# 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
  - o 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:
  - o Address edits related to a member record, or other matter
  - o 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.

# wef. Member Association

## 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.

Report: Subscriptions Subscriptions by Type				Q 🕑 🔻 🔿 C <sup>4</sup> Ex
		16	56	Professional Operator Membership
Membership Type 🕇 💌	Contact 💌 1	Term Start Date 💌	Term End Date 💌	
Membership Type 🕈 💌 Professional Operator Membership (166)		Term Start Date 💌 2/1/2020	Term End Date 💌 1/31/2021	
	Daniel Alan Slomers	2/1/2020	1/31/2021	
	Daniel Alan Slomers August A Belmont	2/1/2020 8/1/2020	1/31/2021 7/31/2021	
	Daniel Alan Slomers August A Belmont Joseph E Stammers	2/1/2020 8/1/2020 3/1/2020	1/31/2021 7/31/2021 2/28/2021	
	Daniel Alan Slomers August A Belmont Joseph E Stammers Peter Dorney	2/1/2020 8/1/2020 3/1/2020 12/1/2020	1/31/2021 7/31/2021 2/28/2021 11/30/2021	

#### **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.

						Contact Su	pport						
R	nses ecently Viewed pdated 7 minutes ago	•							Q Search	h th	is list	¢	•
	Case Numb 🗸	Subject	~ 5	status 🔨	/	Individual Name 🗸	Account Name	~	Date/Time Opened	$\sim$	Case Owner Alias	$\sim$	
1	00001282	Change Contact Information Request	N	New		Susan Boynton	Pennsylvania Water Environment Assoc		1/11/2021 2:16 PM		Customer Service Queue		
2	00001281	I would like the Phone number to be upda	٢	New		Susan Boynton	Pennsylvania Water Environment Assoc		1/11/2021 2:09 PM		Customer Service Queue		V
3	00001274	Change Contact Information Request	٢	New		Susan Boynton	Pennsylvania Water Environment Assoc		1/7/2021 2:14 PM		Customer Service Queue		V
4	00001273	This is my test Case	٢	New		Susan Boynton	Pennsylvania Water Environment Assoc		1/7/2021 2:07 PM		Customer Service Queue		T
5	00001232	I'm Having trouble seeing my cases	N	New		Susan Boynton	Pennsylvania WEA		11/23/2020 2:20 PM		FON HelpQueue		-

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

Contact Support  Cases  Recently Viewed   Sitems LIST VIEWS  My MA Cases  Recent Account Name					
Sitems					
My MA Cases		Q Search	n this list	\$	- C
	↓ Date/Time Op	oened 🗸	Case Owner Alias	$\sim$	
1 Recently Viewed Pennsylvania Water Environment A	Assoc 1/11/2021 2:16	PM	Customer Service Queue		•
2 Recently Viewed Cases Pennsylvania Water Environment A	Assoc 1/11/2021 2:09	PM	Customer Service Queue		•
3 00001274 Change Contact Information Request New Susan Boynton Pennsylvania Water Environment A	Assoc 1/7/2021 2:14 F	РМ	Customer Service Queue		•
4 00001273 This is my test Case New Susan Boynton Pennsylvania Water Environment A	Assoc 1/7/2021 2:07	PM	Customer Service Queue		•
5 00001232 I'm Having trouble seeing my cases New Susan Boynton Pennsylvania WEA	11/23/2020 2:2	20 PM	FON_HelpQueue		•

#### **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).

Note Environment Members Reports Dashboards Case	Q Search	🌲 sboyntonpa 🔻
	New Case	
Individual Name		
Search Individual Contacts		Q
*Status		
New		<b>▼</b> 4
Subject		
Description		
		li
	Confirm	

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...

Case 00001282					+	Follow Printable View
Subject Change Contact Information Request	Priority Medium	Status New	Individual Name Susan Boynton	Individual Phone (717) 642-9500	Case Origin Community Portal	
DETAILS RELATED					Question	
Case Owner Customer Service Queue		Individual Phone (717) 642-9500			What would you like to know?	Ask
Case Number 00001282		Individual Email sboynton@pwe	a.org.test		↑↓ - Q Search this feed	▼ • C <sup>4</sup>
Individual Name Susan Boynton					sboyntonpa (Customer) updated this record. January 11, 2021 at 2:16 PM	V
Account Name Pennsylvania Water Environment Assoc					Case Owner Susan Boynton to Customer Service Queue	
Membership Status					🔓 Like 🕐 Comment	
Case Currency USD - U.S. Dollar					Write a comment	
Case Source						

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.

						î↓ ▼ Q. Search this feed ♥ ▼ C
Interaction	History (0)					sboyntonpa (Customer) updated this record.
🖌 Case Comm	nents (0)			N	ew	Case Owner Susan Boynton to Customer Service Queue
Case Histor	ry (4)					🐞 Like 🌑 Comment
Date	Field	User	Original Value	New Value		Write a comment
1/11/2021 2:16 PM	Created.	Susan Boynton	0		•	
1/11/2021 2:16 PM	Individual Name	Susan Boynton	Alan Veliky	Susan Boynton		sboyntonpa (Customer) created this case.
1/11/2021 2:16 PM	Case Owner	Susan Boynton	Susan Boynton	FON_HelpQueue	•	
1/11/2021 2:16 PM	Case Owner	Susan Boynton	FON_HelpQueue	Customer Service Qu		00001282
				v	iew All	View more details
C Attachmen	ts (0)			Upload F	iles	🔟 Like 🌑 Comment
		1 Upload I	iles			Write a comment
		Or drop fil	es			

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...

TREMS - SUILEU OF ACCOUNT REINE + FILERED OF AII INDIVIDUEL ODIRACE - 5 MA ARIBIDATE - Optieted a rein seconds ago	v Pri C <sup>1</sup>	intable V	
Name       Account Name 1       Account Name 1       Phone       Email       Title       I         1       Amy E Perry       Abbottstown Paradise Joint Sewer Auth       (717) 259-9120       aperry@apisa.com.test       I         2       Robert S Leber       Abington Wwp       (215) 234-1803       rsleber@verizon.net.test       I         3       George R Wrigley       Abington Wwp       (215) 884-8329       gwrigley@abington.org.test       I         4       Ruth Patrick       Academy of Natural Sciences of Philadelphia       (215) 299-1098       I       I         5       Harold P Neff       Advanced Fluid Systems Intl Inc       (570) 327-1711       Imothry.dean@aecom.com.test       Area Water Sector Lead		ľ	T
1     Amy E Perry     Abbottstown Paradise Joint Sewer Auth     (717) 259-9120     aperry@apisa.com.test       2     Robert S Leber     Abington Wwp     (215) 234-1803     rsleber@verizon.net.test       3     George R Wrigley     Abington Wwp     (215) 884-8329     gwrigley@abington.org.test       4     Ruth Patrick     Academy of Natural Sciences of Philadelphia     (215) 239-1098       5     Harold P Neff     Advanced Fluid Systems Intl Inc     (570) 327-1711       6     Timothy C Dean     AECOM     (724) 602-1909     timothy.dean@aecom.com.test	Indiv 🔨		<u> </u>
2     Robert S Leber     Abington Wwp     (215) 234-1803     rsleber@verizon.net.test       3     George R Wrigley     Abington Wwp     (215) 884-8329     gwrigley@abington.org.test       4     Ruth Patrick     Academy of Natural Sciences of Philadelphia     (215) 299-1098       5     Harold P Neff     Advanced Fluid Systems Intl Inc     (570) 327-171       6     Timothy C Dean     AECOM     (724) 602-1909     timothy.dean@aecom.com.test     Area Water Sector Lead		~	
3     George R Wrigley     Abington Wwp     (215) 884-8329     gwrigley@abington.org.test       4     Ruth Patrick     Academy of Natural Sciences of Philadelphia     (215) 299-1098       5     Harold P Neff     Advanced Fluid Systems Intl Inc     (570) 327-1711       6     Timothy C Dean     AECOM     (724) 602-1909     timothy.dean@aecom.com.test     Area Water Sector Lead			î
4     Ruth Patrick     Academy of Natural Sciences of Philadelphia     (215) 299-1098       5     Harold P Neff     Advanced Fluid Systems Intl Inc     (570) 327-1711       6     Timothy C Dean     AECOM     (724) 602-1909     timothy.dean@aecom.com.test     Area Water Sector Lead		▼	
5     Harold P Neff     Advanced Fluid Systems Intl Inc     (570) 327-1711       6     Timothy C Dean     AECOM     (724) 602-1909     timothy dean@aecom.com.test     Area Water Sector Lead		•	
6 Timothy C Dean AECOM (724) 602-1909 timothy.dean@aecom.com.test Area Water Sector Lead		▼	
			j –
7 Mary Elizabeth Miller AECOM (484) 274-3517 meosekewicz@amail.com.test		▼	
		•	
8 Haluk Bafrali Aerisa (412) 735-0565 hbafrali@aerisa.com.test Director of Sales and Marketing		▼	<u></u>
9 Karen M Manci Ag Engineering (614) 292-4505 mancl.1@osu.edu.test		•	<u>,</u>

**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.

Water E Fede	wkonment Home <u>Membe</u> atom Antonev	e <u>rs</u> Reports Dashboards Case				Q Search	ŧ	sboyntonpa 🔻
50+ ite	Individual Contacts MA Portal - All Conta LIST VIEWS	cts 🔻 🖈				Q Search this list		intable View
	<ul> <li>MA Portal - All Contac</li> </ul>	ts			· · · · · · · · · · · · · · · · · · ·	Title	✓ Indiv ✓	
1	Recently Viewed (Pinn	ned list)			Dapjsa.com.test			•
2	Recently Viewed Indiv	vidual Contacts			@verizon.net.test			
3	George R Wrigley	Abington Wwp	(215) 884-8329	gwrigle	y@abington.org.test			•
4	Ruth Patrick	Academy of Natural Sciences of Philadelphia	(215) 299-1098					
5	Harold P Neff	Advanced Fluid Systems Intl Inc	(570) 327-1711					•
6	Timothy C Dean	AECOM	(724) 602-1909	timoth	y.dean@aecom.com.test	Area Water Sector Lead		•
7	Mary Elizabeth Miller	AECOM	(484) 274-3517	mepasi	kewicz@gmail.com.test			
8	Haluk Bafrali	Aerisa	(412) 735-0565	hbafral	i@aerisa.com.test	Director of Sales and Marketing		•
9	Karen M Mancl	Ag Engineering	(614) 292-4505	mancl.1	@osu.edu.test			•
10	John D Findley	Alcosan	(412) 734-8730	john.fin	idley@alcosan.org.test			

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.

	Members Reports	Dashboards	Case			Q Search	h		🌲 sboyntonpa
Individual Conta Amy E Perr						+ Follow	Rapid Order Entry	Create Sales Order	Request Change
Flag Contact	Address Status	Account Nan Abbottstow	ne n Paradise Joint Sewer Auth	Title	Phone (2) 💌 (717) 259-9120	Email apen	l ry@apjsa.com.test		
DETAILS RE	LATED					î	Q Search this feed		₹ • C'
Suffix			Is MA Affiliated						
Name			Member ID () 2000290909						21
Amy E Perry							<u> </u>	~	

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.

Home Members Reports Dashbe	ards Case	Q, Search	🌲 sboyntonpa 👻
Individual Contact		<u>×</u>	
Amy E Perry	Request Change	er Entry Create Sales	Order Request Change
Flag Contact Address Status Acc	Individual Name Amy E Perry	st	
DETAILS RELATED	*Status New Subject	• this feed	<b>▼</b> - C'
suffix	Change Contact Information Request Description		
Name Amy E Perry			
Maiden Name			
MA Membership Type		Cancel Save	
State Code PA			

#### 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

Federation Home	Members <u>Reports</u> Dashboards Case			Q	Search	🌲 sboyntonpa
Reports						
Recent 11 items				Q Search r	recent reports 🕸 🔻	
REPORTS	Report Name	Description V	Folder	Created By	Created On V Subscribed	1
Recent	Subscriptions by Type		MA Community Report	Fonteva Admin	12/15/2020, 9:17 AM	
Created by Me Private Reports	WEF Committee Roster		MA Community Report	Fonteva Admin	10/13/2020, 12:31 PM	
All Reports	Company Data Transfer Report		MA Community Report	Fonteva Admin	11/30/2020, 9:30 AM	
FOLDERS	Contact Data Transfer		MA Community Report	Fonteva Admin	12/15/2020, 9:32 AM	
All Folders	MA Rebate by Date		MA Community Report	Fonteva Admin	8/3/2020, 5:21 PM	
Created by Me Shared with Me	UPP Members		MA Community Report	Fonteva Admin	12/10/2020, 11:58 AM	
FAVORITES	Address Change		MA Community Report	Fonteva Admin	12/10/2020, 12:09 PM	

You can select the **All Reports** to see the full list. See image below.

Water Environment Pederation Notice Lab your Home	Members Reports Dashboards Case		Q Search	🔔 sboyntonpa 🔻
Reports All Reports 13 items			Q Search all reports	
REPORTS	Report Name	Description V Folder	Created By Created On V Subscribed	
Recent	Address Change	MA Community Rep	port Fonteva Admin 12/10/2020, 12:09 PM	
Created by Me Private Reports	All Contacts	All contacts associated with the MA MA Community Rep	oort Fonteva Admin 11/19/2020, 3:48 PM	-
All Reports	Company Data Transfer Report	MA Community Rep	port Fonteva Admin 11/30/2020, 9:30 AM	
FOLDERS	Contact Data Transfer	MA Community Rep	port Fonteva Admin 12/15/2020, 9:32 AM	
All Folders Created by Me	Expired Members	MA Community Rep	port Fonteva Admin 12/30/2020, 8:01 AM	
Shared with Me	MA Rebate by Date	MA Community Rep	oort Fonteva Admin 8/3/2020, 5:21 PM	
FAVORITES	Member Licenses	MA Community Rep	port Fonteva Admin 10/13/2020, 12:29 PM	_
All Favorites	4			

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.

hede	independent ration castorer Home Members	Reports D	Dashboards Ca	ase		Q Searc	h		🌲 sboyntonpa
1	Report: Receipts with Re MA Rebate by Da	ceipt Lines <b>te</b>					Q 🗞 Add	Chart 🔽 🗖	C <sup>4</sup> Export
то 6	tal Records Total Total USD 275.00					Filter by Posted Date	×	Filters Show Me	$\rightarrow$
	Membership Number ↓ 💌	First Name 💌	Last Name 🔻	WEF Membership Type 💌	Membership Start D	Posted Date	•	All receipts	
1	2000433116	Lucia	Guerrero	Professional Membership	1/	Range	,	Posted Date Current CY (Jan 1, 2)	021 - Dec 31,
2	2000432829	Kara	Smith-Leon	Professional Membership	1/	Current CY	• P	2021)	
3	2000432026	Sally	Kirk	Professional Membership	1/	All Time		Is MA Affiliated equals True	
4	2000432025	Alice	Perez	Professional Membership	1/			equais frue	
5	2000431622	Lebron	James	Professional Membership	1/	Custom	þ		
6	2000428997	test upp portal	cp	Professional Membership	1/1	I/2 Fiscal Year	US		
7						Current FY	SD 2		

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.

While Brownest Home Members Reports Dashboards Case Q search									Search				L sb	oynton	npa 🔻
	ndividual Contacts <b>VA Portal - All Co</b> i	ntact	ts 🔻 🖈								N	ew	Printa	ible Vie	w
50+ items • Sorted by Account Name • Filtered by All in				Upda	ated a few seconds	ago		Q	Search this list	\$ ·	•	C		¢	Ŧ
	Name	$\sim$	Account Name 1	$\sim$	Phone	~	Email	$\sim$	Title		$\sim$	Indiv	~		
1	Amy E Perry		Abbottstown Paradise Joint Sewer Auth		(717) 259-9120		aperry@apjsa.com.test							•	^
2	Robert S Leber		Abington Wwp		(215) 234-1803		rsleber@verizon.net.test							•	1
															-11

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**.

Warter Groe	eonmoid Home <u>Memb</u>	<u>ers</u> Reports Dashboards Case	Q Search	×	🌲 sboyntonpa 👻
	Individual Contacts	New Ind	vidual Contact: Fonteva General Contact		
19	MA Portal - All Co	st of common academic, honorary, professional, and enerational suffixes.			New Printable View
0+ item	s + sortes by Account Ivan	×	Member ID	<u>\$</u>	
	Amy E Perry	Acc Suff> ONone	Member D	~	Indiv V
2	Robert S Leber	* Name Abi Salutation	* Individual Currency		
	George R Wrigley	Abr -None	USD - U.S. Dollar	•	•
à	Ruth Patrick	First Name			
5	Harold P Neff	Adv. Middle Name			*
6	Timothy C Dean	AEC			v
	Mary Elizabeth Miller	AEC *Last Name			*
8	Haluk Bafrali	Aer		-	
9	Karen M Mand	Ag	Cancel	Save & New Save	•
		Alcount	Process International Control Control		-

You will then see your new contact has been added into the system. Yon 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.

Water Environment Federation The water caulity propert							Susan Boynton +
Sales Order #000419883	Exit						
Customer (Entity)				Business Group			
1 Alice Perez	0	•		WEF	•		
tem Quick Add						source code	Items: Free

In the **Item Quick Add Field**, type in membership category. As you type, membership options will appear. Click on the specific membership.

Water Environment Federation					Charle.	dente de la constante de la co
ome Reports Individual Contacto						
Sales Order <b>#00041988</b> 3	DO:					
Gammer (Frig)			Burnet Grap			
▲ Alice Peres	0		WEP	40		
tem Quick Add						Items: Free
Professio	.e.				9	Process Payment
Professional Membership Subscription						
Professional Operator Membership Tubechplane						
Global Professional Versional p tutersplaye		Copyrght 8 2000-2021 salestiess cor	n ne All rothe searcail 1955aoc3206mart GeourthSia	dement   Terms.of.Upo		
Noung Professionals Membership (1st Ter Solid-typices	onð					
Naune Professionals Montherstein Cled Te	and the					

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.

Water Environme Federation					Search	Search Susan Boynton -
me Reports Individual Contact						
ales Order <b>#00041</b> 9	9883 Exit					
Customer (Entity)			Business Group			
Alice Perez	0		WEF			
tem Quick Add		Auto-Renew Annual Membership		source code		Items: Free
Professional Membership		✓ Annual Membership	Add to Order		Q. Sugar	Process Payment

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

Sales Order #000419883 Exit			
Customar (Unity)  A Alice Perez	Businets Group WEF 4		
tem Quick Add		source code	Items: USD 140.00 Process Payment C

Click on the arrow next to the Professional Membership to add in the Member Association membership.

Federation the water quality people ome Reports Individual Conta							Search	Susan Boynton
Sales Order <b>#0004</b> 3	19883 Exit							
Customer (Entity)				Business Group				
& Alice Perez	0			WEF	•			
tem Quick Add		a former				source code	۰.	Items: USD 140.00 Process Payment
<ul> <li>Professional M Start date: 1/1/2021 - E</li> </ul>	embership nd date: 12/31/2021							USD 140.00 Includes 1 required package item
* Subscriber		* Salact Plan		Pytoe Bule	Sale Price			USD 140.00
Alice Perez	0	Annual Membership	•	Annual Membership - USD 140.00	USD 140.00			
Optional Package I	tems							USD 0.00
Optional Package I		QUANTITY		PRICE RULE				USD 0.00
				DEFALUT - STAS				

A list of MAs are provided. Scroll to select the MA membership for this member's record.

Virginia WEA	DEFAULT - \$45.00	
Texas Water Utility Assn	DEFAULT - \$50.00	
South Dakota WEA	DEFAUX - 515.00 Override Price	
Rocky Mountain WEA (CO, NM, WY)	DEFAULT - 535.00	
Quebec - Reseau Environment	DEFAUXT - 530.00 Override Price	
Puerto Rico W&EA	DEFAULT - \$50.00	
Pennsylvania WEA	DEFAULT - 555.00 Override Price	
Pacific Northwest CWA (ID, OR, WA)	DEFAULT - 570.00 Override Price	
Oklahoma WEA	DEFAULT - \$50.00 Override Price	
Ohio WEA	DEFAULT - \$50.00	
North Dakota WEA	DEFAULT - \$20.00 Override Price	
North Carolina WEA	DEFAULT - \$100.00	
New York WEA	DEFAULT - \$125.00 Override Price	

The MA fee is added to the order, recalculating to a final cost of \$195.00 as shown below.

Water Environment Federation' the water quality people'							Search_	Search Susan Boynton -
me Reports Individual Contacts								
ales Order <b>#00041988</b>	3 Exit							
Customer (Entity)			Busin	ess Group				
Alice Perez	0		WE	F	+			
tem Quick Add						source code		Items: USD 195.00
							۹	Process Payment 💲
<ul> <li>Professional Memb Start date: 1/1/2021 - End date</li> </ul>	ership 12/31/2021							USD 195.00
*Subscriber		*Select Plan	Price Rule		Sale Price		•	USD 140.00
Alice Perez	0	Annual Membership	Annual Membership - USD 140	.00	USD 140.00			050 140.00
Optional Package Items								USD 55.00

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..).

Customer Information	n Available Credi	0					Credit Applie	
Alice Perez	× USD 0.00						USD 0.00	USD 195.0
Payment Section	* Reference Number O		Deposit Account			Posted Date Ø		
Vorment Type  Contract Check Offline - Check Offline - Credit Card Offline - EFT	Herenerice Number G	Batch O	Q 00-10013-0000000 - CAPITAL ONE OPERA	ATING ÷	Pagment Date 0 01/07/2021	01/07/2021		
Offline - Account Credit Offline - Other Drisk Cerd ECheck	applied to all orders, individual	I orders, or individual line ite	ms per orders.				Override O Credit Applied O	Payment <b>0</b>
✓ ORDER #	✓ түре	✓ ITEMS			✓ DUE DATE	BALANCE DUE	✓ CURRENT DUE ✓ CREDIT /	APPLIED V PAYMENT
< 000419883	Sales Order	Professional Membe	ership , Pennsylvania WEA , Water Environment & Techn	ology		\$195.00	\$195.00 \$0.00	\$195.00
Aema							Balance Due	USD 195.00
							Payment	(USD 195.00)

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**.

		Apply Payment			
unterment Trillermation ment Content & Section 1 and B Trillermat & USD 0.00	Credit Card	USD 195.00		Court Applied USD 0.00	
ayment Section week face @ Televera Televera Televera (D. Televera) weak face _ Q. (CC 100	*Card Holder Name Alice Pare *Card Number		ланы Пик ( <b>В</b> ) 51/07/3523	_	
Inder Information unge Cells and percent opport to all antise, animalizationers, an estimation for ensure per outer.	* Exp Month Please Select	*Exp Year - Please Select -		Territor () ( Levis Argenta ())	
	Would you like to save this pr	yment method for future use?			
	Billing Address				
	+ New Address			Balarou Dae	

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.

0000376394				
DETAILS		τ <sub>6</sub> -		Q. Create Refund Process Refund
Contact® Alice Perse	Is Payments			View Document Customer Ruceigt
Account® Penz (Mice) Household	1s Refund			
EntityO	Business Group			
Type 0 Payment	Business Group Name® WEF		AL A	
Date 0 1/7/2021	Payment Gateway® WEB Test		A A	
Contact ID 2000432025	Source Coder		4	
Customer Reference Number	Batch		-	
Is Voided	Deposit Account 05-10011-0000000 - CAPITAL ONE OFERATIVES			
Currency	Action Information			

Below is the customer reciept. You can download it as a PDF, print it out, or send PDF in an email.

Water Environment Federation 601 Wythe St Alexandria, Vrignia 22314 United States (703) 684-2400		Water Environment Federation the water quality people*			
THANK YOU!					
Receipt Header Date Receipt Number Customer Total	1/7/2021 0000378394 Alice Perez USD 195:00				
QUANTITY	LINE DESCRIPTION	LIST PRICE	SALE PRICE	TOTAL	
1	Professional Membership	USD 140.00	USD 140.00	USD 140.00	
		SU	BTOTAL:	USD 195.00	
			TOTAL:	USD 195.00	