

Affiliate Member Program

How to pull list of Eligible Members to transfer from active status to Affiliate Status.

1. Login to officers on line with username and password.
2. Select Gold member management icon at screen bottom.
3. Select "Live"
4. Select "Print Center-NM" (top right corner)
5. Select "Data Extract Tool" from the left menu column.
6. Select "Billing Info" from the left menu column.
7. Under general contacts, check the following boxes:
 - a. residence phone, cell phone, primary email
8. Under Primary Address information, click on "Select All"
9. Under Billing Information, check the following boxes.
 - a. Billing Status
 - b. Dues Paid Through
 - c. Dues Assessment Balance.
10. Click on "Get Extract", then click "Ok" to prepare report. It will take about 30 seconds to process
11. Click on "Click here to open".
12. Depending on your system it will either automatically open, or you will need to click on "Open File" to review report. A "BillingExtract().csv" will display. **Note:** If you do not have excel it will not display. if you download the report and send to me, then call I could help you manipulate it then convert it to a pdf file that you can use for the process.
13. Save the file with your "council name" Billing Extract, date; i.e. "12181billingextract, 24SEP24" somewhere on your computer for easy retrieval. **Note:** If you have Excel, select "save as" and change the file extension in the box "save as type:" from CSV (Comma Delimited) to Excel Workbook. This will allow for better manipulation and sorting to prepare the affiliate member report.
14. Click on Column A and Insert a new (blank) column.
15. Copy and paste Column M (Dues Assessment Balance) into newly created Column A.
16. Place cursor on Cell A2, and hold down left click to highlight all cells (Rows and Columns) that have data present.
17. Click on Filter options (on upper task bar right side) AZ sort & Filter upper, then click on down arrow triangle and then select largest to smallest ZtoA.
18. Then save the document. The spreadsheet will reflect your members who have the most to least in dues arrears.
19. Remove those members who owe zero or less and you now have your initial list to start the process to move to the affiliate member program. Be sure to save this file.
20. Share this file with your Council leadership for their review and make a determination on who you want to place in affiliate and who you want to retain in active membership in your council. Remove the guys you want to retain and save.
21. After GK/DGK and you review and agree on who to send to affiliate program send to your DD for processing and CC Bill Kelly State Membership Director at kellywbill@msn.com
22. If you have any questions or I confused you please call me at 801-541-7770 and I will walk you through the process. Yes, this may seem complicated, but it is really easy to do.