition to the base membership benefits:

- | | | | | |
|--|---|--|---|---|
| <input checked="" type="checkbox"/> Conference Recordings (collection of previous years) | <input checked="" type="checkbox"/> Conference & Expo with recordings | <input checked="" type="checkbox"/> Publications (CE Notebook, S&K, Cert Study Guides) | <input checked="" type="checkbox"/> Seminars at the Conference & Expo | <input checked="" type="checkbox"/> Exhibit & Sponsorship |
| <input checked="" type="checkbox"/> Exclusive Webinar(s) | <input checked="" type="checkbox"/> CCP Seminar-in-a-Box | <input checked="" type="checkbox"/> CEP Seminar-in-a-Box | <input checked="" type="checkbox"/> EVP Seminar-in-a-Box | <input checked="" type="checkbox"/> PSP Seminar-in-a-Box |

The total cost for any “Add-On Options” you select will be reflected in the Invoicing Details.

Contact Person:

▼ Contact Person

First Name *	Last Name *	Email *	Phone *	Specify if the contact person will also be a member: *	AACE ID# (if known)
<input type="text" value="Gina"/>	<input type="text" value="Mazzetti"/>	<input type="text" value="gmazzetti@aacei.org"/>	<input type="text" value="3044130144"/>	<input checked="" type="radio"/> Contact is also a member <input type="radio"/> Contact is not a member	<input type="text" value=""/>

Enter the designated CP for your organization.

If the CP will be added as a member on your roster, you will select “Contact is also a member” and provide the AACE ID number (if known). If you are unsure of the AACE ID number, the MSC will search the database for a match or create a new profile for this individual who will be included on your roster.

If the CP will not be a member listed on your roster, select “Contact is not a member”.

▼ Contact Person

First Name *	Last Name *	Email *	Phone *	Specify if the contact person will also be a member: *
<input type="text" value="Gina"/>	<input type="text" value="Mazzetti"/>	<input type="text" value="gmazzetti@aacei.org"/>	<input type="text" value="3044130144"/>	<input type="radio"/> Contact is also a member <input checked="" type="radio"/> Contact is not a member

Managing or changing the CP will be covered in a later section.

Membership Roster:

▼ Membership Roster

Indicate the total number of members to be included on your roster.

Corporate Member Roster Total:

10

The minimum for this membership type is 10.

Only change the value if your roster is greater than 10.

Click [here](#) to access and download the Membership Roster template.
Once the form is open:

- Provide the information requested in the form; all fields are necessary.
- Save the file to your computer (remember the file name, and where it is stored)
- Upload the saved document by selecting the **"Choose File"** button.

Upload your membership roster *

Browse... No file selected.

The default value for the for the roster total is 10 because you will be invoiced for a minimum of 10 members. If your roster is greater than 10, replace the default value with your total. The total number you enter will be reflected in the Invoicing Details.

Access and Download the Membership Roster Template.

Click [here](#) to access and download the Membership Roster template.
Once the form is open:

- Provide the information requested in the form; all fields are necessary.
- Save the file to your computer (remember the file name, and where it is stored)
- Upload the saved document by selecting the **"Choose File"** button.

Upload your membership roster *

Browse... No file selected.

Click on the hyperlink to download the Excel template. It will automatically download and usually displays in the bottom left side of your browser screen. If you do not see the file, navigate to your DOWNLOADS folder (typically below your Desktop folder).

Open the Excel file:

	A	B	C	D	E	F	G
1	#	AACEID	First Name	Last Name	Start Date	Preferred Email Address	Phone #
2	1						
3	2						
4	3						
5	4						
6	5						
7	6						
8	7						
9	8						
10	9						
11	10						
12	11						
13	12						
14	13						
15	14						

Provide all requested information and keep in mind if you do not know the AACE ID number, you may leave the cell blank - the MSC will search the database for a match or create a new profile for that individual. When done, save the file; you will want to take note of the file folder location and use an easily identifiable file name, for example: 2022CorpRoster.xlsx.

Upload Your Membership Roster:

▼ Membership Roster

Indicate the total number of members to be included on your roster.

Corporate Member Roster Total:

10

The minimum for this membership type is 10.
Only change the value if your roster is greater than 10.

Click [here](#) to access and download the Membership Roster template.
Once the form is open:

- Provide the information requested in the form; all fields are necessary.
- Save the file to your computer (remember the file name, and where it is stored)
- Upload the saved document by selecting the "Choose File" button.

Upload your membership roster *

Browse...

No file selected.

Select the "Browse" button and navigate to the file you just saved and select OPEN. The file will be attached.

Invoicing Details:

▼ Invoicing Details

Base Cost + additions beyond 10

1900.00

Total Due

1900.00

Your final invoice will reflect any and all changes made after submission of this application.

The total due is based on membership type, total roster count, and any additional options (for Corporate Member Plus only).

The final step is to review your application and agree to the Terms.

Terms & Agreement:

▼ Terms & Agreement

By submitting this application, I certify that I represent the company or organization named in the application and possess financial and administrative permission to request membership for our employees and invoicing the organization according to the current fee structure that may be paid by credit card, check or money order, or wire transfer. I agree to pay any and all banking fees as applicable to the selected mode of payment. I understand this application is subject to further review by AACE Headquarters and may be denied, in which case an explanation will be provided to me. I further attest that all information provided is true and correct to the best of my information and belief.

 ☒ **Agreement ***

Save & close

Cancel

If you are satisfied with your application, Check the "Agreement" box, and click "Save & Close".

When you reach a "Thank you" page, your application has been submitted.

 Application saved

Thank you for your application. You will be contacted by a membership representative soon. In the meantime, if you have any questions or need additional assistance, please contact us at:

membership@ aacei.org or +1.304.413.0144

PROCESSING & ACCESS CODE

After your application is received the MSC will process and provide the CP a unique access code to the Organizational Membership Management Portal. The CP will use the portal to review the final roster and provide authorization for invoicing. Once payment has been processed, the MSC will activate the membership and notify all members on the roster of active membership. The unique code should be kept in a safe and convenient location.

Once you are approved for access, the following tasks can be performed.

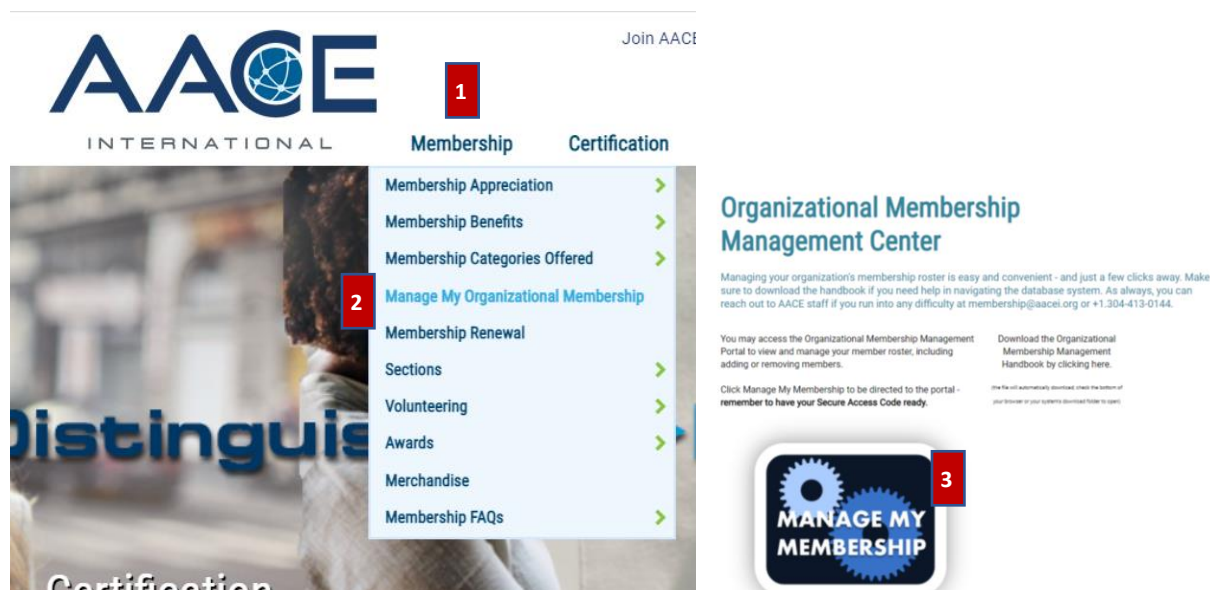
1. Review roster
2. Add new members to your existing roster
3. Remove existing members from your roster
4. Add, change, or update CP name and communication details
5. Prepare membership and roster for renewal

Note: You can add and/or remove members at any time, but we encourage you to only remove members if they are no longer employed by your company.

ACCESSING THE APP:

The CP will have access to the Organizational Membership Management portal 24/7 by [clicking here](#) or through the AACE International [website](#):

- (1) hover over Membership
- (2) select Manage My Organizational Membership
- (3) click the Manage My Membership Button

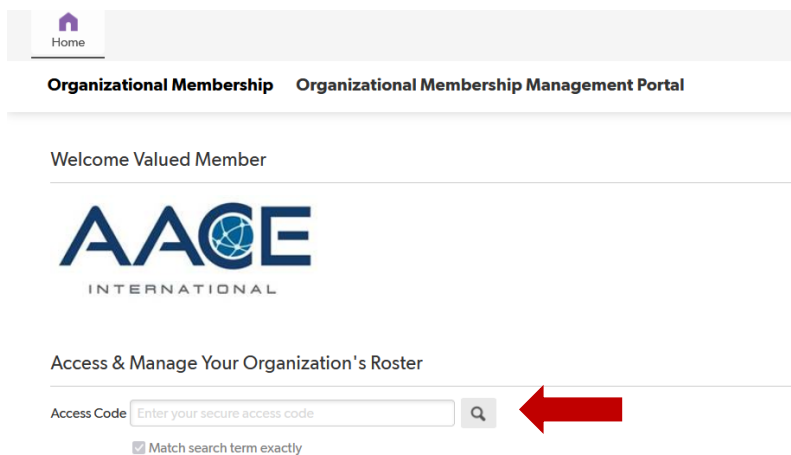


You must know your unique Access Code, issued to you via email, from the Member Services Coordinator. If you are unsure, reach out to membership@acei.org or the Member Services Coordinator directly at 304-413-0144 for assistance.

ADDING A MEMBER TO YOUR ROSTER:

Access the Organizational Management App through the AACE International [website](#) or click [here](#).

Enter your Access Code and hit enter or select the search icon.




Home

Organizational Membership Organizational Membership Management Portal

Welcome Valued Member

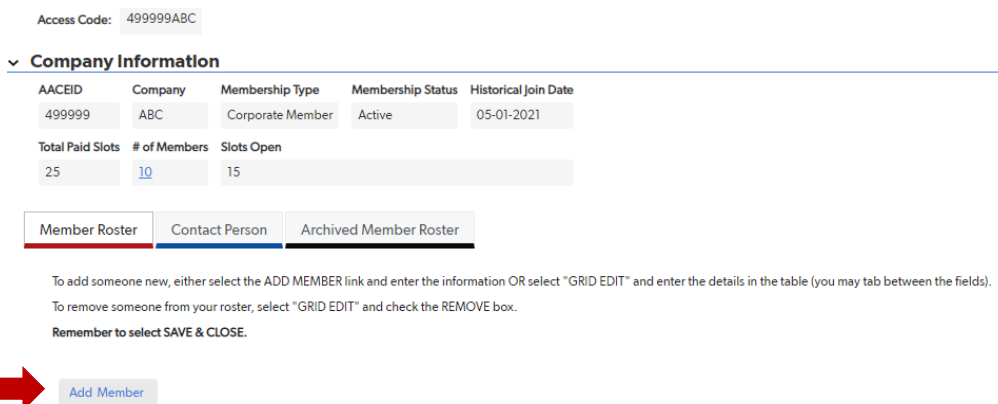
AACE
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Access & Manage Your Organization's Roster

Access Code 

☒ Match search term exactly

Click on "Add Member"



Access Code: 499999ABC


▼ Company Information

AACEID	Company	Membership Type	Membership Status	Historical Join Date
499999	ABC	Corporate Member	Active	05-01-2021

Total Paid Slots: 25 # of Members: 10 Slots Open: 15

Member Roster Contact Person Archived Member Roster

To add someone new, either select the ADD MEMBER link and enter the information OR select "GRID EDIT" and enter the details in the table (you may tab between the fields).
To remove someone from your roster, select "GRID EDIT" and check the REMOVE box.
Remember to select SAVE & CLOSE.

 [Add Member](#)

The fields with a red * are required.

The Company Name field will automatically populate with your Company name.

- Enter the AACE ID#, if known
- Enter First Name
- Enter Last Name
- Enter **Start Date as the date you wish your new member to be added. ***Keep in mind, this member will not be officially moved to active status until the payment is received and processed*
- Enter the preferred Email address

Member Roster > Add Member
▶ Reports & Charts

If you are entering more than one person, use the drop-down arrow and select SAVE & NEW until you have entered all of your members. Then select SAVE & CLOSE.
If you accidentally hit Save & Close before you are done, you will have an opportunity to add more once you are given an Access Code from Headquarters. Please DO NOT add your company again.

Company Name * ABC X

Enter AACE ID# (if known)

First Name *

Last Name *

Start Date * mm-dd-yyyy

Preferred Email Address *

☐ Archive

Save & close Cancel

Click on "Save & close" to save your addition. You will be returned to you home page and will see the new person listed.

If you have more than one person to add, select "Save & New" and a new blank record will display.

Last Name *

Start Date * mm-dd-yyyy

Preferred Email Address *

Save & close Cancel

Save & close
Save & new
Save & keep working

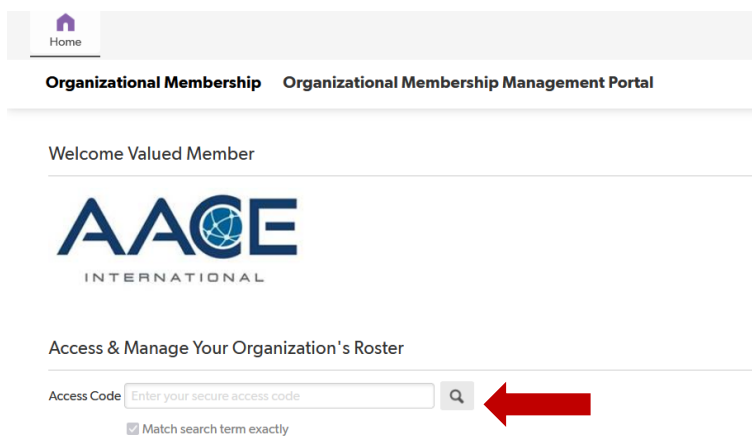
The MSC will receive notification of your submittal. An invoice will be prepared and emailed to the CP. This PDF invoice will have an embedded, customized hyperlink for credit card payment. After payment is received and

processed, new members will move to active status and will remain active through December 31 of the current year.

REMOVE A MEMBER FROM YOUR ACTIVE ROSTER:

Access the Organizational Management App through the AACE International [website](#) or click [here](#).

Enter your Access Code and hit enter or select the search icon.





Home

Organizational Membership Organizational Membership Management Portal

Welcome Valued Member

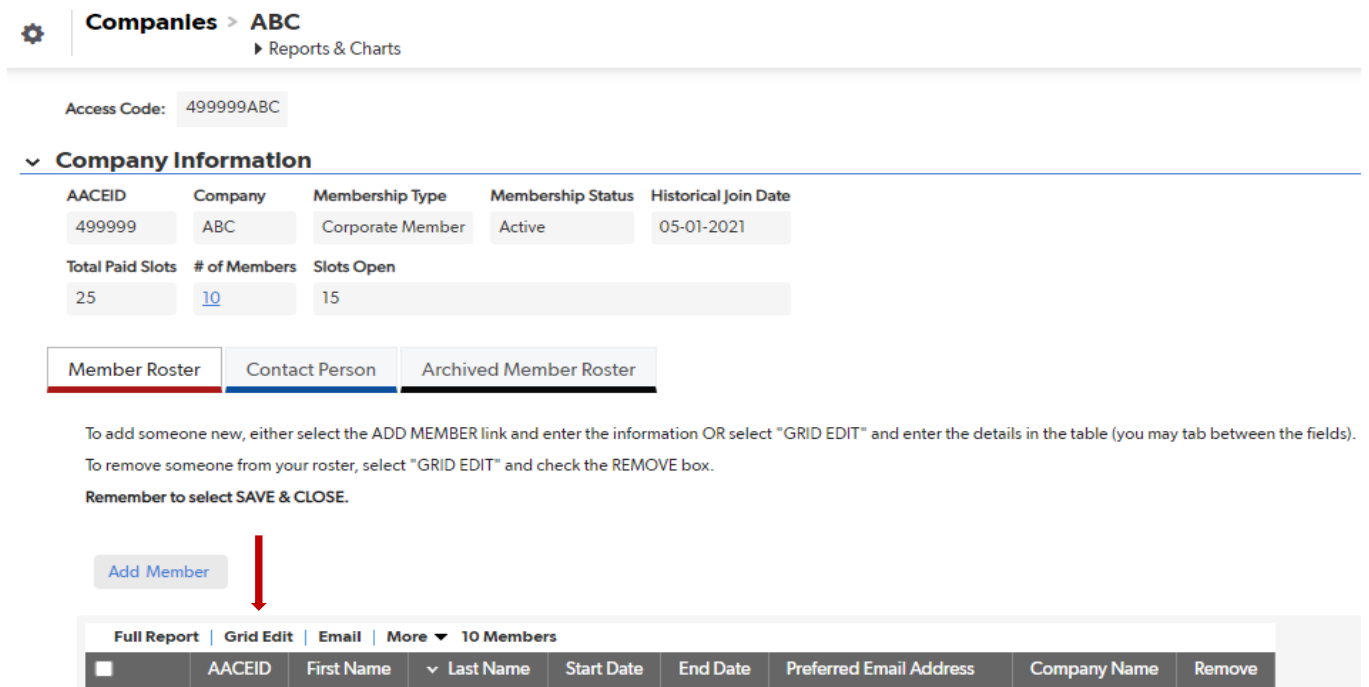
AACE
INTERNATIONAL


Access & Manage Your Organization's Roster

Access Code  

☒ Match search term exactly

Click on "Grid Edit" displayed directly above your roster.



 **Companies** > **ABC**
▶ Reports & Charts

Access Code: 499999ABC


▼ **Company Information**

AACEID	Company	Membership Type	Membership Status	Historical Join Date
499999	ABC	Corporate Member	Active	05-01-2021

Total Paid Slots: 25 # of Members: [10](#) Slots Open: 15

Member Roster | **Contact Person** | **Archived Member Roster**

To add someone new, either select the ADD MEMBER link and enter the information OR select "GRID EDIT" and enter the details in the table (you may tab between the fields).
To remove someone from your roster, select "GRID EDIT" and check the REMOVE box.
Remember to select SAVE & CLOSE.

[Add Member](#) 





Full Report | **Grid Edit** | **Email** | **More** ▼ 10 Members

<input type="checkbox"/>	AACEID	First Name	▼ Last Name	Start Date	End Date	Preferred Email Address	Company Name	Remove
--------------------------	--------	------------	-------------	------------	----------	-------------------------	--------------	--------



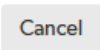
Navigate to the person you want to remove and enter the effective end date and select the "Remove" box. Continue this action for additional members to remove.

Member Roster **Company Roster - current**



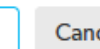
New Member More ▾





	AACEID	First Name	▾ Last Name	Start Date	End Date	Preferred Email Address	Company Name	Remove
		Sue	Doe	02-01-2019	08-12-2021	sdoe@whoolery.com	Whoolery Training LLC	<input checked="" type="checkbox"/>
		Bob	Doe	06-04-2020		bdoe@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
		Jane	Doe	07-01-2021		jdoe@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
		Beth	Moore	08-13-2021		bmoore@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>

Select Apply Changes

Select Save to complete and save all changes

Full Report	Grid Edit	Email	More ▾	4 Members				
	AACEID	First Name	▾ Last Name	Start Date	End Date	Preferred Email Address	Company Name	Remove
		Sue	Doe	02-01-2019	08-12-2021	sdoe@whoolery.com	Whoolery Training LLC	<input checked="" type="checkbox"/>
		Bob	Doe	06-04-2020		bdoe@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
		Jane	Doe	07-01-2021		jdoe@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
		Beth	Moore	08-13-2021		bmoore@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>

The MSC will receive notification of your submittal and move this removed member to your "Archived Member Roster".

Your account will reflect the open slot(s) if you did not replace this member. Removed members can be viewed in your Archived Member Roster tab.

TO VIEW YOUR ARCHIVED MEMBER ROSTER


Access the Organizational Management App through the AACE International [website](#) or click [here](#).

Enter your Access Code and hit enter or select the search icon.

[Home](#)

Organizational MembershipOrganizational Membership Management Portal

Welcome Valued Member



Access & Manage Your Organization's Roster

Access Code

☒ Match search term exactly

Select the "Archived Member Roster" tab

CompaniesXYZ Company

Create your company information first.
Select the Contact tab to enter your designated representative.
Select the Member Roster tab to enter your members.

Access Code589746XYZ

Company

AACEID	Company	Membership Status	HistJoinDt
589746	XYZ Company	Active	04-13-2021

Current Member Roster

Contact Person

Archived Member Roster

Full ReportGrid EditEmailMore1 Member

	AACEID	First Name	Last Name	Start Date	End Date	Preferred Email Address	Company Name	Remove	Archive
NEW	123456	Bob	Builder	04-13-2021	07-07-2021	bob@builder.com	XYZ Company	✓	✓

The Archived Member Roster is view only; you are not able make changes. If you feel there is a discrepancy, reach out to the MSC.

ADDITIONAL OR CHANGING CONTACT PERSON INFORMATION:


Any time you need to add, update, change, or replace CP information.

Go to the [Quickbase App](#) and enter your unique ACCESS Code.


[Home](#)

Organizational Membership Organizational Membership Management Portal

Welcome Valued Member



Access & Manage Your Organization's Roster

Access Code 

☒ Match search term exactly

Click on the "Contact Person" tab

Companies ABC


Create your company information first.
Select the Contact tab to enter your designated representative.
Select the Member Roster tab to enter your members.

Access Code

Company

AACEID	Company	Membership Status	HistJoinDt
499999	ABC	Active	05-01-2021

Current Member Roster

Contact Person

Archived Member Roster

Click on "Add Contact":

Companies ABC

Create your company information first.
Select the Contact tab to enter your designated representative.
Select the Member Roster tab to enter your members.



Access Code 499999ABC

Company

AACEID	Company	Membership Status	HistJoinDt
499999	ABC	Active	05-01-2021

Current Member Roster Contact Person Archived Member Roster

Add Contact

Full Report Grid Edit Email More ▾ 1 Contact							
	Record ID#	FirstName	LastName	Email	Phone	Membership	Related Company2 - Company Name
<div>NEW  </div>	416	Missy	Smart	smart@me.com	4567891156	Contact is not a member	ABC

If the new or additional CP is not a member, select "Contact is not a member". Continue to enter the new or additional CP information:

Contacts Add Contact

Membership

Contact is not a member

FirstName

Gina

LastName

Mazzetti

Email

Gmazzetti@acei.org

Phone

3044130144

Title

Coordinator Member Services

Company Name

ABC

Save & close

Cancel

If the new or additional CP is already a member, or has an AACE ID, select "Contact is also a member" and enter the AACE ID#. Continue to enter the new or additional CP information:

Contacts Add Contact

The screenshot shows the 'Add Contact' form. A red arrow points to the 'Membership' dropdown menu, which is set to 'Contact is also a member'. Another red arrow points to the 'AACEID#' field, which contains '000000'. Below these are input fields for 'FirstName' (Gina), 'LastName' (Mazzetti), 'Email' (Gmazzetti@aacei.org), 'Phone' (3044130144), 'Title' (Coordinator Member Services), and 'Company Name' (ABC). A third red arrow points to the 'Save & close' button.

Select "Save & close"

ANNUAL ORGANIZATIONAL MEMBERSHIP DUES RENEWAL PROCESS

Access the Organizational Management App through the AACE International [website](#) or click [here](#).

Enter your Access Code and hit enter or select the search icon.

The screenshot shows the 'Organizational Membership Management Portal'. It includes a 'Home' link, a welcome message 'Welcome Valued Member', the AACE International logo, and a section titled 'Access & Manage Your Organization's Roster'. In this section, there is an 'Access Code' input field with the placeholder text 'Enter your secure access code' and a search icon (magnifying glass) to its right. A red arrow points to the search icon. Below the input field is a checkbox labeled 'Match search term exactly'.

To identify members, you do not want to renew for the next year:

Click on "Grid Edit" displayed directly above your roster.



Companies > ABC

► Reports & Charts

Access Code: 499999ABC

Company Information

AACEID	Company	Membership Type	Membership Status	Historical Join Date
499999	ABC	Corporate Member	Active	05-01-2021
Total Paid Slots	# of Members	Slots Open		
25	10	15		

Member Roster Contact Person Archived Member Roster

To add someone new, either select the ADD MEMBER link and enter the information OR select "GRID EDIT" and enter the details in the table (you may tab between the fields).
To remove someone from your roster, select "GRID EDIT" and check the REMOVE box.













Remember to select SAVE & CLOSE.

Add Member

Full Report | Grid Edit | Email | More ▾ 10 Members

<input type="checkbox"/>	AACEID	First Name	▾ Last Name	Start Date	End Date	Preferred Email Address	Company Name	Remove
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Navigate to the person you do not want renewed for the next year, **enter December 31 of the current year (ex: 12/31/2021) in the end date field** and **check the "Remove" box**. Continue this action for additional members to not renew.

Full Report Grid Edit Email More ▾ 6 Members								
<input type="checkbox"/>	AACEID	First Name	▾ Last Name	Start Date	End Date	Preferred Email Address	Company Name	Remove
<input type="checkbox"/>	 	Sue	Doe	02-01-2019	12-31-2021	sdoe@whoolery.com	Whoolery Training LLC	<input checked="" type="checkbox"/>
<input type="checkbox"/>	 	Bob	Doe	06-04-2020		bdoe@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
<input type="checkbox"/>	 	Jane	Doe	07-01-2021		jdoe@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
<input type="checkbox"/>	 	Nancy	Green	08-14-2021	12-31-2021	ngreen@whoolery.com	Whoolery Training LLC	<input checked="" type="checkbox"/>
<input type="checkbox"/>	 	Bill	Moore	08-13-2021		billmoore@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
<input type="checkbox"/>	 	Beth	Moore	08-13-2021		bmoore@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>

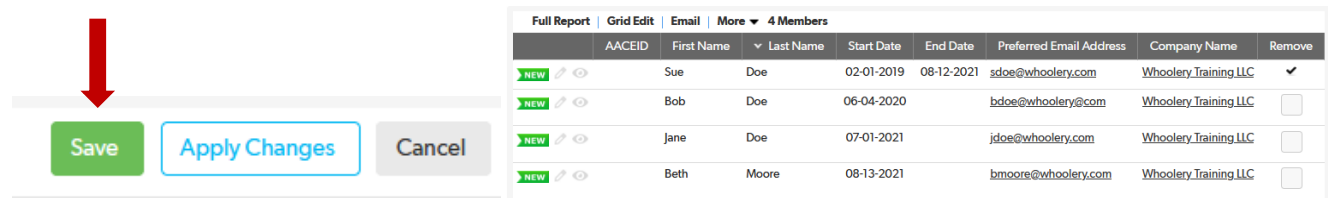
Select Apply Changes

Save

Apply Changes

Cancel

Select Save to complete and save all changes



	AACEID	First Name	Last Name	Start Date	End Date	Preferred Email Address	Company Name	Remove
NEW		Sue	Doe	02-01-2019	08-12-2021	sdoe@whoolery.com	Whoolery Training LLC	<input checked="" type="checkbox"/>
NEW		Bob	Doe	06-04-2020		bdoe@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
NEW		Jane	Doe	07-01-2021		jdoe@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>
NEW		Beth	Moore	08-13-2021		bmoore@whoolery.com	Whoolery Training LLC	<input type="checkbox"/>

Buttons: Save, Apply Changes, Cancel

The MSC will receive notification of your submittal and not include those identified on your renewal invoice and roster, who will be moved to the "Archived Member Roster" in January.

Your account will reflect the open slot(s) if you did not replace this member. Removed members can be viewed in your Archived Member Roster tab.

To add members to next year's roster:

Click on "Add Member"

Access Code: 499999ABC

Company Information

AACEID	Company	Membership Type	Membership Status	Historical Join Date
499999	ABC	Corporate Member	Active	05-01-2021

Total Paid Slots	# of Members	Slots Open
25	10	15

Member Roster | Contact Person | Archived Member Roster

To add someone new, either select the ADD MEMBER link and enter the information OR select "GRID EDIT" and enter the details in the table (you may tab between the fields).
 To remove someone from your roster, select "GRID EDIT" and check the REMOVE box.
 Remember to select SAVE & CLOSE.



The fields with a red * are required.

The Company Name field will automatically populate with your Company name.

- Enter the AACE ID#, if known
- Enter First Name
- Enter Last Name
- **Enter January 1 of the next year in the "START DATE" field (ex: 01/01/2022)**
- Enter the preferred Email address

Member Roster > **Add Member**
 ▶ Reports & Charts

If you are entering more than one person, use the drop-down arrow and select SAVE & NEW until you have entered all of your members. Then select SAVE & CLOSE.
 If you accidentally hit Save & Close before you are done, you will have an opportunity to add more once you are given an Access Code from Headquarters. **Please DO NOT add your company again.**

Company Name * X

Enter AACE ID# (if known)

First Name *

Last Name *

Start Date * 📅

Preferred Email Address *

☐ Archive

Save & close Cancel

Click on "Save & close" to save your addition. You will be returned to you home page and will see the new person listed.

If you have more than one person to add, select "Save & New" and a new blank record will display.

Last Name *

Start Date * 📅

Preferred Email Address *

Save & close Cancel

Save & close
 Save & new
 Save & keep working

The MSC will receive the information and prepare your renewal invoice and roster to reflect the addition(s).

Making Payment

After final approval is received by the contact person, an invoice is provided for payment. Three options for payment are:

Credit card payment instructions:

- Click the credit card payment link on the invoice
- Provide credit card payment details
- Submit payment

Check payment instructions:

- Enclose a copy of the invoice and check made payable to AACE International, and mail to: **AACE International, Attention: Membership, 726 East Park Avenue #180, Fairmont, WV 26554**
- Upon receipt and processing of your check payment, a confirmation will be sent to you via email

Wire transfer payment instructions:

- View our [Wire Transfer Policy](#) and use the account details to complete your wire transaction
- Upon receipt and processing of your wire transfer payment, a confirmation will be sent to you via email