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.

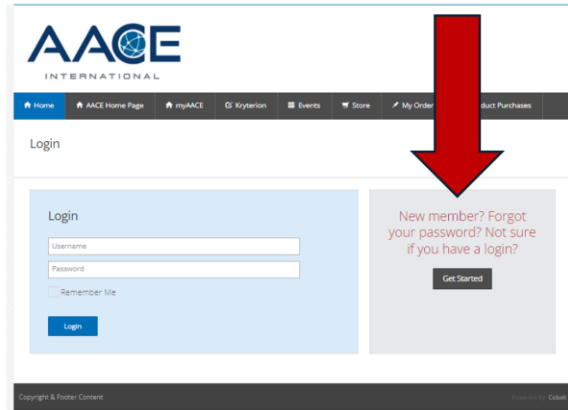**Account roles' permissions and their definitions:**

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.
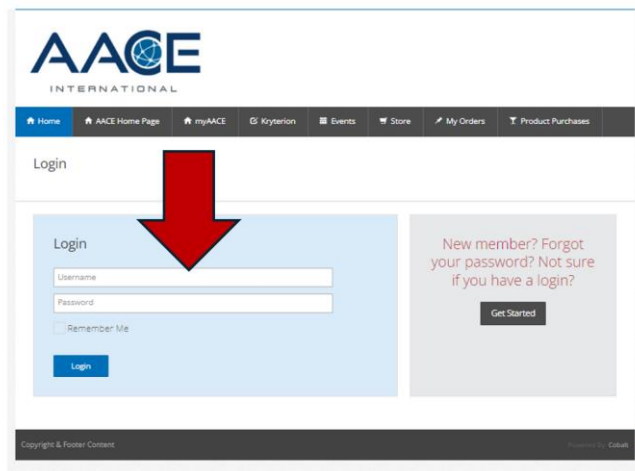
Instructions for your first time logging in:

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.
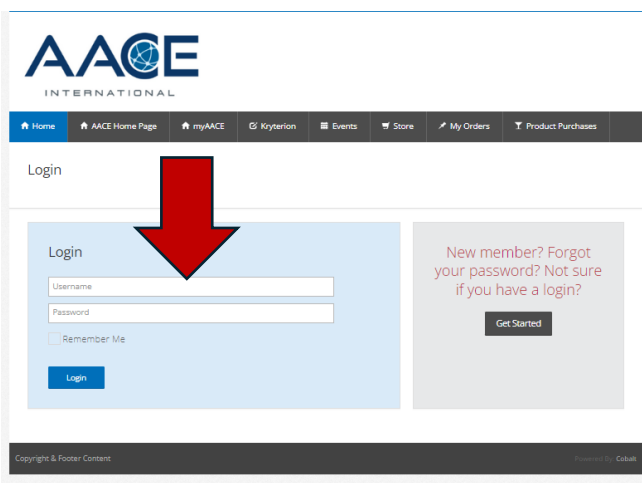
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Instructions for returning users:

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

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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.

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

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Instructions to add new members to your roster:

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

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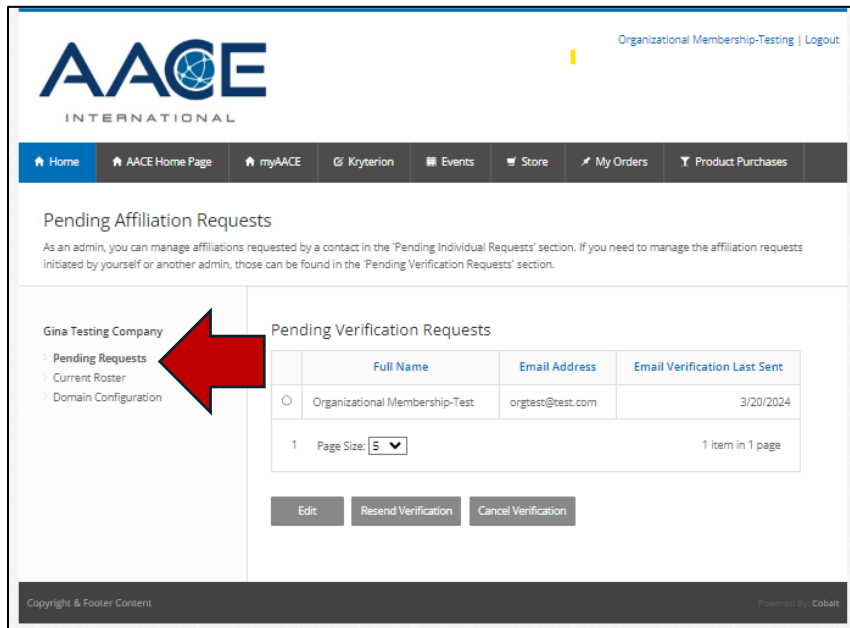
3. The new member will receive an email to verify their profile. If a profile does not exist, they will be prompted to create one and will remain on the pending requests tab. Once they verify and created a profile, they will automatically move to the current roster tab. All members will appear on your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

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4. 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.

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

To Purchase extra roster slots:

1. Click on "Manage Roster" in your organization tile.

2. Click "Current Roster"

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3. Select "Buy More Slots"

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

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

6. Review the total and select "Pay Now":

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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.

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.

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.

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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:

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

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.

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:

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

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

Organizational Demographics is where you will provide information so that we can learn more about your organization to serve you better:
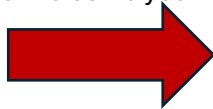
Contact membership@aacei.org if you need additional information or have any questions. We are here to help you through this new system process.

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