Organizational Membership Application & Management Instructional Handbook

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quickbase
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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.

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

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

Company:
• 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.

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

**Contact Person:**

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”.

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

**Membership Roster:**

The default value 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 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:
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:

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

**Invoicing Details:**

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:**
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@aaeoi.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@aacei.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.

![Organizational Membership App](image)

Click on “Add Member”

![Add Member](image)

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

Click on “Save & close” to save your addition. You will be returned to your 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.

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.

![Organizational Membership Management Portal](image)

Click on “Grid Edit” displayed directly above your roster.
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.

Select Apply Changes

Select Save to complete and save all changes

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.
Select the “Archived Member Roster” tab

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.
Click on the “Contact Person” tab

Click on “Add Contact”:
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:

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:
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.

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

Click on “Grid Edit” displayed directly above your roster.
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.

Select Apply Changes
Select Save to complete and save all changes

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”

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
Click on “Save & close” to save your addition. You will be returned to your 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.

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