



## Release 4.0 Release Notes

eMEMBERSHIP, the state-of-the-art membership and event management system, makes it easy for associations to manage a variety of membership and meeting needs. We have listened to the input of our subscribers and have addressed these needs in the latest version of eMEMBERSHIP 4.0.

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## 1) New Reporting / Adhoc Query Module

Associations have a strong need to create reports and queries of the data that you house in eMEMBERSHIP. The type of reports and searches required by associations can vary and need to be easy to create and flexible. In this vein, eMEMBERSHIP now has a new Reporting and Adhoc Query Module that will allow you the ease and flexibility to create and save custom reports.



- 1) The new Query Wizard give you the ability to search within the People tab based upon any combination of fields in the People, Organization and Event tables.
- 2) You can now generate emails and labels from the Adhoc query.
- 3) The reports tab has totally been redesigned. You are now able to create custom reports and exports of virtually any data in the system.
  - a. The listing page allows you to view all the standard eMEMBERSHIP reports as well as the custom reports developed by you and other staff members.
  - b. A new simple reporting wizard will walk you through the creation of a report or an export.
  - c. The new criteria page that will allow you to filter and sort the reports in different ways.
  - d. Additional lookup fields are available to assist you in creating the proper filters.
  - e. Custom reports can be saved for later use or just be created for one time use.
  - f. Custom reports can be exported in spreadsheet format for further manipulation and sharing
- 4) Additional Standard Reports have been added to the system.
- 5) Security is integrated into the reports.

## 2) Mobile eMEMBERSHIP web application

We understand that association staff are often out in the field with their association members and not always sitting at a computer screen. That being the case, you still need access to the data housed in your eMEMBERSHIP site. To address this need, eBOARDsolutions is proud to announce the support of mobile access to your eMEMBERSHIP data. This new mobile web application is designed to work with some of the new special mobile phones and PDAs on the market today such as Apple's iPhone. The only certified platform for this application is the iPhone but other phones work as well. The application is secure and requires you to sign in to it with your usual user id and password. Once logged in you have access to People, Organizations or Event information. Some of the features are described below:



- 1) Main data lookup options
  - a. By People
  - b. By Organization
  - c. By Event
  
- 2) Each main lookup option allows additional sub searches
  - a. People – Allows search by name, group, committee and event
  - b. Organization – Allows search by name, group and service
  - c. Events – Allows search by event type and date range
  
- 3) After the search, you can:
  - a. Email the person directly from the mobile phone
  - b. Call this person from your mobile phone
  - c. Access a Google map to the address right on your mobile phone
  
- 4) You can look up an organization and be given a list all staff tied to that organization. The staff listing displays Name, Title, Address, Phone and Email.
  
- 5) The event lookup will additionally allow you to list everyone who is registered for an event. This allows you to call or email someone while onsite at an event.
  
- 6) The application is secure and runs under SSL encryption.

### 3) New features and additions

We listen to and value your input on new features and enhancements for eMEMBERSHIP. Over the past year, we have received many “feature requests” through our online submission form and are proud to have addressed many of these suggestions and requests through the release of eMEMBERSHIP 4.0. Below you will see a short list of the updates made based on your suggestions.



- 1) “CC” functionality has been added to the email routines as well as the ability to display “To” and “CC” fields on outgoing emails.
- 2) The preferred mail address field is now required. The label and mail merge pages now use the preferred mail address to produce the labels or the MailMerge spreadsheet.
- 3) The Events module has been re-organized for quicker and easier access to the information you need. The event tabs are now organized into three tabs (Event Setup, Manage Events, Event Reports). Appropriate options are available from each of these tabs
- 4) The registration page will now pull the preferred mailing address of the registrant in the Event module.
- 5) Enhanced BEO (Banquet and Event Order) functionality and BEO reports have been added.
- 6) The option to force a user to change his/her password on next log-in is now available and found under the security tab of a person.
- 7) Added the ability for a district administrator to add a new person when submitting changes to their district profile.
- 8) A new maintenance window has been added to the login process to allow EBS to communicate scheduled site maintenance information to users.
- 9) The eMEMBERSHIP support options page have been enhanced to meet customer needs including but not limited to:
  - The eMEMBERSHIP FAQ’s have been extended to help users more quickly find answers to common questions.
  - A User Forum for eMEMBERSHIP has been added to allow association staff members to exchange ideas and best practices in the use of eMEMBERSHIP.