

# Managing your AACE Membership for Organizational & Public Members

This handbook will assist you in understanding our database system and processes to manage your organizational membership account and roster.

## **New organizational members:**

Identify a contact person for your company. Go to the AACE International website under Membership>Join>Organizational Membership. Select the applicable “Apply for Organizational Membership” or “Apply for Public Membership” button to apply.

Please allow 48 hours for processing. You will receive an email notification with instructions on how to proceed with making the payment and managing the roster.

## **Current organizational members:**

The system will replace our retired Quickbase system, allowing the contact person with permission to manage your organizational membership account and roster. One of the major changes will be the ease of adding members to your roster, removing members from your roster, and processing payments. The system will allow you to add and pay for roster slots without the member services coordinator preparing a PDF invoice. The PDF invoice can be provided upon request if an organization requires special billing. Each new member and all designated contacts are responsible for finding or creating their AACE profile.

## **Account roles’ permissions and their definitions:**

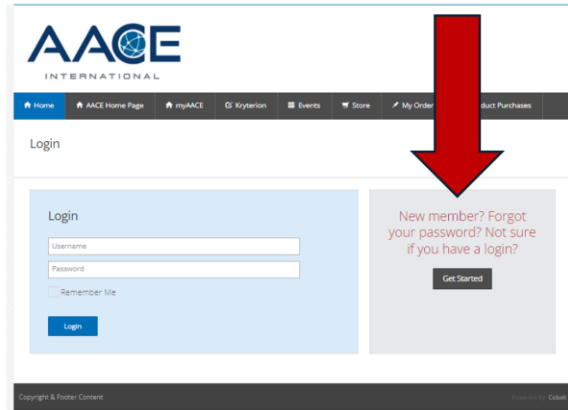
1. **Manage Account without Member Benefits:** Manages Account - no membership included
2. **Invoice and Payment Manager:** No member benefits
3. **Manage Account and Receive Membership:** Can manage roster and receive benefits
4. **Roster Member:** Receives membership benefits

## **Accessing your profile:**

You will find a new login screen when you access your profile through the AACE International [website](#).

## **Instructions for your first time logging in:**

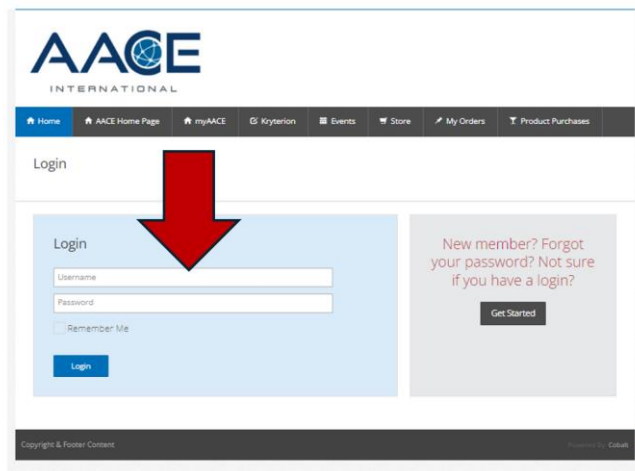
The **first time you log in** to the system, select “Get Started.” Enter your email address. If you have an AACE profile, you will be prompted to reset your password, and then you can proceed. If your email is not found in our system, you will be prompted to create a profile.



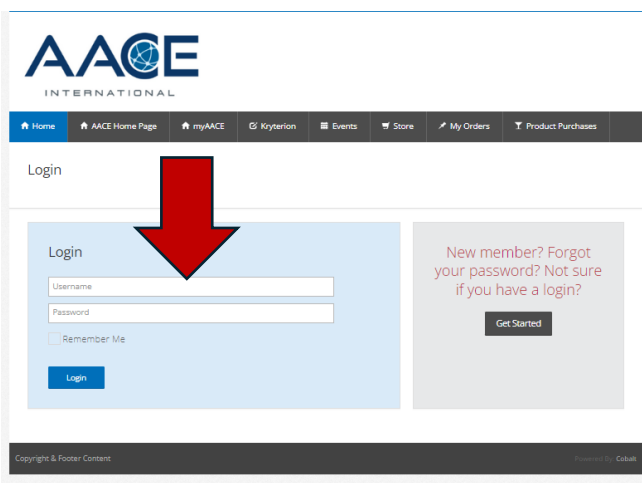
The screenshot shows the AACE International website's login page. At the top is the AACE International logo. Below it is a navigation bar with links: Home, AACE Home Page, myAACE, Kryterion, Events, Store, My Order, and Product Purchases. The main heading is "Login". On the left is a login form with fields for "Username" and "Password", a "Remember Me" checkbox, and a "Login" button. On the right is a grey box with the text "New member? Forgot your password? Not sure if you have a login?" and a "Get Started" button. A large red arrow points from the top of the page down to the login form.

### Instructions for returning users:

Enter your username (your email address) and your password.



This is a duplicate of the first screenshot, showing the AACE International login page. It includes the logo, navigation bar, "Login" heading, login form with "Username" and "Password" fields, a "Remember Me" checkbox, a "Login" button, and a "Get Started" button for new members. A large red arrow points to the login form.



This is another duplicate of the first screenshot, showing the AACE International login page. It includes the logo, navigation bar, "Login" heading, login form with "Username" and "Password" fields, a "Remember Me" checkbox, a "Login" button, and a "Get Started" button for new members. A large red arrow points to the login form.

After successfully logging in, you will notice options below the organization name that are displayed in accordance with the permissions you have been granted.

In the example below, the contact has the role of Account Manager. They can Pay and view Account Orders and Manage Rosters but do not receive member benefits.

The screenshot displays the user interface for an AACE International account. On the left, under 'Organizational Membership', it states 'Your account has an active membership.' and lists organizational details: Join Date - 3/20/2024 and Expiration Date - 12/31/2024. Below this, it mentions 'Your may apply for additional membership on behalf of your account.' and lists two options: 'Account Membership - Account Offers Roster Membership - This is a Membership for an Account that will include Roster Members' and 'Public - Membership for public organizations (governmental or educational institutions)'. On the right, the 'Gina Testing Company' profile is shown with Customer ID - 11233731FMX. A red arrow points to the 'Pay & View Account Orders' and 'Manage Roster' links, which are both checked. A 'Manage Account Details' button is also visible.

This is a duplicate of the screenshot above, showing the same user interface for the AACE International account of Gina Testing Company. It highlights the 'Pay & View Account Orders' and 'Manage Roster' links with a red arrow.

These options will allow you to:

- Check the status of your Open Orders and Order History
- Submit all payments
- Add members to your roster
- Remove members from your roster

## Instructions to add new members to your roster:

1. Select Manage Roster, Current Roster, then Add Contact

**AACE INTERNATIONAL**

Organizational Membership Testing | Logout

Home | AACE Home Page | myAACE | Kryterion | Events | Store | My Orders | Product Purchases

### Current Account Roster

Please see the current account roster below. If you want to edit the permissions of a specific contact, please click the contact name.

**Current Roster**

Search Reset

	Full Name	Date Affiliated	Permissions
<input type="checkbox"/>	Organizational Membership Testing	3/29/2024	Account Manager

1 Page Size: 15 1 item in 1 page

Max Roster Size: 10 Slots Remaining: 9

Remove Contact(s) Add Contact Buy More Slots

2. After you enter the member's first and last name, email address, and start date, you must select an option under permissions. Roster member is the most common and the one you will likely use unless you add a new account or billing manager. Always refer to the list on page 1 to make the appropriate choice Select Submit.

First Name

Last Name

Email Address

Start Date (optional)

End Date (optional)

**Permissions**

☐ Account Manager: Manages Account - no membership included

☐ Invoice and Payment Manager: No membership included

☐ Manage Account & Receives Membership: Can manage roster and receives benefits

☐ Roster Member: Receives membership benefits

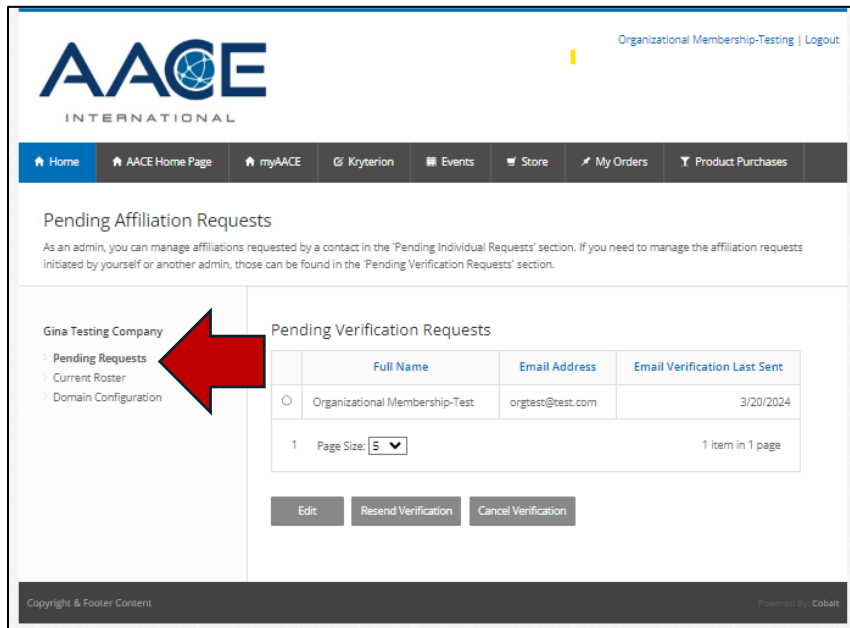
Back Submit

3. The new member will receive an email to verify their profile. If a profile does not exist, they will be prompted to create one and will remain on the pending requests tab. Once they verify and created a profile, they will automatically move to the current roster tab. All members will appear on your roster but will not have active membership until the membership order has been paid.

- After adding a member to your roster, a message will remind you of the verification process.

penelope Pitstop has been added to the roster and an email has been sent to penelope.pitstop@testcobalt.com. Once they complete the verification process they will be moved to the active roster.

- You can view all unverified members under the Pending Requests tab. You have the option to Resend or Cancel Verification.



**AACE INTERNATIONAL**

Organizational Membership-Testing | Logout

Home | AACE Home Page | myAACE | Kryterion | Events | Store | My Orders | Product Purchases

### Pending Affiliation Requests

As an admin, you can manage affiliations requested by a contact in the 'Pending Individual Requests' section. If you need to manage the affiliation requests initiated by yourself or another admin, those can be found in the 'Pending Verification Requests' section.

**Gina Testing Company**

- Pending Requests
- Current Roster
- Domain Configuration

### Pending Verification Requests

	Full Name	Email Address	Email Verification Last Sent
<input type="radio"/>	Organizational Membership-Test	orgtest@test.com	3/20/2024

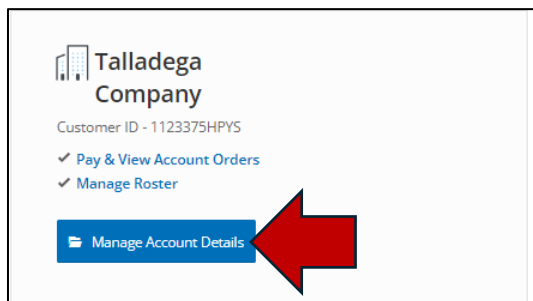
1 Page Size: 5 1 item in 1 page

Edit Resend Verification Cancel Verification

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### To Purchase extra roster slots:

- Click on “Manage Roster” in your organization tile.



**Talladega Company**

Customer ID - 1123375HPYS

- ✓ Pay & View Account Orders
- ✓ Manage Roster

Manage Account Details

- Click “Current Roster”

**AACE INTERNATIONAL**

Ricky Bobby | Logout

Home AACE Home Page myAACE Kryterion Events Store My Orders Product Purchases

### Pending Affiliation Requests

As an admin, you can manage affiliations requested by a contact in the 'Pending Individual Requests' section. If you need to manage the affiliation requests initiated by yourself or another admin, those can be found in the 'Pending Verification Requests' section.

**Talladega Company**

- Pending Requests
- Current Roster**
- Domain Configuration

#### Pending Verification Requests

There are no outstanding requests still requiring verification at this time.

Edit Resend Verification Cancel Verification

### 3. Select “Buy More Slots”

**AACE INTERNATIONAL**

Organizational Membership-Testing | Logout

Home AACE Home Page myAACE Kryterion Events Store My Orders Product Purchases

### Current Account Roster

Please see the current account roster below. If you want to edit the permissions of a specific contact, please click the contact name.

**Gina Testing Company**

- Pending Requests
- Current Roster**
- Domain Configuration

#### Current Roster

Search Reset

	Full Name	Date Affiliated	Permissions
<input type="checkbox"/>	<a href="#">Organizational Membership-Testing</a>	3/20/2024	Account Manager

1 Page Size: 15 1 item in 1 page

Max Roster Size  
10

Slots Remaining  
9

Remove Contact(s) Add Contact Buy More Slots

### 4. Select the number of extra slots you want to purchase, then Update:

**AACE INTERNATIONAL**

Organizational Membership Testing | Log

Home AACE Home Page myAACE MyAACE Events Store My Orders Product Purchases

### Cart

Please review your cart below. You can edit or remove classes, meeting, etc below.

To update the quantity of a store product, select '1' or '1' on the product below and click 'Update'.

Once you are ready to check out, click 'Checkout' on the right hand side.

Save by signing up for a membership today!

Account Membership - Account Offers Roster Membership

2024 Q2 Org Roster Slot

Update Remove

Coupon Codes

You don't have any coupons.

Apply

Order Summary

Subtotal:	\$2,152.50
Discount:	\$0.00
Tax:	\$0.00
<b>Order Total:</b>	<b>\$2,152.50</b>

Checkout

5. Click “Checkout,” enter your payment information, and continue:

**AACE INTERNATIONAL**

Organizational Membership Testing | Log

Home AACE Home Page myAACE MyAACE Events Store My Orders Product Purchases

### Payment Information

Enter in your payment information below. Click 'Continue' to proceed to the submission confirmation page.

☒ Your credit and debit cards ☐ Use another card

Card Type: Visa

Card Number: 1234 5678 9101 1111

Expiration Date (MM/YYYY): February 2028

Security Code (CVV/CV2): 123

First Name: Test

Last Name: Test

Save this card to my profile

None - Enter Address Mailing Address Billing Address

Street Address 1: 726 East Park Avenue, #180

State/Province: West Virginia

Street Address 2:

Postal Code: 26554

City: Fairmont

Country: United States

Order Summary

Subtotal:	\$2,305.00
Discount:	\$0.00
Tax:	\$0.00
<b>Order Total:</b>	<b>\$2,305.00</b>

Back Cancel Continue

6. Review the total and select “Pay Now”:

**AACE INTERNATIONAL**

Organizational Membership Testing | Log

Home AACE Home Page myAACE MyAACE Events Store My Orders Product Purchases

### Payment Submission

Please review your products below. Click 'Pay Now' to complete the payment process.

Account Membership - Account Offers Roster Membership

Application \$2,000.00

Product	Qty	Price	Tax	Discount	Total
Basic Member Application Product	1	\$100.00	\$0.00	\$0.00	\$100.00
New Organizational Membership cost	1	\$1,900.00	\$0.00	\$0.00	\$1,900.00

2024 Q2 Org Roster Slot

Qty	Price	Tax	Discount	Total
2	\$112.50	\$0.00	\$0.00	\$225.00

Order Summary

Subtotal:	\$2,305.00
Discount:	\$0.00
Tax:	\$0.00
<b>Order Total:</b>	<b>\$2,305.00</b>

Payment Details

Payment Total: \$2,305.00

Test Test

Visa 1234 5678 9101 1111

Exp: 02/2028

Billing Address

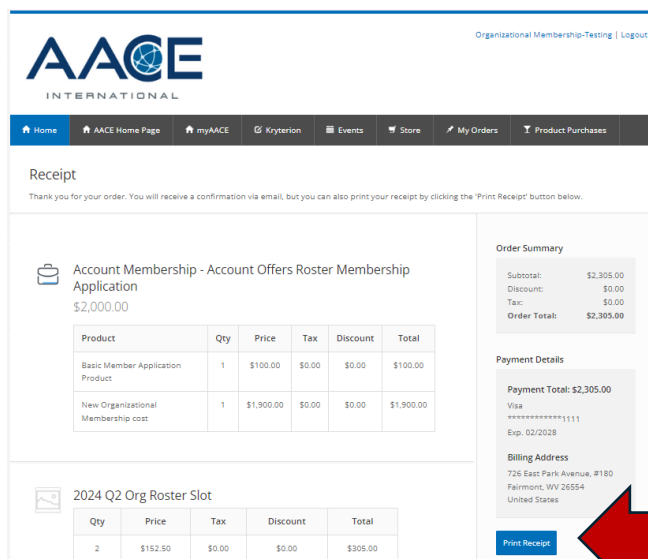
726 East Park Avenue, #180

Fairmont, WV 26554

United States

Back Cancel Pay Now

Once you submit payment, you'll land on the receipt page. Select "Print Page" if you wish. You will also receive an email with a receipt.



**AACE INTERNATIONAL**

Organizational Membership-Testing | Logout

Home AACE Home Page myAACE Kryterion Events Store My Orders Product Purchases

### Receipt

Thank you for your order. You will receive a confirmation via email, but you can also print your receipt by clicking the "Print Receipt" button below.

Account Membership - Account Offers Roster Membership Application  
\$2,000.00

Product	Qty	Price	Tax	Discount	Total
Basic Member Application Product	1	\$100.00	\$0.00	\$0.00	\$100.00
New Organizational Membership cost	1	\$1,900.00	\$0.00	\$0.00	\$1,900.00

**Order Summary**

Subtotal: \$2,305.00  
Discount: \$0.00  
Tax: \$0.00  
Order Total: \$2,305.00

**Payment Details**

Payment Total: \$2,305.00  
Visa  
\*\*\*\*\*1111  
Exp. 02/2028  
Billing Address  
726 East Park Avenue, #180  
Fairmont, WV 26554  
United States

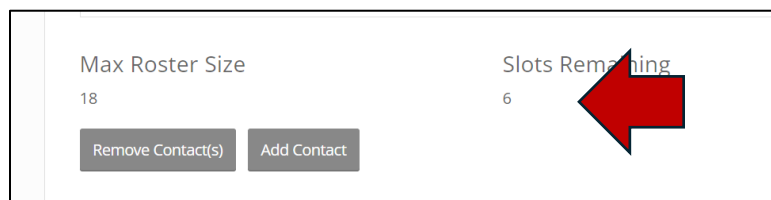
[Print Receipt](#)

2024 Q2 Org Roster Slot

Qty	Price	Tax	Discount	Total
2	\$152.50	\$0.00	\$0.00	\$305.00

**Please allow 15-30 minutes for the transaction to process.**

You will know how many slots remain at the bottom of your current roster. You may add new members to fill these empty slots before the end of the current year.



Max Roster Size

18

[Remove Contact\(s\)](#) [Add Contact](#)

Slots Remaining

6

### Removing member(s) from your current roster:

1. Select Manage Roster from your home page
2. Select Current Roster from the left side member
3. Click the checkbox by the member's name you want to remove. To remove more than one, click the checkbox for each member's name.

Current Roster

✕

	Full Name	Date Affiliated	Permissions
<input type="checkbox"/>	Beyonce Knowles	6/19/2023	Roster Member
<input checked="" type="checkbox"/>	Janis Joplin	6/19/2023	Roster Member
<input type="checkbox"/>	Lauryn Hill	6/18/2023	Roster Member
<input type="checkbox"/>	Mary Blige	6/19/2023	Manage Account & Receives Membership
<input type="checkbox"/>	Melanie Fiona	6/19/2023	Roster Member
<input type="checkbox"/>	Susan Tedeschi	6/12/2023	Roster Member
<input checked="" type="checkbox"/>	Taylor Swift	6/1/2023	Manage Account & Receives Membership

1 Page Size:  7 items in 1 page

Max Roster Size 18 Slots Remaining 4


4. Select Remove Contact(s)

5. The system will immediately remove the select member from your roster, and they will be notified.


### Manage Account Details

This feature is reserved for those granted permission to manage the account (see roles' definition on page 1).

1. Select Manage Account Details:


 **Female Singer Group**

Customer ID - ACT000041LPFA

 1234567890

✓ [Pay & View Account Orders](#)

✓ [Manage Roster](#)

 [Manage Account Details](#)

There are four options listed on the left-hand side:

Home | AACE Home Page

### Account Information

Please update your account information

Female Singer Group

- > Account Information
- > Mailing Address
- > Billing Address
- > Organization Demographics

Account Information is where you'll tell us how we can get in touch with you:

**Please do not use your name in the Name field.** This should always remain the Organization's Name.

Home | AACE Home Page | myAACE | Kryterion | Events | Store | My Orders | Product Purchases

### Account Information

Please update your account information below.

Female Singer Group

- Account Information
- Mailing Address
- Billing Address
- Organization Demographics

Name: Female Singer Group

Phone (optional): United States | 1234567890

Website (optional): https://www.femalesingergroup.com

E-mail (optional): female@singergroup.com

Update

**Please do not use your email address;** use a unique one for the company that is different from yours. The system performs incorrectly and will cause login errors when two profiles use the same email address.

Mailing Address is where you'll provide the organization's mailing address:

### Account Mailing Address

Please update the account mailing address below. Select your country before choosing your state/province.

Female Singer Group

- Account Information
- Mailing Address
- Billing Address
- Organization Demographics

Street Address 1: Celebrity Avenue

State/Province: New York

Street Address 2:

Postal Code: 12202

City: New York

Country: United States

Update

Billing address is where you'll provide a billing address if it is different than the mailing address:



**Account Billing Address**  
Please update the account billing address below. Select your country before choosing your state/province.

**Female Singer Group**  
Account Information  
Mailing Address  
**Billing Address**  
Organization Demographics

☒ Enter Address ☐ Mailing Address

Street Address 1  
Street Address 2  
City

State/Province  
Postal Code  
Country  
United States

**Update**

If the billing address is the same, select the Mailing Address radio button, and it will automatically transfer:



**Account Billing Address**  
Please update the account billing address below. Select your country before choosing your state/province.

**Female Singer Group**  
Account Information  
Mailing Address  
**Billing Address**  
Organization Demographics

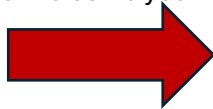
☐ Enter Address ☒ Mailing Address

Street Address 1  
1 Celebrity Avenue  
Street Address 2  
City  
New York

State/Province  
New York  
Postal Code  
12202  
Country  
United States

**Update**

Organizational Demographics is where you will provide information so that we can learn more about your organization to serve you better:



**Organizational Details**  
Please provide or update the information below. This information will help us to serve you better. If you encounter any issues, please contact us at [info@aaacei.org](mailto:info@aaacei.org) +1-304-298-8444.

**Female Singer Group**  
Account Information  
Mailing Address  
Billing Address  
Organization Demographics

**Organization Type**  
Select all types that apply (optional)

☐ Asset Owner  
☐ Consultant  
☐ Government Organization  
☒ Contractor/Performing Organization  
☐ Public Organization

**Update**

Contact [membership@aaacei.org](mailto:membership@aaacei.org) if you need additional information or have any questions. We are here to help you through this new system process.