Aptify Chapter Management Guide

Version 5.0

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Table of Contents

Chapter 1—Aptify Chapter Management

Introduction....1
Configuring Chapter Management....1
Chapter Assignment Rules....3

Aptify Chapter Management

Introduction

This guide provides an overview of Aptify's Chapter Management application which allows an organization's Chapter administrators manage chapters, members and meeting from the E-Business Website.

This chapter covers the following topics:

- Configuring Chapter Management: This section provides an overview of how to configure Chapter Management so that it is visible on an E-Business Web site.
- Chapter Assignment Rules: This section provides an overview of how to assign a person to an appropriate chapter based on rules defined for an organization.

> The Chapter Management application is added to Aptify when you install Aptify E-Business 5.0. See the *Aptify 5.0 E-Business Installation Guide* for more instructions.

Configuring Chapter Management

Follow these steps to configure Chapter Management so Chapter information is visible on an E-Business Web site:

1. Create a Companies record for the Chapter. (A Chapter is tracked using a Companies record.)
2. Create a Subscription Product for the Chapter membership (in the Products service).
3. Create a Chapter Membership Products record (found under the Chapter Management application) that ties the Chapter's Companies and Products records together.
4. Create Chapter Role Types (typically for Chapter officers) that describe what type of access a particular role has to the Chapter information available on-line (e.g., add members, edit members, etc.).
5. Create Chapter Roles records that assign a Chapter Role Type to a Person and links to the Chapter's Companies record.
6. Add the Chapter Management Web Module to one or more Web Groups.
7. Assign Web Users who will manage Chapter information on-line to a Web Group that provides access to the Chapter Management Web Module. The Persons records for these Web Users should have corresponding Chapter Roles records.

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- When a Web User adds members to Chapters over E-Business, the system generates $0 Orders for the Chapter Membership Product. If your organization charges members for chapter memberships, you should create orders for the Chapter Membership Product rather than add members from the E-Business site's Chapter Management pages. See "Chapter Assignment Rules" on page 3 for a discussion of how to automatically assign members to a chapter when placing an order for a Chapter Membership Product.

See the *Aptify E-Business Developer Guide* for more information on Web Modules, Web Groups, and E-Business page security.

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Chapter Assignment Rules

The Chapter Management application includes functionality that allows an organization to define rules that automatically assign a person to an appropriate local chapter when he or she orders a membership product. The Chapter Assignment Rules service in the Chapter Management application stores the set of possible rules to apply. Each rule corresponds to a Database Objects record in Aptify that provides the necessary logic (such as, “find the nearest chapter based on the ZIP Code of the order's Ship To Person”).

For each Membership product to which a local chapter membership applies, a user specifies the appropriate rule on the Products record. Then, the system automatically executes the rule and populates the Chapter field on the Order Lines record when a user adds the product to an order or a Web User places an order on line for the product.

The following is an overview of how an organization can use Chapter Assignment Rules to automatically assign new members to the appropriate local chapter:

1. An administrator adds a new Company Types record named Chapter.
    - This is required to use the Closest Chapter rule provided by Aptify.
    - The Company Types service is in the Administration - CRM application by default.
2. The organization creates or updates the Companies records for the available chapters to use the Chapter Company Type.
    - Each Chapter should have a Companies record in Aptify.
3. An administrator or developer creates one or more Chapter Assignment Rules that specify the logic for automatically assigning a person to the appropriate chapter when placing an order.
    - The Chapter Assignment Rules service is in the Chapter Management application.
    - Each Chapter Assignment Rules record specifies the name of a Database Objects record that contains the assignment logic.
    - An administrator or developer writes a stored procedure that defines the rule's logic. This stored procedure must be added as a Database Objects record in Aptify, and the object's name should then be specified in the corresponding Chapter Assignment Rules record.
    - Chapter Management 4.5 includes one Chapter Assignment Rule called *Closest Chapter*. This rule uses a stored procedure to perform a postal code proximity search to find the chapter closest to a person or company. The stored procedure identifies the chapters by using a CompanyType= ‘Chapter’ filter.

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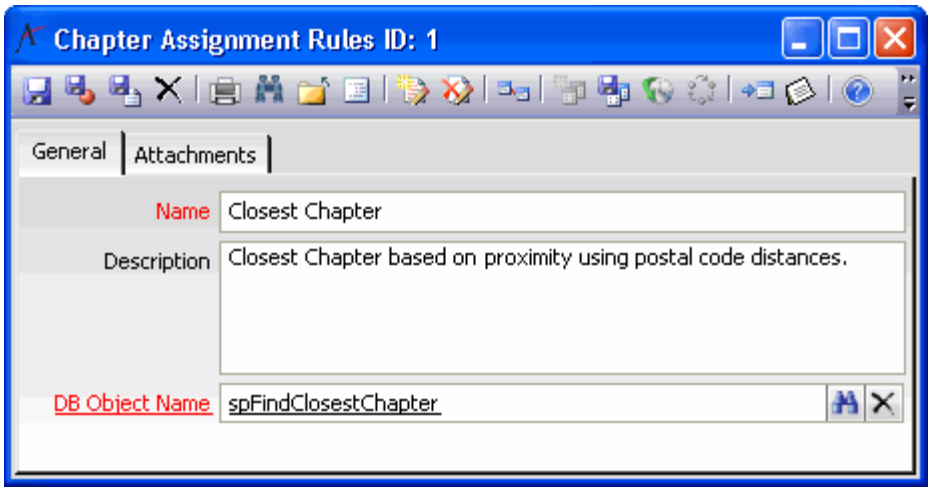
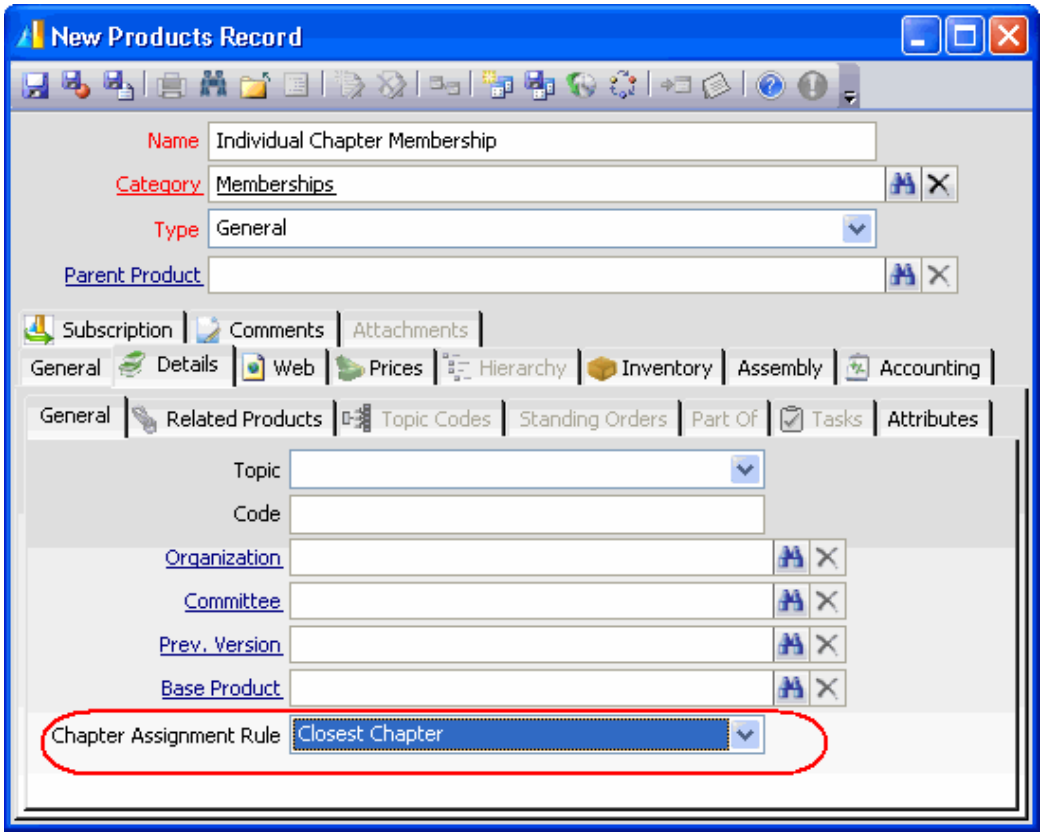
Figure 1 Chapter Assignment Rule



4. A user selects the applicable **Chapter Assignment Rule** for a particular product on the Products record's *General* > *Details* tab.

    - Chapter assignments are generally applicable to membership and subscription products, but a chapter can also be affiliated with other products as well.

Figure 2 Specifying a Chapter Assignment Rule



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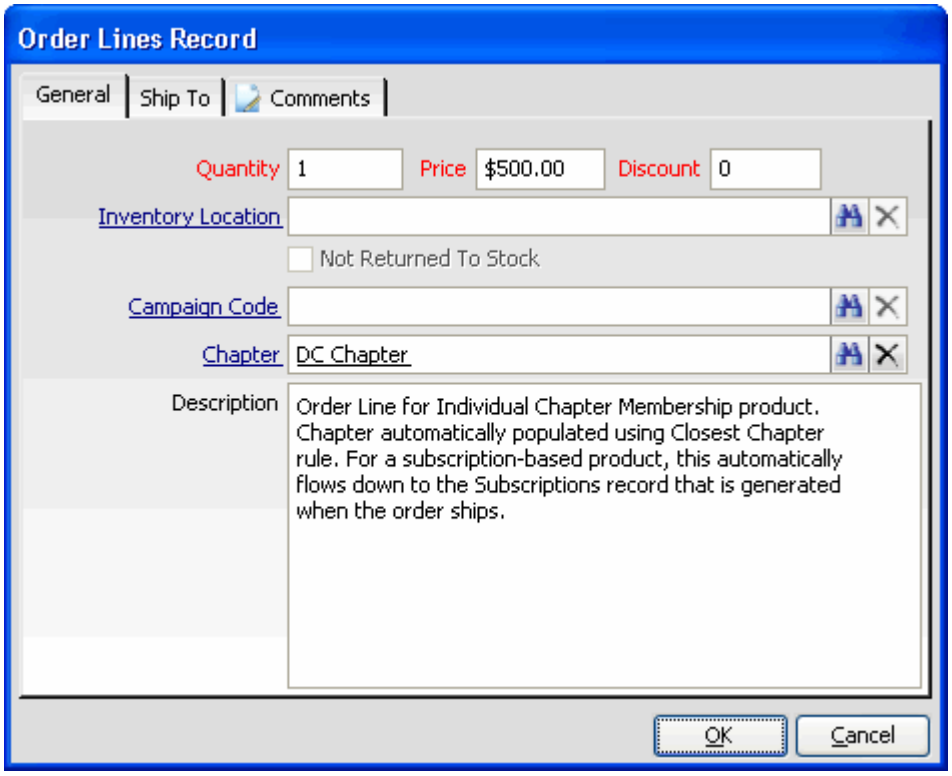
5. When this product is added to an order (either within Aptify or over the E-Business Web site), Aptify automatically populates the **Chapter** field on the product's Order Lines record using the logic in the Chapter Assignment Rule to identify the appropriate chapter.
    - For subscription-based products, this Chapter assignment also flows down to the Subscriptions record that is generated when the order ships.

Figure 3 Chapter Assignment



6. For a subscription-based product, when a Chapter administrator views the membership information on the E-Business Web site, all of the people who were automatically assigned to the Chapter via the Chapter Assignment Rule appear as Chapter Members.

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Index

C

Chapter Assignment Rules 3
Configuring Chapter Management 1

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