



Association Fee Manager

An Online Membership Management & Payment System Using PayPal Or Credit Cards

This overview document will show you the various Administrative Control Panel sections of the AFM

ACCOUNT CONTROL PANEL ADMINISTRATION	3
MAIN ADMINISTRATOR ACCOUNT LANDING PAGE	3
GENERAL GROUP INFORMATION	4
DISPLAY SETTINGS	5
PAYMENT SETTINGS	6
MEMBER REGISTRATION	8
EMAIL ALL MEMBERS INSTANTLY	9
EMAIL REFERENCE & OPTIONS	10
REPORTING	11

To view a sample Group site as viewed by a member please visit our home page

AssociationFeeManager.com

800-768-6024

info@associationfeemanager.com



Association Fee Manager

An Online Membership Management & Payment System Using PayPal Or Credit Cards

Accept All Major Credit Cards Instantly



No Merchant Account Needed

Accept PayPal



Providing online payment options to your membership can help increase timely payments to your group by over 67%.

All payments go directly to your own paypal account instantly

Free fund transfers from your PayPal Account to your bank at any time.

Welcome to the **Association Fee Manager**.

For **less than \$7 a month** the **Association Fee Manager** offers groups, that currently do not provide an **online payment option for their membership** the ability to do so affordably **without the high cost** normally associated in operating and maintaining such a system on their own.

Types of Groups that benefit by using the Association Fee Manager

- Associations
- Professional Groups
- Fraternal Groups
- Neighborhood Clubs
- Booster Clubs
- Sports Organizations
- School Clubs
- College Groups
- University Associations
- Business Groups
- Camps
- Non Profit Groups
- Municipalities
- Religious Groups
- Veteran's Groups
- Any group that wants an online payment and membership management system

The **Association Fee Manager** is a online registration and **fee management service** that gives groups the ability to **offer an online payment option to their membership to pay dues and other fees online**, using either **Paypal** or a Major Credit Card/Debit Card.

No need to create a new PayPal button each time you want to collect fees the **Association Fee Manager** does that for you automatically and allows you to manage your members more effectively - what use to take some a week to do can now be accomplished in a matter of minutes. You can send bills out in an instant to all members at one time. Allowing your members to pay online eliminates returned check issues also. ([See PayPal Question & Answers](#)).

The **Association Fee Manager** is the most **affordable way to accept payments online** without incurring the cost of building & maintaining your own system. The **Association Fee Manager** greatly **reduces a groups transaction costs** because there are no monthly merchant fees.

Because the **Association Fee Manager** is set up so can you use your own **PayPal** account **your association, club or group maintains full control over all funds** collected at all times. The **Association Fee Manager** does not collect your payments you do.

Highlighted Features :

- Customized Financial Reporting
- Membership Accounts
- Email members when payments are due
- Email notification of payments
- Ability to charge a online processing fee in addition to your group fee
- Customize look & feel of your form page.
- Members Directory option
- Up to 10 Fee payment options
- 5 Web Page group site

In less than 5 minutes your group can be **accepting online dues & fee payments**.

- Simple to setup
- Easy to manage
- Easy for members to use
- Convenient for members to pay
- Affordable for your group - less than \$7 a month

© Copyright 2005 - 2010 Association Fee Manager



Account Control Panel Administration

The following screen shots will show you from an administrator stand point the controls and financial reporting provided within the Association Fee Manager system.

Main Administrator Account landing page

Every time you login as the Group Administrator (Admin) you will see this screen. This screen will list all feature updates as they happen thereby keeping you informed at all times of system features as they occur.

The main admin menu is always displayed in the left hand column for easy and intuitive access to all areas of the Admin control panel.

Association Fee Manager Account Manager Control Panel

Home | Open a PayPal Account | Ask Us A Question | Logout

Your Group Name

Welcome back!

Association Fee Manager Features Update Notices:

Date	Topic	Message
8/21/10 8:22:43 A	# 1 - Welcome	Welcome to the Association Fee Manager. If there are any updates or important features added you will see them displayed here when you login each time.

AFM Home/Updates

Group Information

Site Display Settings

Payment Settings ▶

Edit Pages ▶

Members ▶

Email ▶

Reports ▶

Misc Settings ▶

Support



General Group Information

Within each section of the Admin Control Panel the right hand column will display field explanations or information and links for you to use or give out to your members.

Information entered here is displayed on various pages within your group site and can be update at any time.

The screenshot shows the 'Association Fee Manager' Admin Control Panel. On the left is a navigation menu with options: AFM Home/Updates, Group Information, Site Display Settings, Payment Settings, Edit Pages, Members, Email, Reports, Misc Settings, and Support. The main area is titled 'General Group Information' and contains a form with the following fields:

- Current Subscription Plan: Monthly - \$12.50
- Group Id #: 1011
- Group Name: Your Group Name
- Address: 3990 Main Street
- City: Your Town
- ST: Massachusetts
- Zip: 02030
- Country: United States
- Contact: Bruce Springstein
- Email: info@associationfeemanager.com
- Phone: 800-768-6024
- FAX: 888-450-5533
- Group Main Website: associationfeemanager.com
- President: [Empty field]
- Vice President: [Empty field]
- Treasurer: [Empty field]
- Secretary: [Empty field]
- Other Board Members: [Empty text area]
- Board Group Photo: Choose File no file selected

At the bottom right of the form is an 'Update record' button. On the far right, a yellow box contains the following information:

General Group Information:
Group Address is used for Mailing of Fees Purposes unless set in the Payment Settings area.

Your Site Links:
This is your sites home link to give to members:
<http://associationfeemanager.com/group.php?assoc id=1011>
This is the link to use for members to register:
http://associationfeemanager.com/group_member_reg.php?assoc id=1011
This link can be copied and pasted into an email and sent to members to use.



Display Settings

This section allows you to set how your group's site will look and what main sections will be available to members.

Certain types of information will not be available unless a member has logged in – no member information is displayed unless a member is logged in. This allows you to let non-members register and view important information on your group.

Display Settings

Members Directory Active: Yes No

Design Template:

Show Home Menu: Yes No

Show About Us Menu: Yes No

Show Board Menu: Yes No

Show Documents Menu: Yes No

Show Email Menu: Yes No

PayPal Checkout Logo: no file selected

Custom Header Image: no file selected
samplegoupheader.jpg

Current Template:
(If Template images does not update click the update button again)

Dark Blue

Display Settings Explained

Member Directory
This is as it says a directory of your members that other members can view - not the general public. A member would have to be login in order to see it. Members do have the ability to upload a photo and write a short piece if they choose.
Members may also send email to other members from within the directory but they can not see other members email address.

Design Template
You have several Design templates you can select from. The designs affect 2 main elements on your Page in the top header of the pages design. The actual Header image used and the Menu Bar color.
If you upload a custom header image the default design of the Header Image and the Group name will not appear but the Menu bar will remain the color of the Template design you have chosen.

Show Menu
The Show Menu options give you the ability to turn Menu & Pages off and on within the Group and Registration pages.

PayPal Checkout Log
You can upload a logo or small header image that will appear at the top of the PayPal checkout area. This helps to instill confidence with members in that they are dealing with you group. Image can be a peg, jpg or png file - it must be no larger than 200 x 75 pixels, and is resized to this upon upload. This may or may not display depending on how PayPal feels that day - sorry.

Custom Header Image
You have the ability to upload a custom header image - if one is not upload the standard template header is shown with your groups name showing at the top.
Image is resized to 900 x 100 pixels when uploaded so keep it as close to this size as possible., it should be less than 1.5 megs in size and the file format acceptable is Jpeg, jpg or png. Make sure to include your groups name

© Copyright 2005 - 2010 Association Fee Manager

Within the Display settings you can upload a custom header image to further customize your groups site look and feel.

Upload a custom logo that will display on your own PayPal payment page too.



Payment Settings

The Association Fee Manager provides our group with more payment flexibility than it most likely will need. All payments are processed through your groups PayPal account and the Association Fee Manager never collects any money for your group. The Association Fee Manager will automatically set up the correct PayPal button needed for your members to use when paying, quick, easy and simple.

As you can see from the screen shot below Groups have up to 10 different payment options they are able to offer members in addition to the ability of offering flexible payment plans on a Monthly – Quarterly or Annual basis. Groups can also elect to pass the transaction cost to their members as a convenience fee at the click of one button. Depending on how much money you collect it is also possible to have a lower processing charge and the Association Fee Manager allows you to adjust the processing charge at anytime.

Groups are also able to accept any payment using 3 different methods – Online – Mail – Delivered, AFM provides all payment instructions and a live google map for hand deliveries.

Home | Open a PayPal Account | Ask Us A Question | Logout

Account Manager Control Panel

Your Group Name

AFM Home/Updates

Group Information

Site Display Settings

Payment Settings

Edit Pages

Members

Email

Reports

Misc Settings

Support

Payment Settings

Registration Open: Yes No

Payment Type: Single Payment Recurring Subscription

Payment Term: One Time (Subscription Only) Annual Monthly

Online Payments Only: Yes No

Add processing fee to payments(online only): Yes No

Call the Processing Fee: On-Line Processing

Paypal Email Address: info@internetcprocessing.com

PayPal Country account is in: United States

Currency Sign/Symbol: U.S. Dollar - United States

Current PayPal Processing Rate: 0.029 (Basic Rate =.029)

PayPal Per Transaction Fee: 0.30 (Basic=.30)

Allow Office Payments: Yes No

Allow Mail in Payments: Yes No

Checks payable to: The Group Check

Mail Checks to Main Office: Yes No

Mail Address: 24 Station Street

Mail City: Hingham

Mail ST: Massachusetts

Mail Zip: 02043

Mail Country: United States

Fee Information	Price	Fee Title	Show
Fee 1 Price:	10.00	Test Fee	<input checked="" type="radio"/> Yes <input type="radio"/> No
Fee 2 Price:	20.00	Test 2	<input type="radio"/> Yes <input checked="" type="radio"/> No
Fee 3 Price:	30.00	Test 3	<input type="radio"/> Yes <input checked="" type="radio"/> No
Fee 4 Price:	40.00	Test 4	<input type="radio"/> Yes <input checked="" type="radio"/> No
Fee 5 Price:	50.00	Test 5	<input type="radio"/> Yes <input checked="" type="radio"/> No
Fee 6 Price:	60.00	Test 6	<input type="radio"/> Yes <input checked="" type="radio"/> No
Fee 7 Price:	70.00	Test 7	<input type="radio"/> Yes <input checked="" type="radio"/> No
Fee 8 Price:	80.00	Test 8	<input type="radio"/> Yes <input checked="" type="radio"/> Yes
Fee 9 Price:	90.00	Test 9	<input type="radio"/> Yes <input checked="" type="radio"/> No
Fee 10 Price:	100.00	Test 10	<input type="radio"/> Yes <input checked="" type="radio"/> No

Update record

Payment Settings Explained

Registration Open

If set to **NO** then no Fee payment information will show. Members may still register though. If you are not ready to accept payments here yet but would like to have your members register first before Fees become due then check **NO**. You will be able to email all members and ask them to login into their accounts and make payments at a later date.

Payment Type

If set to **Single Payment** then Fee 1 is set to 1 and be must set to show, you may add other Fee options that your members can select different quantities for but the final payment is a one time payment only.

If set to **Recurring Subscription** then Fee will be paid automatically based on the Payment Term setting of either Annually or Monthly.

IMPORTANT: You can not mix payment Terms fee payments are 1 type or the other. This is a global Fee setting.

Payment Term

This is used only if you have set the Payment Type to Subscription. This sets the frequency of the subscription payments - either once a year **Annually** or **Monthly**. Fee is paid on same date each year or month. This is a global Fee setting. It is not recommend that you use Recurring Subscription setting with the Multiple ticket option.

Online Payments Only

If set to **YES** then no other payments option except online payments will be displayed regardless of how the other payment options are set.

Add Processing Fee Option

Select **YES** if you want to add the 2.9% +.30 per transaction fee paypal charges to your fee being charged. This means that the member paying online will absorb the transaction cost and not your group.

Call Processing Fee

If nothing is entered in the field the addition of the



Custom Page Content & Instructions

With the Association Fee Manager you have the ability to add your own custom instructions or notes, as needed using the built-in HTML editor giving you the ability to style your messages very similar to a how a typical word processor operates.

All the pages listed in the drop down menu shown use the built-in HTML Editor.

The screenshot displays the Association Fee Manager interface. On the left is a navigation menu with buttons for: AFM Home/Updates, Group Information, Site Display Settings, Payment Settings (with a right arrow), Edit Pages (with a right arrow), Members (with a right arrow), Email (with a right arrow), Reports (with a right arrow), Misc Settings (with a right arrow), and Support. The main area is titled 'Registration Instructions' and features a 'Jump to Page' dropdown menu with options: Select Page (checked), Home Page, About Us, Board, Documents, Email, Payment, Registration, and ReNewal. To the right of the dropdown is an 'Update Message' button. Below the dropdown is a rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, text color, background color, bulleted list, numbered list, link, unlink, and size. The editor contains the following text: 'This is a Sample Group we have set up to allow you to see what a typical association or group area would look like and some of the capabilities please feel free to register all data is removed nightly.' and 'Once registered and logged in you will be able to view account related information'. At the bottom of the editor is another 'Update Message' button. On the right side of the interface, a yellow-highlighted box titled 'Registration Instructions' contains the text: 'The Registrations Instructions will appear in the left column below the AFM standard instructions on the new Account Form used by members when they first create an account with your group.' and 'If left blank nothing will appear except AFM standard instructions'.



Member Registration

The member registration portion of the Account Control Panel provides all the flexibility needed to manage your membership. Records can be filtered or searched in virtually anyway you may need and provides a quick glance ability to review fees that may still be outstanding.

Member accounts can be set to active or non-active yet will still allow an inactive member the ability to login and self-active their accounts again after their fee payments have been made.

Included in the Members list is a quick email link to allow you to email any member individually.

AFM Home/Updates

Group Information

Site Display Settings

Payment Settings ▶

Edit Pages ▶

Members ▶

Email ▶

Reports ▶

Misc Settings ▶

Support

Member Registrations - 1 to 4 of 4

edit delete 1 add new

<< < > >>

[Show all records](#) [Reset filter](#)

No.	Acct #	Status	Reg Date	Fee	First	Last ▲	Address	City	ST	Zip	Cntry	Phone	Email
<input type="checkbox"/>	10014	In-Active	9/30/10	Due	Billy	Cole	2 Canton Str...	Hingham	MA	02030	USA	800-768-6024	info...
<input type="checkbox"/>	10028	Active	10/8/10	Due	Howard	Fine	Stooges Lane	Los Angeles	CA	20003	USA	800-768-6024	hotm...
<input type="checkbox"/>	10033	Active	11/8/10	Due	Samuel	Jackson	905 Tucker L...	Your Town	AL	02030	USA	800-768-6024	info...
<input type="checkbox"/>	10013	Active	9/1/10	Paid	John	Member	2 Canton Str...	Hingham	MA	02030	USA	800-768-6024	supp...

<< < > >>

edit delete 1 add new



Email All Members Instantly

The built-in email function allows you send broadcast email messages at any time and include attachments such as forms or images. Member Accounts will also list all email messages sent by your group to provide a historical record of information sent to members for future reference.

Account Message To All Registered Members
This message appears when the member logs into their account in the right column

Account Message
The account Message will appear on all members account page when they login in the right hand column.
The width of the Message editor is roughly the size of the right column as it dispalys in the Members account page.
We recommend that you create a 1 cell table to better control the width of the message area on the page.
This message will stay until you either change it or clear it by just updating a blank message.
This is good to use for special announcements, important event reminders etc...

Navigation Menu:

- AFM Home/Updates
- Group Information
- Site Display Settings
- Payment Settings
- Edit Pages
- Members**
- Email
- Reports
- Misc Settings
- Support

Message Editor Content:

Email all members instantly and they will also see this in their member account area once they log in.



Email Reference & Options

All emails your group sends out are stored - including the attachments sent for historical reference purposes.

Email Messages Sent - 1 to 4 of 4

No.	Date Sent	Email type	Email from	Subject	Attachment		
<input type="checkbox"/>	1	10/9/10 8:43:12 A	Fee Due	info@internetccproce...	[j]o]op]p]ip	calling.doc	<input type="button" value="View"/> <input type="button" value="delete"/>
<input type="checkbox"/>	2	10/9/10 6:45:37 A	Fee Due	info@internetccproce...	test	School stay away rev...	<input type="button" value="View"/> <input type="button" value="delete"/>
<input type="checkbox"/>	3	10/8/10 1:08:51 P	In-Actives	info@internetccproce...	test inactive email		<input type="button" value="View"/> <input type="button" value="delete"/>
<input type="checkbox"/>	4	10/8/10 1:06:38 P	Actives	info@internetccproce...	Test inactive email		<input type="button" value="View"/> <input type="button" value="delete"/>

- Email Subjects
- Email Received
- Emails Sent**
- Email All Active Members
- Email Members with Fees Due
- Email All Inactive Members

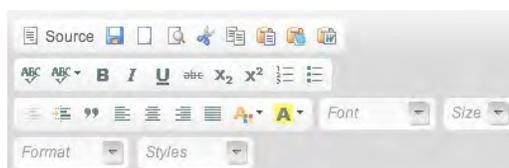
The Associated Fee Manager quickly allows you to send emails to specific members Groups have the ability to customize the Email subjects user can select for email they are submitting used in the Email Contact form used on the group site.

You can also determine in which order the customized Email Subjects will appear.

Email Subjects General Email Subjects - 1 to 2 of 2

No.	Email Subject	Active	Order	
<input type="checkbox"/>	1	Membership Inquiry	Yes	▼ <input type="button" value="edit"/> <input type="button" value="delete"/>
<input type="checkbox"/>	2	Membership Fees	Yes	▲ <input type="button" value="edit"/> <input type="button" value="delete"/>

Email messages are created using the built-in HTML editor giving groups full control over the styling of messages.





Reporting

The Association Fee Manager Reporting is simple yet powerful and fully customizable on the fly.

Transactions - 1 to 7 of 7

Transaction Report As Of Monday, November 15, 2010 At 11:51 Am

Navigation: << < > >>

Show all records Reset filter

Search Transactions

No.	Date	Invoice #	Account #	First	Last	Status	Month	Quarter	Half Year	Year	How Paid	Sub Total	Process	Total	
1	10/18/10 8:27:57 A	46	10013	John	Member	Due	October	Fourth	Second Half	2010	Online	0.00	0.00	10.00	View
2	10/15/10 10:04:47 A	45	10013	John	Member	Due	October	Fourth	Second Half	2010	Online	0.00	0.00	90.00	View
3	10/1/10 2:59:30 P	44	10013	John	Member	Due	October	Fourth	Second Half	2010	Online	0.00	0.00	50.00	View
4	9/28/10 3:00:32 P	43	10013	John	Member	Paid	September	Third	Second Half	2010	Mailed	0.00	5.00	130.00	View
5	9/26/10 6:32:32 P	42	10013	John	Member	Due	September	Third	Second Half	2010	Delivered	0.00	0.00	10.00	View
6	9/26/10 11:33:07 A	41	10013	John	Member	Due	September	Third	Second Half	2010	Online	0.00	0.00	10.00	View
7	9/16/10 1:42:29 P	37	10013	John	Member	Due	September	Third	Second Half	2010	Online	0.00	0.00	10.00	View
8												0.00	5.00	310.00	

Navigation: << < > >>

Transaction Report As Of Monday, November 15, 2010 At 11:51 Am

Customize reports simply by setting the filter on any column heading desired. Filtered report totals will then show.

