What Does the MA Portal Offer

The Fonteva platform is a membership software built on salesforce. It offers online collaborative tools, searchable member directory and helps you to set goals based on real-time data. The items below are things you as the MA can do in working within the system.

- One License per MA (WEF budgets to cover the cost of one license)
- MA can only see their MA membership information
- A Dashboard provides current membership numbers by category in real-time
- Reports - Twelve specific reports have been created for MA use 24/7.
  - Reports Offered:
    - Address Change
    - All Contacts (members)
    - Company Data Transfer Report
    - Expired Member
    - MA Rebate by Date
    - Member Licenses
    - Member Roster
    - My Case
    - New Member
    - Subscriptions by Type
    - UPP Members
    - WEF Committee Report
  - Reports are not customizable
  - Filter options are available
- Cases - MA’s can easily communicate with the WEF Customer Service Team. Creating a case will offer the MA the ability to:
  - Address edits related to a member record, or other matter
  - Cases are directly sent to the WEF Customer Service Center Team to be resolved
  - The MA will be able to:
    - View cases submitted
    - Track resolution
    - Chat with the WEF Customer Service Team on matters related to a specific case.
- Member Lookup – MA’s can “use” the Member Tab – from the Home page navigation bar – to find a list of MA Members. They can search by category, name, company etc...
- The MA can create a new contact and process payment (check, credit card, EFT)
- The MA is able to print out payment receipt in a PDF format and send a receipt to the member
- Membership information is provided in real-time. The refresh button provides a constant refresh option.

GLOSSARY OF TERMS

- **Contact** = Individual customer (member)
- **Account** = Organization / company
- **Case** = user is able to open a message that goes to the WEF customer service team that can be tracked for resolution and will be part of the historical communication within the system.
- **ROE** = Rapid Order Entry allows the user to process transaction on behalf of the customer / member in the backend quickly and easily.
Logging into the MA Portal

Login to https://connect.wef.org/MA/s provided using username and password you created for this system. After successful logging in, you will see the home page below at the top menu of your screen.

HOME PAGE

The Home page houses your dashboard. At the top left, next to the WEF logo, you can click tabs to view your Members, Access Reports, dig deeper into your dashboard and view Cases.

DASHBOARD

The Dashboard is on your Home Page. Here you will find a pie chart of your current membership in real time by type and a list of your top 10 active memberships by category and membership numbers. Notice to the right side some quick links provide access to external WEF communities (WEFCOM) and resources MA Resource Center. It allows you quick access without relogging in with credentials. Also, clicking on the refresh tab recalculates the dashboard to reflect changes in real-time.
The View Report (Subscriptions by type) located under the pie chart allows you to view details of all membership categories and the individual members within each category. **Click on any part of the pie chart** to dig deeper within a particular membership category. Ex: click on the Professional Operator (166 members) and it takes you to the following page that provides all members within the operator category. Here you see their name (with a link into their member record), and their start and end date.
CONTACT SUPPORT

Below the dashboard is the **Contact Support**. Here you will find all cases you have opened and sent to the WEF Customer Service Team about a specific member of your MA i.e., let WEF know of a change to a member’s contact information, membership etc... It provides the case number, subject, who created the case, the MA name and the date/time case was submitted.

If you click on **Recently Viewed**, you can sort as shown below by: my cases, recently viewed, and recently viewed cases.

**CREATE A NEW CASE REPORT**

If you have edits to a member record or problems within the system, creating a new case report offers you the ability to communicate directly with WEF’s Customer Service Team. Once a case is created, both you and WEF will be able to track case responses, and sort for historical information.

To open a new report, click on the blue bar (Contact Support) located below the dashboard and it will take you to the page below. A new case could be a follow-up question or comment in which you would
fill in the Subject and Description or it could be related to edits to a member’s record i.e., name, address, email, phone etc... so you can search and select the member name, fill in the subject and brief description of what needs to be done. Then click Confirm (blue button).

It will create a case number sent directly to the WEF Customer Service Team. Cases are listed on the dashboard page under Contact Report. The case report has a DETAILS tab and a RELATED tab. The DETAILS tab shows the request...and what you need done. You can also use the Questions section located on the right side of the page to further communicate with the WEF Customer Service Team on additional comments, status etc...
The **RELATED** tab allows you to add a file or photo/image. This can be very helpful to assist the WEF Customer Service Team in processing the request.

By using the case submission system, you and WEF can better track requests efficiently. It will also work nicely for attaching a spreadsheet providing large number of changes. We hope it will be a feature you will find useful and take advantage of. You can also access your cases on the Home page by clicking the Case tab at the top of the page.

**MEMBER TAB**

On the home page (dashboard), go to the top bar and click on the **Member tab**. This is another way to view all your members. You can sort by name, account number, phone, email, title or you can use the search option to locate a member using their full name, first name or last name. You can also do a global search (the search option is located on the top bar to the right of the Case tab). This allows you the ability to look for a specific person, case, recent view etc...
The MA Portal – All Contacts lists all members associated with your MA. Clicking on the arrow by the MA Portal – All Contacts additionally offers two other search options (Recently Viewed (Pinned) and Recently Viewed Individual Contacts as shown below.

When in a member record, you can open a new case. Click on Request Change to notify WEF’s Customer Service Team that something within this member’s record needs specific editing. The Request Change is located at the top right of the page next to create a sales order as shown below.
When you click on **Request Change**, you will be asked to fill in the name and description of what needs to be edited. Another avenue to quick access in communicating with WEF on necessary edits. Click save and a new case will be created. You and WEF will get notification.

**REPORT**

The Report tab will show you all Reports, Folders and Favorites you have access to. **The system defaults to the reports you use most often.** If you don’t see your report, then click on the All reports option in the left menu. See image below.

**List of Reports Offered:**
Address change; All Contacts; Company Data Transfer Report; Expired Members; MA Rebate by Date; Member Licenses; Member Roster; My Cases; New Members; Subscriptions by Type; UPP Members; and WEF Committee Report
You can select the **All Reports** to see the full list. See image below.

For example: Select the **MA Rebate Report**. This automatically provides you the rebates owed to the MA for the current month. You have the ability to **filter** by all receipts and filter by posted date as shown below i.e., current FY or previous FY.
Notice the Export tab on the upper right corner allows you to export your reports in an excel or csv format. You will be responsible for running all your reports to include your rebate report (WEF will no longer send these out monthly as the system provides this for you).

CREATE A NEW MEMBER RECORD
Go the Home Page and click on Member. Then click on the New button on the top right side of the page.

It takes you to a form that will need to be fill out. It is important to fill out as much information as possible that you have for the member and note there are a few required fields to fill out in order to process the membership. The click Save.
You will then see your new contact has been added into the system. On this contact’s page, under DETAILS, you will see the information filled out however if you click on the RELATED tab, there is nothing listed. Once the membership payment is processed, then the RELATED tab will show data on this new contact/member. Click on the Rapid Order Entry at the top right side of the page to process membership payment. It will take you to the sales order page as shown below. Here you will see the name of the contact is automatically filled in. The Business group will always be WEF.

In the **Item Quick Add Field**, type in membership category. As you type, membership options will appear. Click on the specific membership.
You are provided two options – Select Annual Membership or Auto Renew (Auto Renew means you must provide a credit card on file in order to participate in the auto renew option). Select your option and click the Add to Order button.

Within a minute, you will see the Items: Free has not calculate the cost of WEF portion of the membership as $140.00.

Click on the arrow next to the Professional Membership to add in the Member Association membership.
A list of MAs are provided. Scroll to select the MA membership for this member’s record.

The MA fee is added to the order, recalculating to a final cost of $195.00 as shown below.
Now click the Process Payment Go button underneath the fee. You will be redirected to a payment page. From the Payment Section, select the type of payment (Check, Credit Card, EFT etc.).

In the upper right side of the page, click on Apply Payment. It will direct you to a form to fill out the credit card payment. Click Process Payment.
You can see all details processed along with you can select to view the receipt of send receipt. In the upper right side of the page, click on the arrow next to Clone. Here you can select to view the receipt of click on customer receipt...see below.

Below is the customer receipt. You can download it as a PDF, print it out, or send PDF in an email.
<table>
<thead>
<tr>
<th>QUANTITY</th>
<th>LINE DESCRIPTION</th>
<th>LIST PRICE</th>
<th>SALE PRICE</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Professional Membership</td>
<td>USD 143.00</td>
<td>USD 140.00</td>
<td>USD 140.00</td>
</tr>
</tbody>
</table>

SUBTOTAL: USD 140.00

TOTAL: USD 140.00