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# **Aptify Chapter Management Guide**

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# 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 website.
- [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. See the *Aptify 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 website:

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.

- 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.

# Chapter Assignment Rules

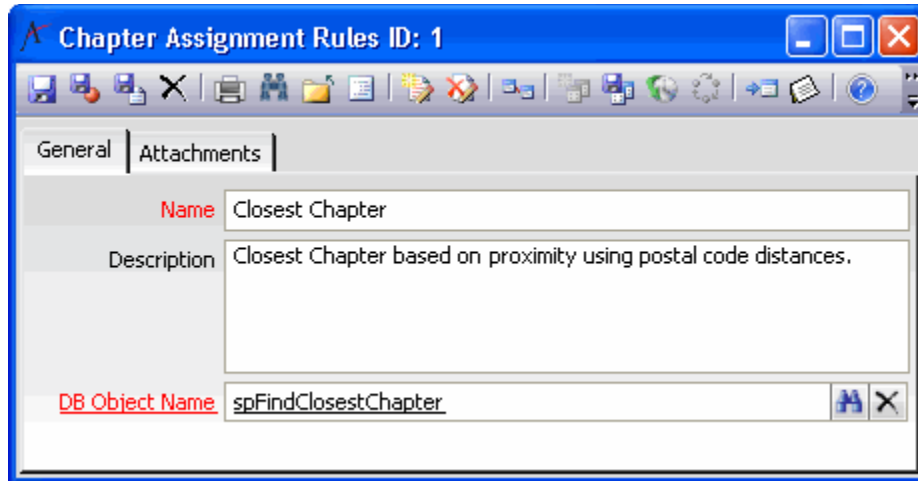
The Chapter Management application includes functionality that allows an organization to define rules that automatically assign a person to an appropriate local chapter when he or she orders a membership product. The Chapter Assignment Rules service in the Chapter Management application stores the set 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:

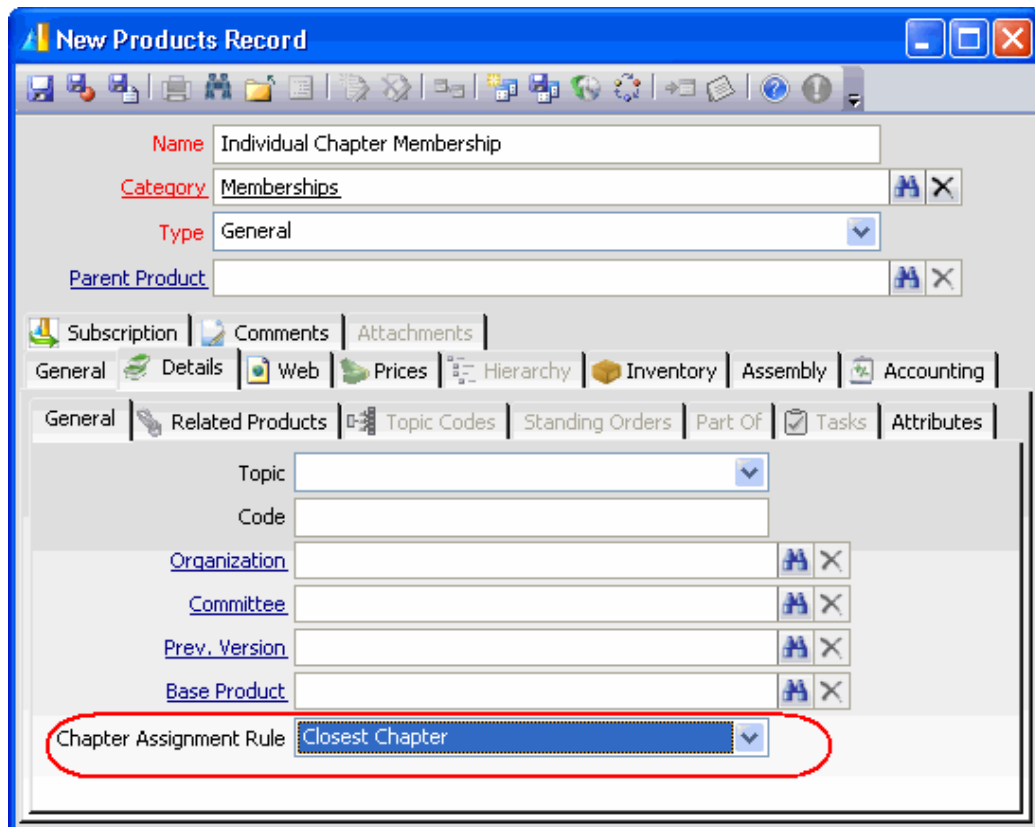
1. An administrator adds a new Company Types record named Chapter.
  - This is required to use the Closest Chapter rule provided by Aptify.
  - The Company Types service is in the Administration - CRM application by default.
2. The organization creates or updates the Companies records for the available 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 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.

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



5. When this product is added to an order (either within Aptify or over the e-Business website), 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

**Order Lines Record**

General | Ship To | Comments

Quantity: 1 Price: \$500.00 Discount: 0

Inventory Location: [ ]

Not Returned To Stock

Campaign Code: [ ]

Chapter: DC Chapter

Description: Order Line for Individual Chapter Membership product. Chapter automatically populated using Closest Chapter rule. For a subscription-based product, this automatically flows down to the Subscriptions record that is generated when the order ships.

OK Cancel

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



### Introduction

This appendix provides field-by-field information on every form used in Chapter Management. This appendix is intended for use as a reference guide for the various fields on any advertising management form.

The Chapter Forms appendix documents the forms in alphabetical order. Within each form, tabs are also addressed in alphabetical order.

Note that the fields marked as “required” in this chapter are required at the entity level. In some cases, a required field may already have a default value so a user does not need to specify a value for these fields before saving the record. To review the list of fields required at the entity level, open the appropriate Service Properties dialog (by right-clicking the service in the Navigation Bar and selecting **Properties**) and click the **Fields** tab.

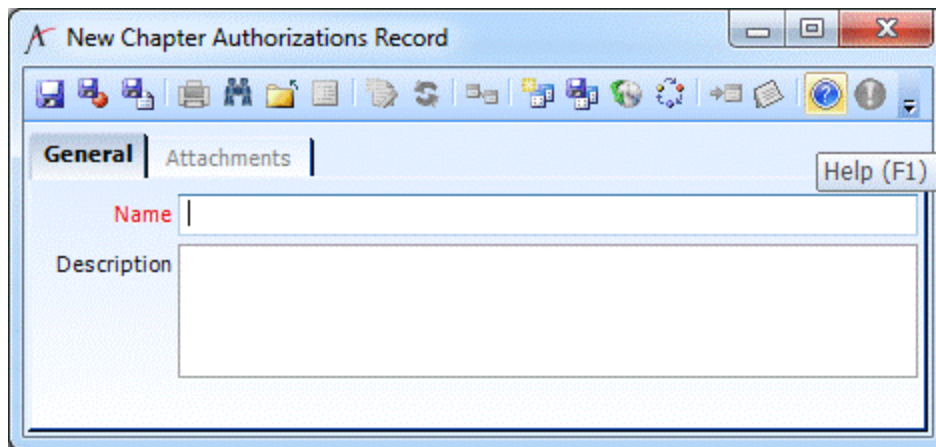
This appendix contains information on the following forms:

- Chapter Authorizations Form
- Chapter Assignment Rules Form
- Chapter Meetings Form
- Chapter Membership Products Form
- Chapter Reports Form
- Chapter Report Categories Form
- Chapter Roles Form
- Chapter Role Types Forms

# Chapter Authorizations Form

**NOTE:** This service is reserved for future use and currently does not control any system functionality.

Figure A.1  
Chapter Authorization Record



The screenshot shows a window titled "New Chapter Authorizations Record". It features a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with various icons. The main content area has two tabs: "General" and "Attachments". The "General" tab is selected and contains two input fields: "Name" (with a red asterisk indicating it is required) and "Description". A "Help (F1)" button is located in the top right corner of the form area.

## Attachments Tab

The Attachments tab list any files relevant to the Chapter Authorizations record.

## General Tab

### Name (required)

The name of the chapter authorization.

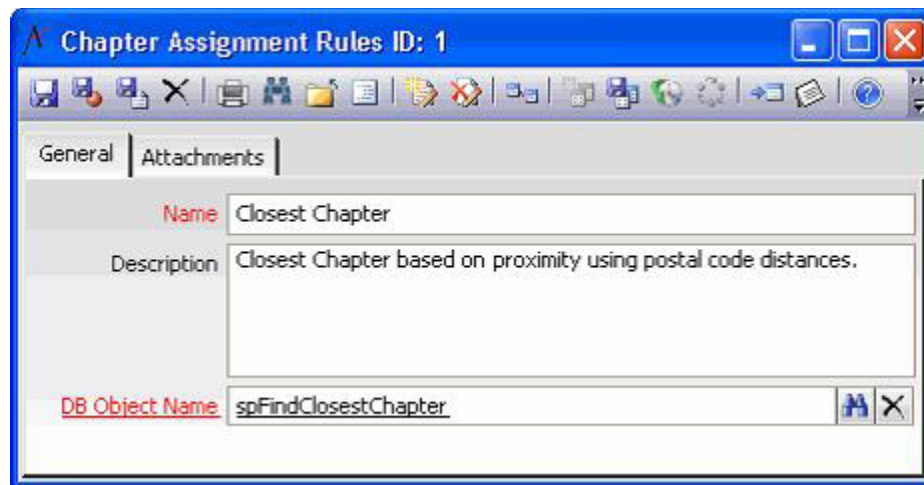
### Description

A description of the chapter authorization.

## Chapter Assignment Rules Form

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 stores the set of possible rules to apply. For each Membership product to which a local chapter membership applies, a user specifies the appropriate rule on the Products record.

Figure A.2  
Chapter  
Assignment  
Rules Record



The screenshot shows a web application window titled "Chapter Assignment Rules ID: 1". The window has a blue title bar and a standard Windows-style toolbar. Below the toolbar, there are two tabs: "General" (selected) and "Attachments". The "General" tab contains three input fields:

- Name:** Closest Chapter
- Description:** Closest Chapter based on proximity using postal code distances.
- DB Object Name:** spFindClosestChapter

### Attachments Tab

The user may attach any files relevant to the chapter assignment rule on the Attachments tab.

### General Tab

#### Name (required)

The name of the chapter rule.

#### Description

The description of the chapter rule.

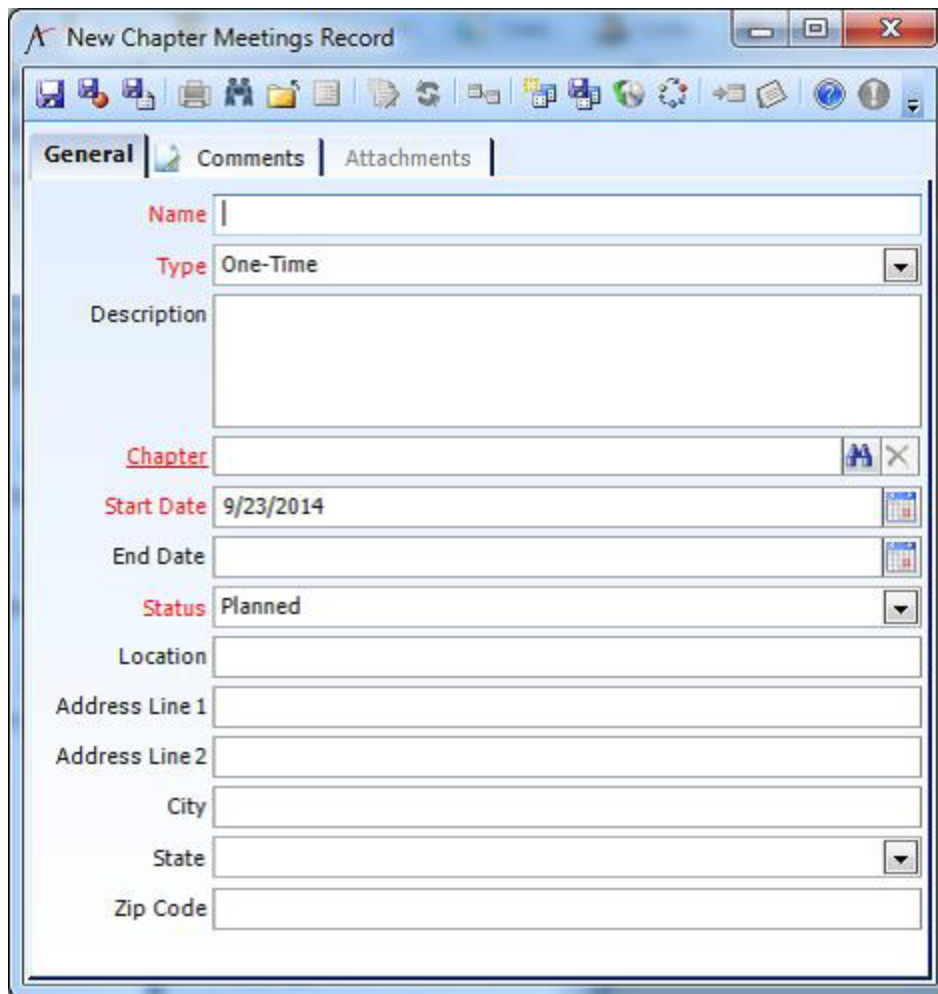
#### DB Object Name (required)

The stored procedure that defines the rule's logic. This field is linked to the Database Objects service.

# Chapter Meetings Form

This service stores information about any chapter meetings or events created by or managed by chapter officers on an e-Business site.

Figure A.3  
Chapter Meetings Record



The screenshot shows a web browser window titled "New Chapter Meetings Record". The browser's address bar and toolbar are visible at the top. The page has three tabs: "General", "Comments", and "Attachments", with "General" selected. The form fields are as follows:

- Name:** A text input field.
- Type:** A dropdown menu with "One-Time" selected.
- Description:** A large text area.
- Chapter:** A lookup field with a magnifying glass icon and a close button.
- Start Date:** A date field showing "9/23/2014" with a calendar icon.
- End Date:** A date field with a calendar icon.
- Status:** A dropdown menu with "Planned" selected.
- Location:** A text input field.
- Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- City:** A text input field.
- State:** A dropdown menu.
- Zip Code:** A text input field.

## Attachments Tab

The user may attach any files relevant to the chapter meeting on the Attachments tab.

## Comments Tab

The Comments tab contains any comments relevant to the Chapter Meetings record.

## General Tab

### **Name (Required)**

The name of the chapter meeting.

### **Type (Required)**

The type of meeting. Default values are One-Time and Recurring.

### **Description**

The description of the meeting.

### **Chapter**

The chapter associated with this meeting. This field links to the Chapters service.

### **Start Date**

The start date of the meeting.

### **End Date**

The end date of the meeting.

### **Status**

The status of the meeting. The default options are Planned, Completed, and Cancelled.

### **Location**

The location of the meeting.

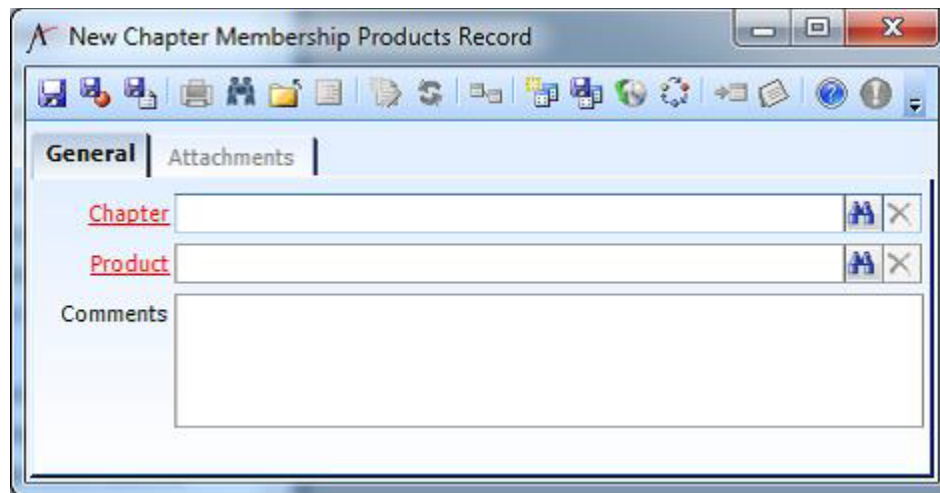
### **Address line 1, Address Lin3 2, City, State, and Zip Code**

Address information for the meeting is stored in the address fields.

# Chapter Membership Products Form

This service links a Chapter's Companies record to the Product that generates the chapter's membership subscriptions.

Figure A.4  
Chapter Mem-  
bership Prod-  
ucts Record



## Attachments Tab

The user may attach any files relevant to the chapter membership product on the Attachments tab.

## General Tab

### Chapter (Required)

The name of the chapter associated with the membership. This field links to the Chapters service.

### Product (Required)

The product in the chapter is associated with. Chapter assignments are generally applicable to membership and subscription products, but a chapter can also be affiliated with other products as well.

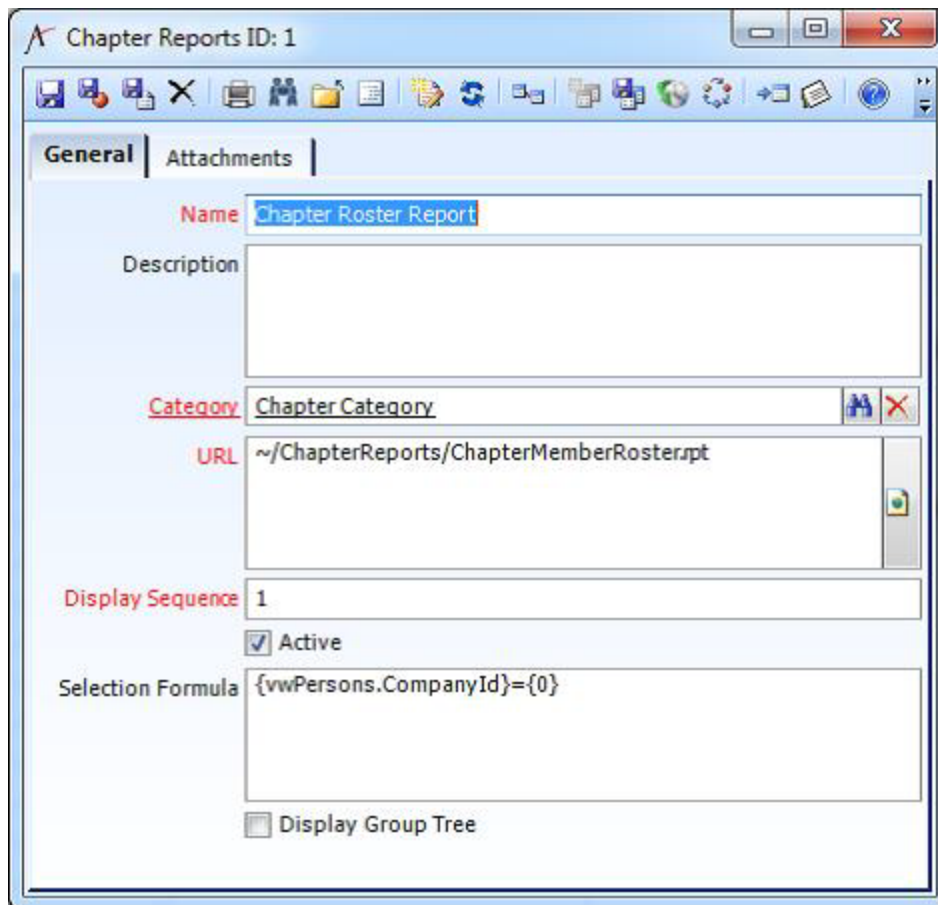
### Comments

Additional information about the chapter product

# Chapter Reports Form

This service stores information about the Crystal Reports that a chapter officer can run from the Chapters area of an e-Business site.

Figure A.5  
Chapter  
Reports  
Record



The screenshot shows a web browser window titled "Chapter Reports ID: 1". The browser's address bar contains the URL "~/ChapterReports/ChapterMemberRoster.rpt". The page has two tabs: "General" (selected) and "Attachments". The "General" tab contains the following fields:

- Name:** Chapter Roster Report
- Description:** (empty text area)
- Category:** Chapter Category
- URL:** ~/ChapterReports/ChapterMemberRoster.rpt
- Display Sequence:** 1
- Active:**
- Selection Formula:** {vwPersons.CompanyId}={0}
- Display Group Tree:**

## Attachments Tab

The Attachments tab lists any files relevant to the Chapter Reports record.

## General Tab

### Name (Required)

The name of the chapter report.

**Description**

The description for the chapter report.

**Category (Required)**

The category for the chapter report. This field links to the Report Categories service.

**URL (Required)**

The location of the chapter report.

**Display Sequence (Required)**

Enter the sequence for chapter reports to be displayed.

**Active (check box)**

Specifies whether or not the report is active. When checked the report is active.

**Selection Formula**

Provides selection information for limiting when the report is displayed. For example, you can specify that the report is only displayed for persons who are not associated with a company.

**Display Group Tree**

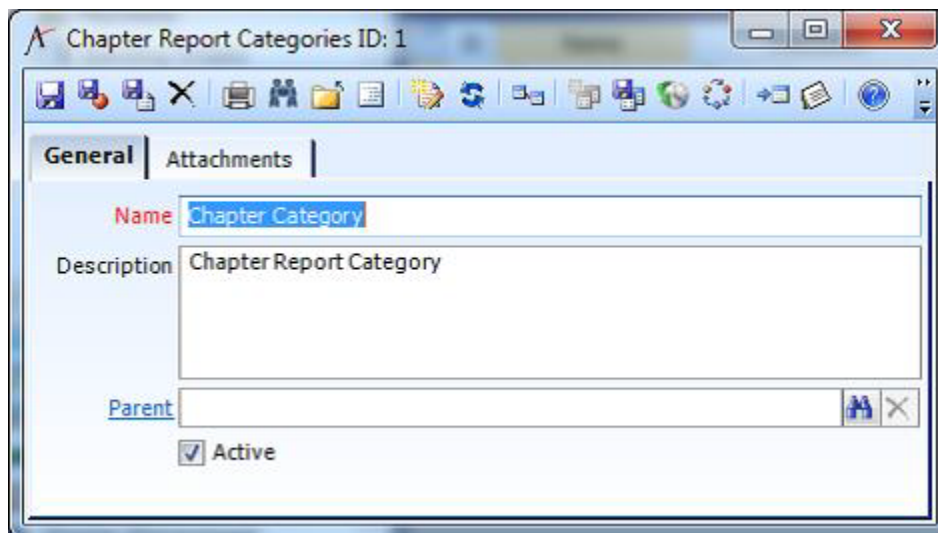
Controls if the group tree is displayed or not.



# Chapter Report Categories Form

This service specifies the categories available to group chapter reports.

Figure A.6  
Chapter  
Report Cate-  
gories Record



The screenshot shows a web browser window titled "Chapter Report Categories ID: 1". The browser's address bar and toolbar are visible. The page has two tabs: "General" (selected) and "Attachments". The "General" tab contains the following fields:

- Name:** A text input field containing "Chapter Category".
- Description:** A text area containing "Chapter Report Category".
- Parent:** A dropdown menu with a search icon and a close icon.
- Active:** A checked checkbox.

## Attachments Tab

The Attachments tab lists any files relevant to the Chapter Report Categories record.

## General Tab

### Name (Required)

The name of the chapter report category.

### Description

The description for this chapter category.

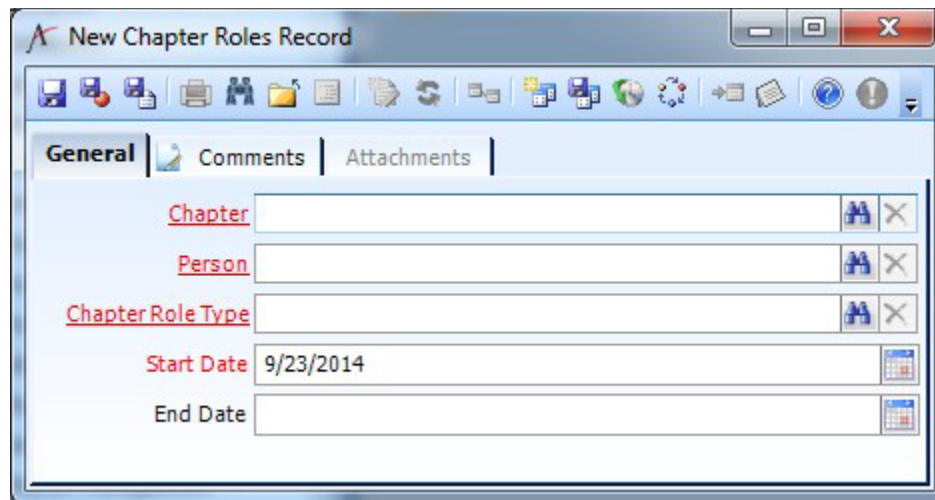
### Parent (Optional)

If you are creating a record for a Chapter report category, specify the top-level category in the Parent field.

# Chapter Roles Form

This service identifies people who can access information related to a specific chapter on the e-Business site.

Figure A.7  
Chapter Roles  
Record



The screenshot shows a web browser window titled "New Chapter Roles Record". The window has a standard toolbar and three tabs: "General", "Comments", and "Attachments". The "General" tab is selected and contains the following fields:

- Chapter**: A text input field with a small icon to its right.
- Person**: A text input field with a small icon to its right.
- Chapter Role Type**: A text input field with a small icon to its right.
- Start Date**: A date input field containing the value "9/23/2014" and a calendar icon to its right.
- End Date**: A date input field with a calendar icon to its right.

## Attachments Tab

The Attachments tab lists any files relevant to the Chapter Report Categories record.

## Comments Tab

Enter any comments relevant to the chapter role on the Comments tab.

## General Tab

### Chapter (Required)

The name of the chapter in which the role is associated with. This field links to the Chapters service.

### Person (Required)

The name of the persons assigned to this role. This field links to the Persons service.

### Chapter Role Type (Required)

The type of role. This field links to the Chapter Role Types service.

**Start Date (Required)**

The start date of chapter role being assigned

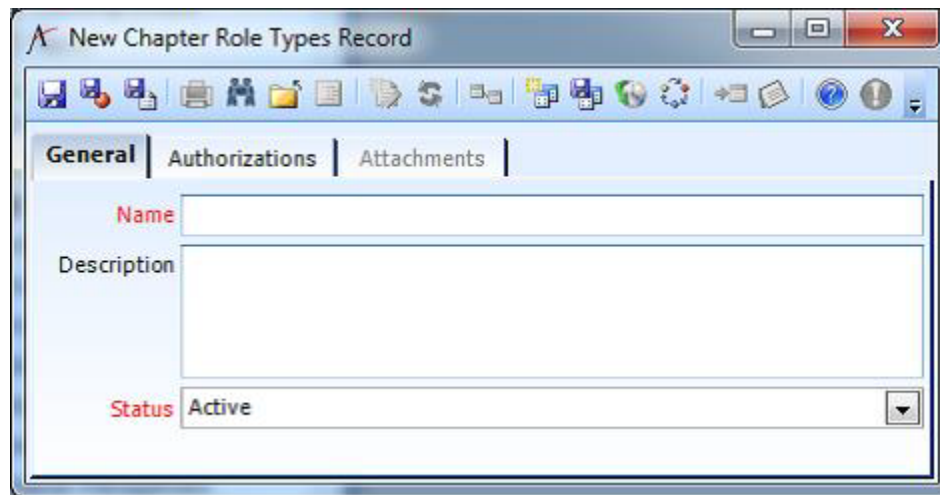
**End Date**

The date in which the chapter role will end.

## Chapter Role Types Forms

This service identifies the possible roles that can be assigned to people who can access information on an e-Business site on behalf of a chapter. **Note that the Authorizations tab is reserved for future use.**

Figure A.8  
Chapter Role  
Types Record



The screenshot shows a web application window titled "New Chapter Role Types Record". It features a standard Windows-style toolbar at the top. Below the toolbar are three tabs: "General", "Authorizations", and "Attachments". The "General" tab is selected and contains the following fields:

- Name:** A text input field.
- Description:** A larger text area.
- Status:** A dropdown menu with "Active" selected.

### Attachments Tab

The Attachments tab lists any files relevant to the Chapter Role Types record.

### Authorizations Tab

You can use this tab to identify what type of actions on behalf of the chapter that a person of this role type would typically perform. **Note that the Authorizations tab is reserved for future use.**

### General Tab of Authorizations Sub-type Records

#### Chapter Authorization (Required)

The name of the chapter authorization linked to this role type. This field links to the Chapter Authorizations service.

#### Start Date (Required)

The start date for the chapter authorization selected for this chapter role type.

#### End Date

The end date for the chapter authorization selected for this chapter role type.

**Comments**

Additional information about the chapter authorization.

**General Tab****Name (required)**

The name of the chapter role.

**Description**

A description of the chapter role.

**Status**

The status of the chapter role type. Default option are Active and Inactive.