Abila netFORUM Pro

Real Estate Associations Setup and Configuration Guide

abila™

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Contents

Real Estate Associations Overview

netFORUM Pro for Real Estate Associations has been developed specifically for Local and State Realtor associations and contains the specific forms and processes needed to efficiently manage members and customers.

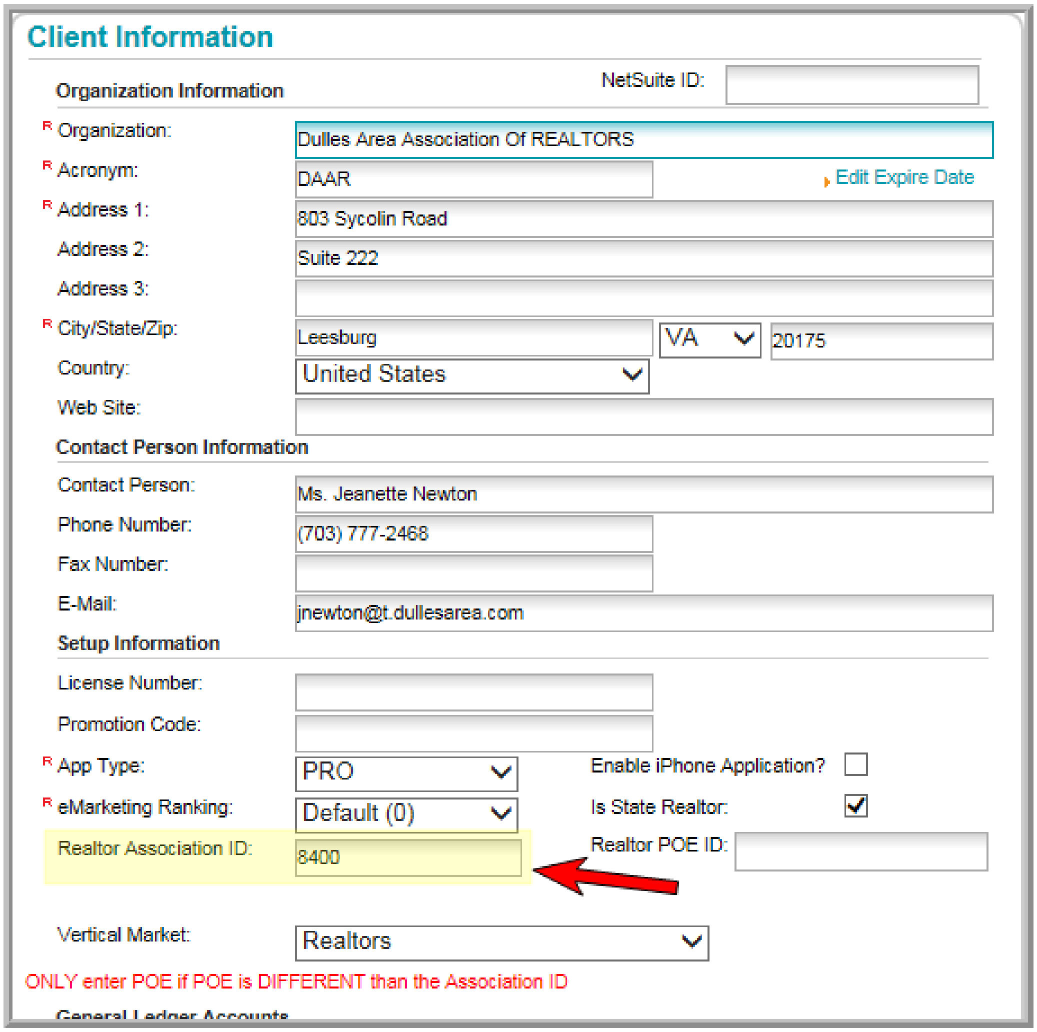
netFORUM Pro for Real Estate Associations features:

- Existing netFORUM Pro **baseline** and **custom demographics** as well as powerful **vertical demographics** added specifically for the Real Estate associations when adding customer records
- Tables to accurately display supplemental and secondary membership records of members whose primary membership resides in the local entity
- Two-way data transfers between the National Realtors Database (**NRDS**) and netFORUM Pro for Real Estate Associations
  - Data transfer to NRDS when a customer record as been added or edited in netFORUM Pro
  - Data transfer from NRDS back to netFORUM Pro to associate supplemental and secondary memberships to a customer record and pull specific changes made for records where an association is the point of entry (POE.)
- Seamless integration with NRDS for **payment processing** so that customers can process credit cards on the Web site using National Association of Realtors® (NAR) eCommerce site (Realtor.org) as the merchant
- **Dues** collection and automatic distribution among several real estate associations and bank accounts for easy and accurate monetary distribution
- **Reports** and **Queries** specific to the real estate market
- **Real Estate demographic** fields that are available in the **Query Tool** for custom query creation

Upgrading to Real Estate Associations

Upgrading to netFORUM Pro for Real Estate Associations normally takes place at the **Implementation** stage because there are generally several additional fields unique to Realtor Associations used and imported during the **data import** stage.

When an entity is initially created, the associated **Realtor Association ID** is entered into the database on the **Client Information** form.



Adding a **Realtor Association ID** triggers the vertical demographic fields and enables the database to take advantage of the Realtor functionality.

Note: The image shown above with the Realtor Association ID field visible is only accessible to Abila Support.

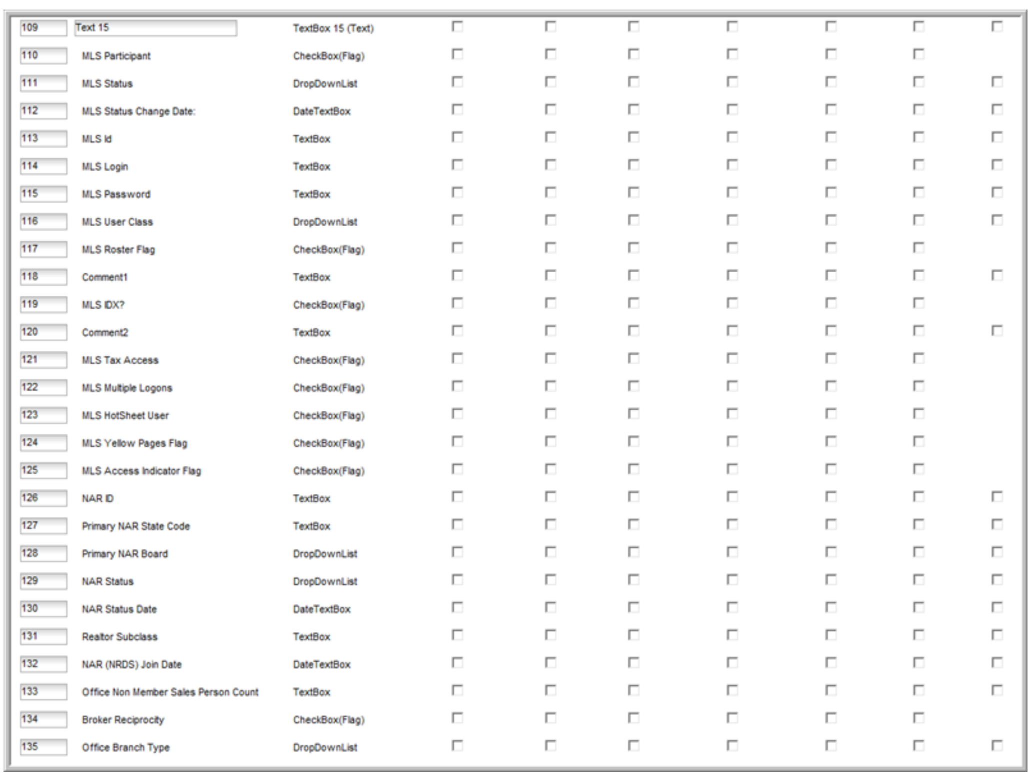
Demographics for Real Estate Associations

One of the biggest features of Real Estate Associations is **vertical demographics**. Vertical demographics are fields that are specific to a vertical market and are not needed in the traditional netFORUM Pro versions. For example, Real Estate vertical demographics feature fields such as **NAR ID**, **Primary NAR Board**, **MLS Status**, **NAR Status**, and **Real Estate License**. Added to the already powerful netFORUM Pro baseline and custom demographics, vertical demographics bring a new layer of depth to netFORUM Pro not previously seen.

Vertical demographics function exactly the same as the baseline and custom demographics. They can be enabled to appear internally, externally, set to be required, added as an order, and so forth.

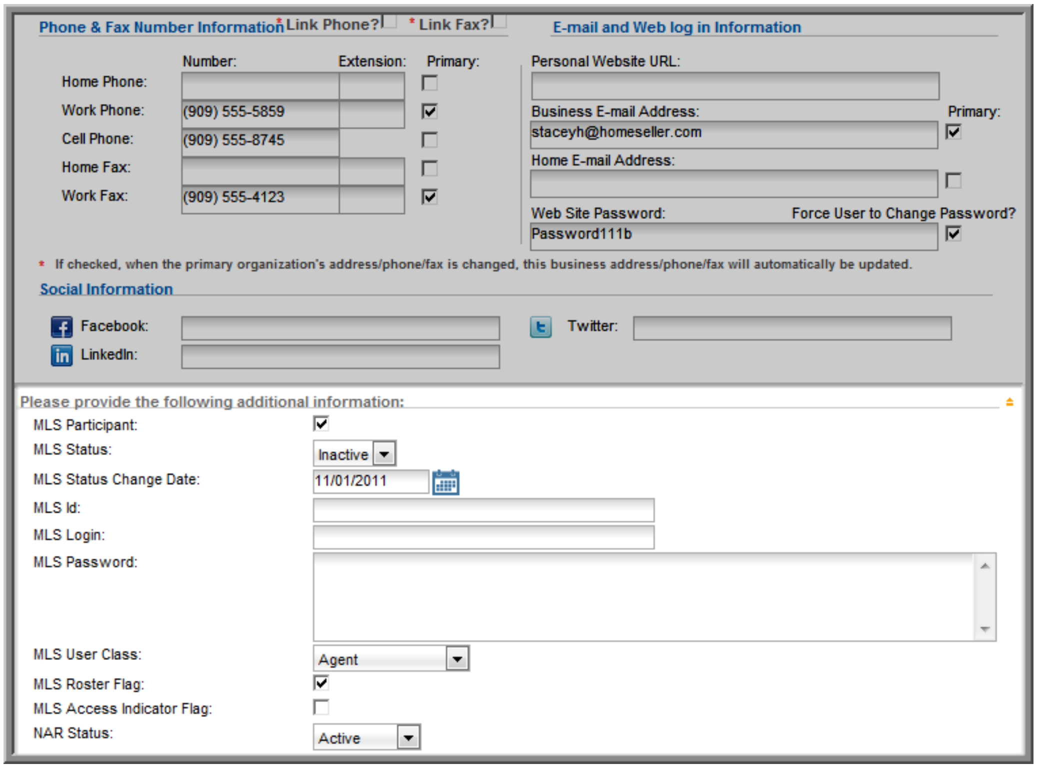
Vertical demographics for Real Estate associations appear at the bottom of the demographics list in the **Setup Demographics** form. For example, note in the image below that, after clicking the Setup Demographics link, demographics appear in the following order:

- Baseline demographics
- Custom demographics
- Vertical demographics



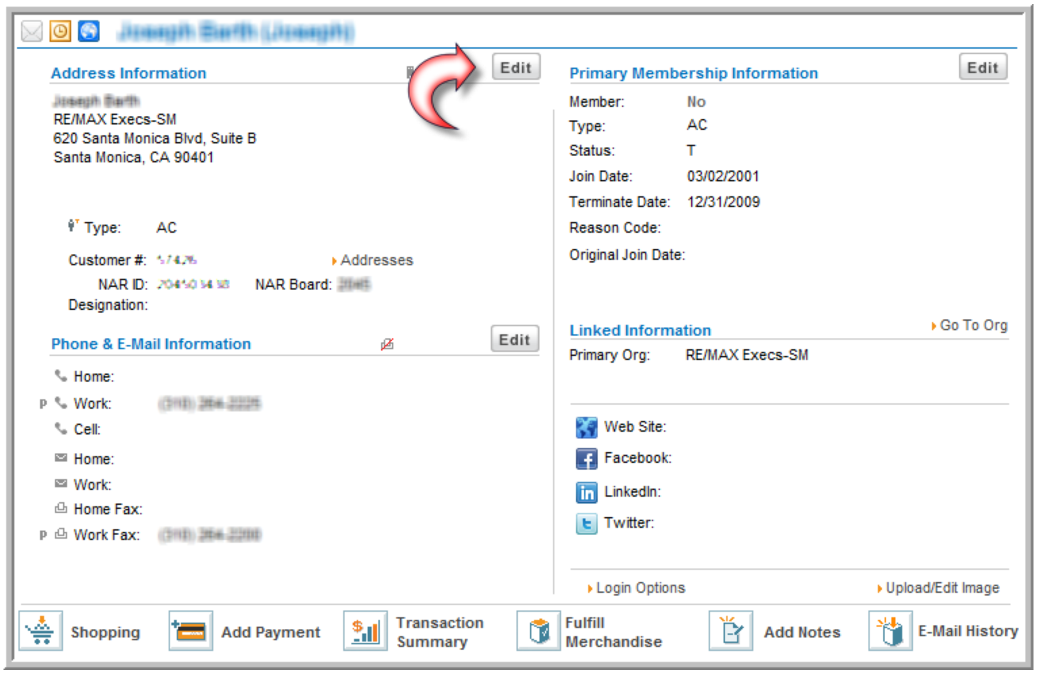
109	Text 15	TextBox 15 (Text)
110	MLS Participant	CheckBox(Flag)
111	MLS Status	DropDownList
112	MLS Status Change Date:	DateTextBox
113	MLS Id	TextBox
114	MLS Login	TextBox
115	MLS Password	TextBox
116	MLS User Class	DropDownList
117	MLS Roster Flag	CheckBox(Flag)
118	Comment1	TextBox
119	MLS IDX?	CheckBox(Flag)
120	Comment2	TextBox
121	MLS Tax Access	CheckBox(Flag)
122	MLS Multiple Logons	CheckBox(Flag)
123	MLS HotSheet User	CheckBox(Flag)
124	MLS Yellow Pages Flag	CheckBox(Flag)
125	MLS Access Indicator Flag	CheckBox(Flag)
126	NAR ID	TextBox
127	Primary NAR State Code	TextBox
128	Primary NAR Board	DropDownList
129	NAR Status	DropDownList
130	NAR Status Date	DateTextBox
131	Realtor Subclass	TextBox
132	NAR (NRDS) Join Date	DateTextBox
133	Office Non Member Sales Person Count	TextBox
134	Broker Reciprocity	CheckBox(Flag)
135	Office Branch Type	DropDownList

After using the **Setup Demographics** link to enable demographics, they will be visible when adding or editing a profile of an individual or organization at the bottom of the profile form in the demographic section.

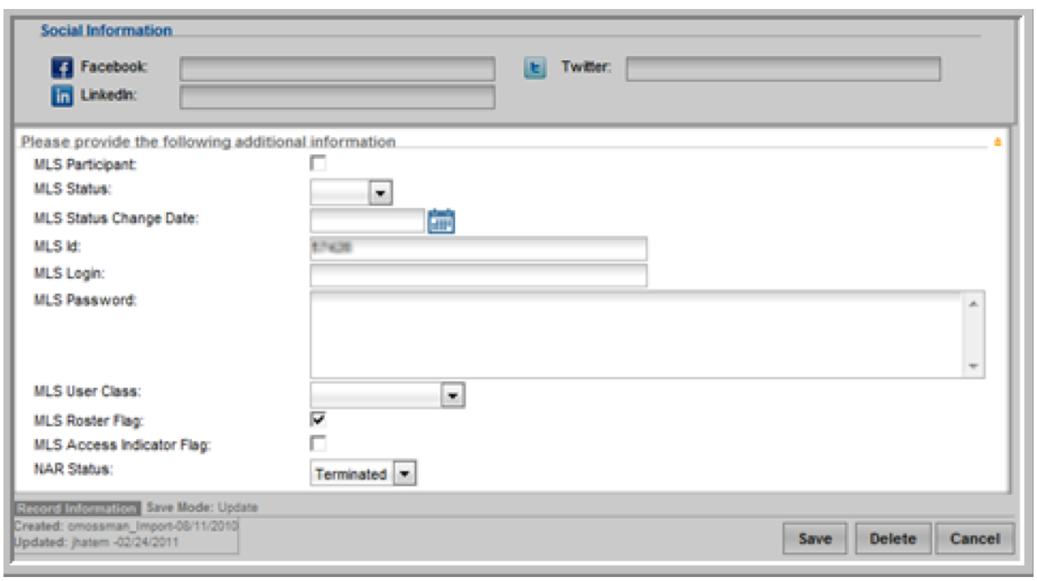


Tip: Demographics that are enabled using the Setup Demographics link can be aligned and customized by look and feel as well by using the Design Demographics link once activated as described in Designing Custom Forms for Demographics.

To edit the profile for an individual or an organization, including the Realtor demographic information, access the appropriate record and click the **Edit** icon in the **Address Information** portion of the form.



This launches the **Personal Information** form and allows all edits to be completed on a single form.

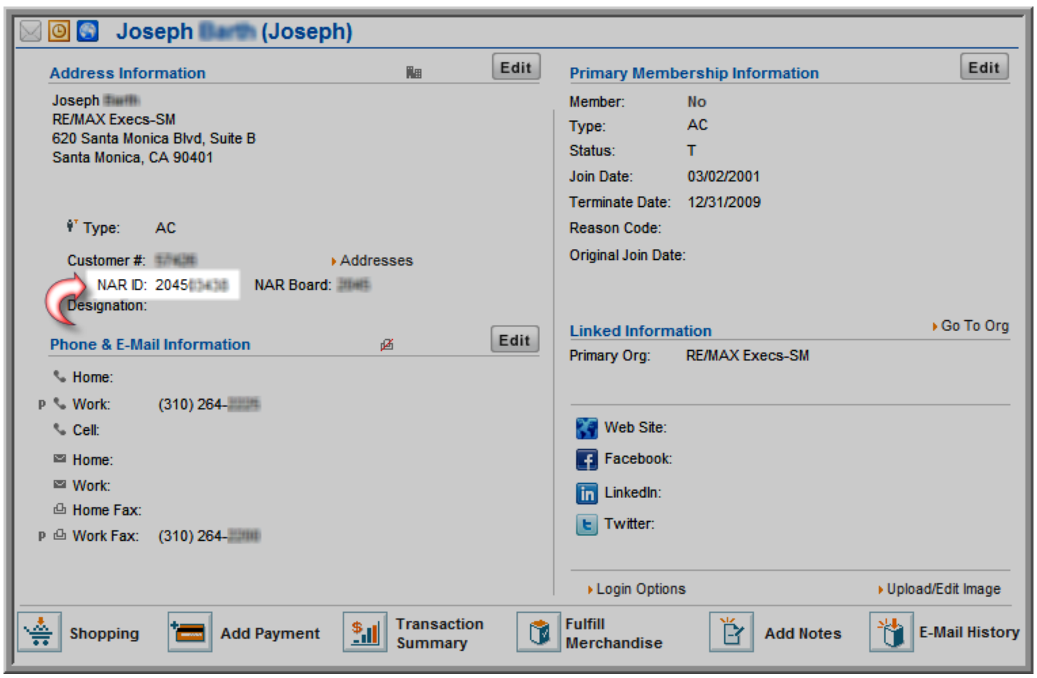


Some of the values available in drop-down fields are also customizable. For example, to add an additional **Primary Board** that is not currently available in that drop-down field, you may do so in the **CRMOverviewSet Up** as part of Real Estate Associations.

The Realtor Demographic Information fields that are customizable (or viewable) in CRM set-up are:

- **Primary Field of Business** (Read-only – Values obtained through NAR)
- **Secondary Field of Business** (Read-only – Values obtained through NAR)
- **Primary Board**
- **Individual MLS Online Status**
- **MLS User Class**
- **Realtor Subclass**

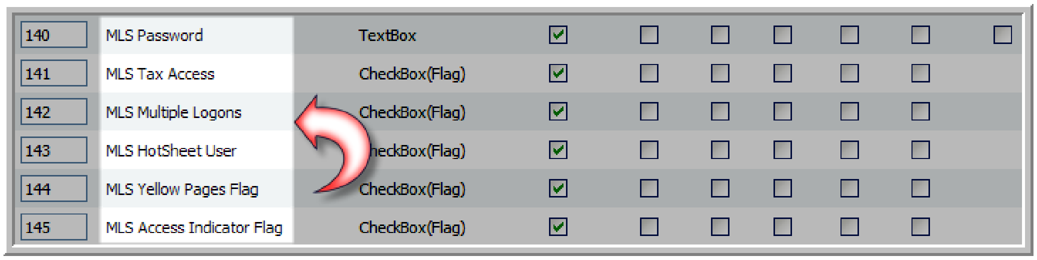
Once certain vertical demographics have been added to a record, they are immediately available at a glance on the individual or organization profile. For example, notice that the profile contains an area for the **NAR ID** and status when available.



MLS Demographics

Several **MLS** (Multiple Listing Service) demographics exist within netFORUM Pro. The MLS demographics all have the "**MLS**" prefix, such as the **MLS Tax Access** demographic. Some of the MLS demographics work across all MLS vendors, while certain MLS demographics are only for specific

MLS vendors. Review the MLS export file to understand which MLS fields are needed to enable and manage.

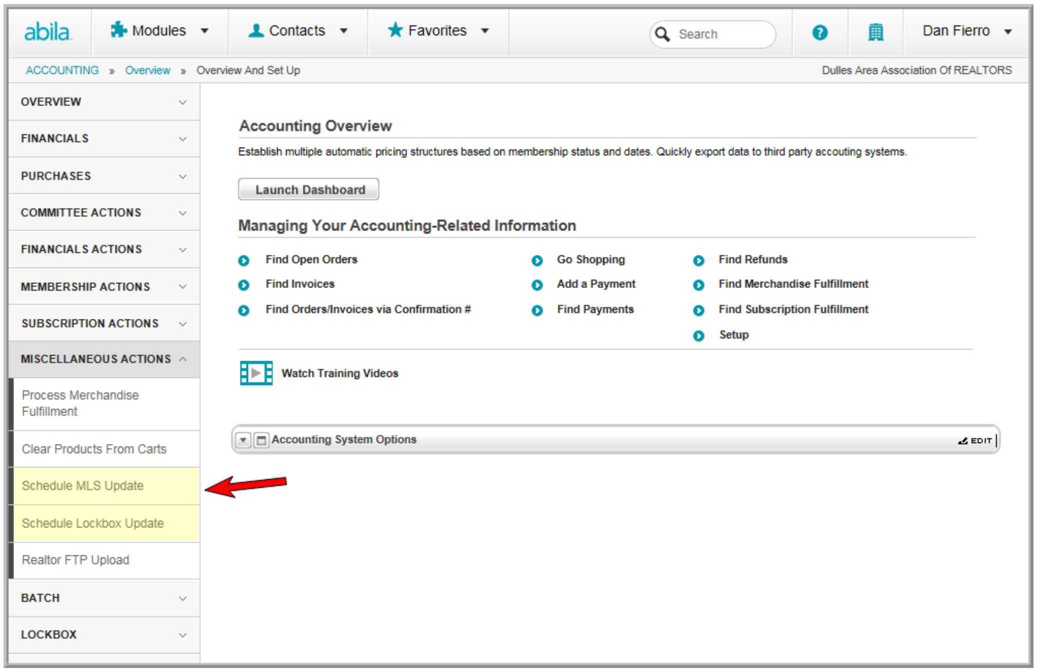


MLS/Lockbox FTP Data Process

An FTP process can be enabled on the netFORUM back end that will transfer MLS or Lockbox demographic and customer data to the appropriate MLS or Lockbox vendor for data import.

Note: To **set up this FTP Process for MLS or Lockbox**; several system options must be configured by Abila Support. Have the MLS/Lockbox Credentials (user/login and password), vendor name and contact, URL for FTP site and sample export file for Agents and Office when placing a call to Abila Support to enable these system options.

Once the MLS and/or Lockbox system options have been enabled, and the backend data transfer file created for the vendor, go to **Accounting > Miscellaneous Actions** > **Schedule MLS Update** or **Schedule Lockbox Update**. Then schedule when the MLS or Lockbox file gets sent to the vendor's FTP site. For several vendors that use FTP sites for data, invoke rules that only one file can be sent and another file will not be accepted on the FTP site until the first file has been cleared.



MLS Lockbox products should be set up and sold as subscriptions in netFORUM Pro and the subscription code must contain MLS or Lockbox in order to be pulled. MLS Lockbox products that are not set up as subscriptions will not get pulled in the third party data set for MLS and Lockbox vendors.

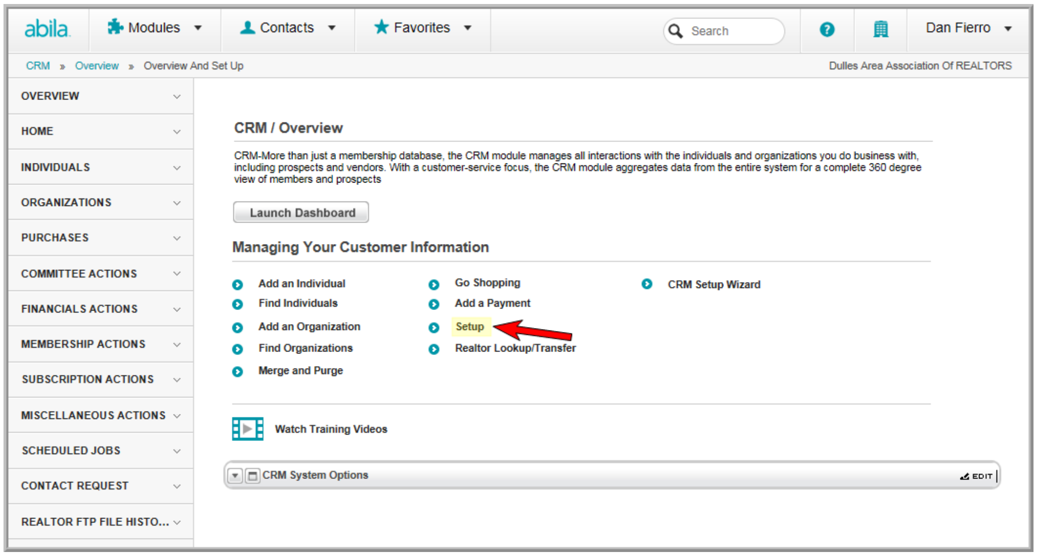
CRM Set-up for Vertical Demographics

Certain **vertical demographics** within netFORUM Pro for Real Estate Associations may require additional set-up or further customization for a specific organization.

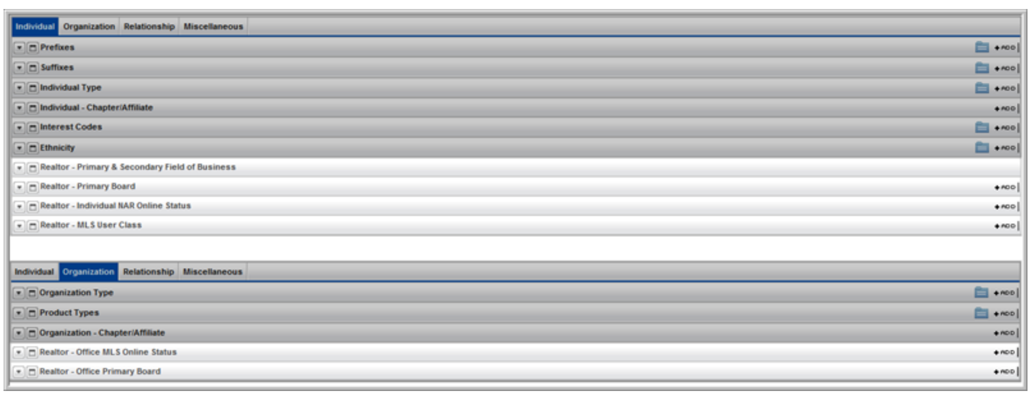
Those demographics are:

- Primary Field of Business (Read-only – Values obtained through NAR)
- Secondary Field of Business (Read-only – Values obtained through NAR)
- Primary Board
- Individual NAR Online Status
- MLS User Class

To modify the drop-down fields for these vertical demographics, access **CRM Overview** and click the **Set Up** option.

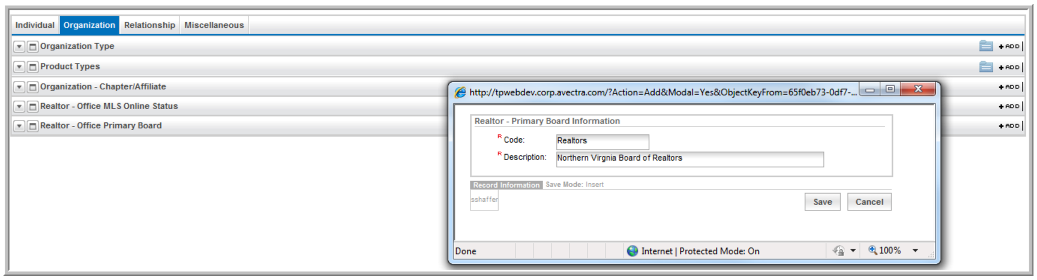


Expand the **Individual** tab and the **Organization** tab to see that each have functions specific to Real Estate.



Tip: Notice that the Organization tab fields are the same fields found on the Individual tab. Update MLS Online Status or Primary Board on one tab and it will be automatically updated on the other tab. There is no need to update both.

To add a new item to the drop-down lists that appear on a form, click the **Add** link next to the field. Enter a **Code** and a **Description** for the new field selection. Both are required.



What actually appears in the drop-down menu is what is entered in the **Description** field. Using this example, “Northern Virginia Board of Realtors” would appear as a selection for the **Primary Board** drop-down after clicking **Save**.

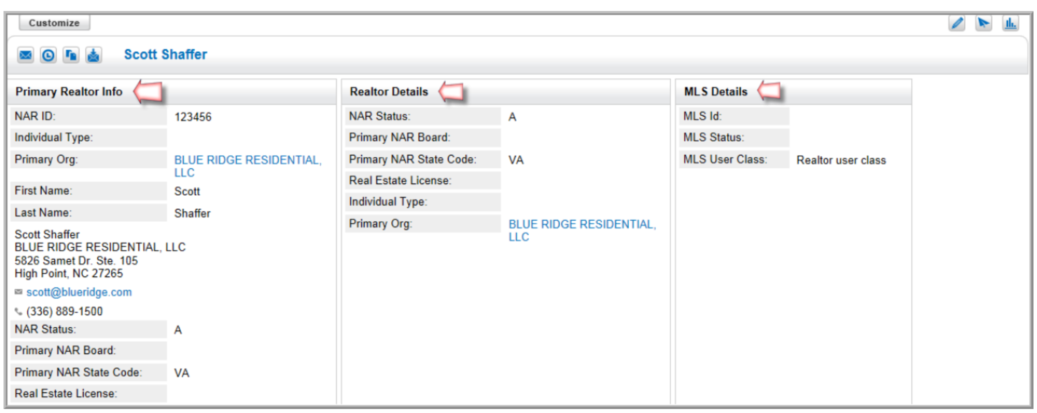
Individual Profile Customization

Individual profiles in netFORUM may be customized so that only the information pertinent to an organization displays on the profile page.

Three customizable blocks have been added to netFORUM Pro specifically for realtors:

- Primary Realtor Info block
- Realtor Details block
- MLS Details block

The fields in these blocks are filled based on data found in the individual profile from individual and demographic data.



Complete details on customizing an individual profile can be found in Customizing a Profile.

Data Management for Realtors

Creating a netFORUM Pro for Real Estate Associations entity will involve the same processes used to create other netFORUM Pro entities. Part of this process will be organizing data for data import into the entity. A netFORUM Pro account manager helps coordinate this effort.

As a result, there are two additional tabs needed for Abila's **Data Import Workbook** for this application; the **Real Estate Individual tab** and the **Real Estate Organization tab**.

NAR ID

Once the data import has been completed, provide the data import specialist the highest (last) NAR ID so that the netFORUM Pro NAR ID counter can be enabled. The counter will create NAR ID's in the next order based on the NAR ID number and increment providee to the data specialist.

The NAR ID can be generated while entering records into netFORUM Pro by initially entering a zero in the NAR ID field and saving.

ENABLING DATA TRANSFER TO NRDS

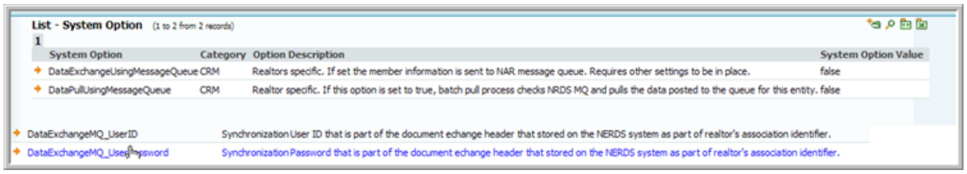
netFORUM Pro for Real Estate Associations has been designed to interact with **NRDS** (NAR's Centralized Database) so that when there is a change or edit to a specific type of customer record in netFORUM Pro, this change will also be sent to NRDS. In addition, a netFORUM Pro for Real Estate Associations entity will receive certain data transfers from **NRDS**. The data transfers from **NRDS** will currently be limited to updated data and will be based on the **NAR's** point of entry (POE) security rules.

When receiving data from NRDS, the business process will not change and will continue to receive e-mail updates that can be used to update the system manually with any record changes sent by NRDS. All **customer record additions** to NRDS will need to be added to netFORUM Pro manually as the data transfer from NRDS to netFORUM Pro does not include adding/creating a new customer record.

Once the data import has been completed, an account manager assists to determine a timeframe for enabling the **NRDS Data Transfer**. Enabling the data transfer option involves several steps that may take multiple days to complete. Allow at least three to four business days of processing time between the initial request and the actual data transfer activation. If currently using the data transfer with another AMS vendor, it is recommended that the transfer be turned off prior to formatting the data to import to netFORUM Pro to assure that the latest data is put in netFORUM Pro.

DATA TRANSFER SYSTEM OPTIONS

Below are several Data Transfer Scenarios based on System Option Set up. Work with Abila support or an account manager to enable these.


List - System Option (1 to 2 from 2 records)

System Option	Category	Option Description	System Option Value
DataExchangeUsingMessageQueue	CRM	Realtors specific. If set the member information is sent to NAR message queue. Requires other settings to be in place.	false
DataPullUsingMessageQueue	CRM	Realtor specific. If this option is set to true, batch pull process checks NRDS MQ and pulls the data posted to the queue for this entity.	false
DataExchangeMQ_UserID		Synchronization User ID that is part of the document echange header that stored on the NERDS system as part of realtor's association identifier.	
DataExchangeMQ_UserPassword		Synchronization Password that is part of the document echange header that stored on the NERDS system as part of realtor's association identifier.	

1. If the **UserID** and **Password** are set up but the **Data Exchange** and **Data Pull** system options are set to **false**, then the realtor staff will only be able to **look up** realtor individuals (from CRM Overview), transfer an individual and refresh an individual or organization record. NOTE: If an individual is not a member (member flag is N) then the refresh button is removed from that customer profile.
2. If the **UserID** and **Password** are set up and the **Data Exchange** system option is set to **true**, the realtor staff can **look up** realtor individuals (from CRM Overview), transfer an individual, refresh an individual or organization record; **AND PUSHdatabased on NAR rules to NRDS**.
3. If the **UserID** and **Password** are setup and the **Data Pull** system option is set to **true**, the realtor staff can **look up** realtor individuals (from CRM Overview), transfer an individual, refresh an individual or organization record; **AND PULL data available from NAR for the specific POE/realtor association**.
4. If **all** of the system options are setup with correct values, realtor staff will be able to look up realtor individuals, transfer an individual if valid, refresh an indiv/org, Pull data available from NAR; **ANDPUSH data based on NAR rules to NRDS**.

Data Transfer Overview

As mentioned, updates or adds made in netFORUM will push updates to NRDS. When these updates are appear in NRDS is dependent on the NRDS data queue; and the volume it is experiencing.

Updates are sent to NRDS only when you edit and save a specific type of customer record. Membership has to be included in the record for the data transfer to occur which means simply creating an individual record will not send an update to NRDS.

Member types recognized by NAR for data transfer are:

- R - Realtor
- RA - Realtor Associate
- I - Institute Affiliate
- AFF - Local or state Affiliate member
- S - Association Staff
- N - Non member licensee

Memberships have to be set to Primary in netFORUM Pro.

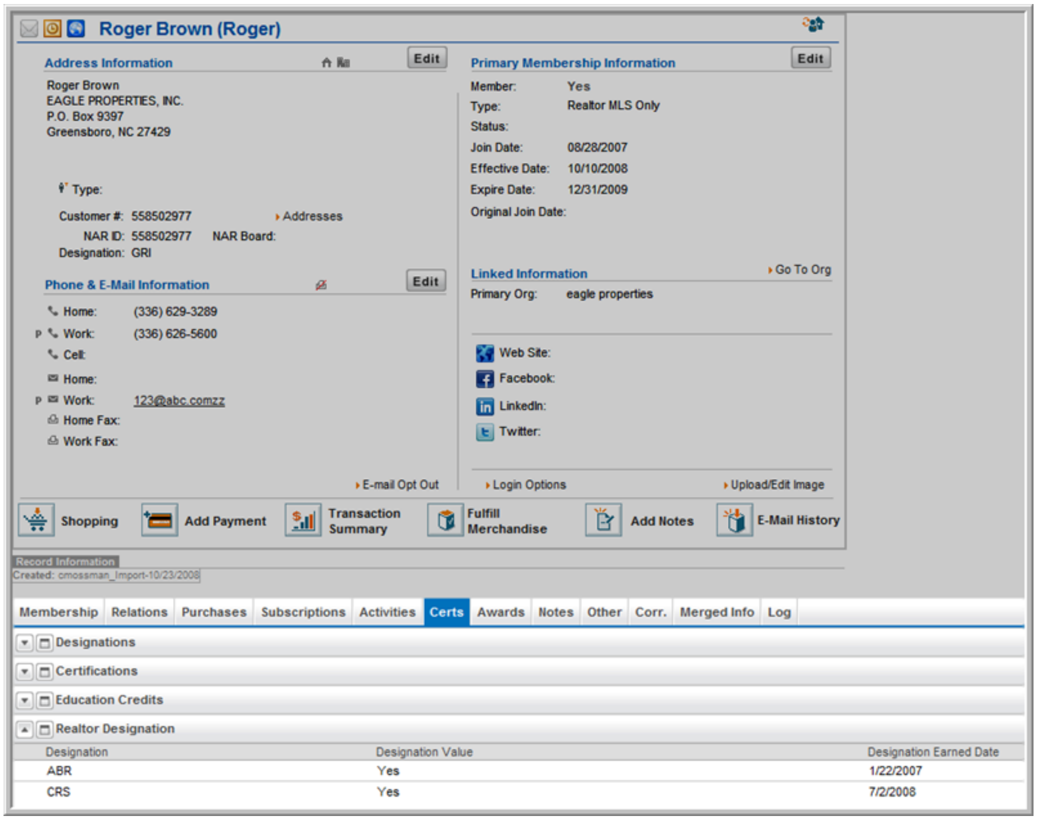
To create or edit an individual or Office record in a Realtor entity, refer to the NRDS Data Transfer Matrix to review the required fields for NRDS data transfer and to see a list of all the fields that netFORUM Pro will send to NRDS in addition to the required fields.

Data push and pull from NRDS will process every hour.

Realtor Designations

Realtor Designations for an individual will be pulled into netFORUM Pro from NRDS. This data is only pulled in and is never pushed from netFORUM Pro to NRDS per NAR recommendations.

View **Realtor Designation** information by opening an individual profile and clicking on the **Certs** tab. This provides the **Realtor Designation** child forms which can be expanded to view these items. If an individual has data in the **Realtor Designations** child form it will also appear on the **My Professional Development** page of eWeb if enabled through the **Website Wizard**.



Tip: The **Realtor Designations** option does not have a **+Add** link. This is because **Realtor Designations** can only be pulled in from NRDS and are not available to manually added in netFORUM Pro.

Education Credits

Education Credits entered for realtors must contain data in the following fields in order to facilitate the two-way transfer of data between netFORUM and NRDS:

- **Group Code–Required Field** - This is an alphanumeric field with a character limit of no more than 7 characters.
- **Course Code – Required Field** - This is an alphanumeric field with a character limit of no more than 7 characters.

For **Code of Ethics training for new members**, enter the code **COEN**. For **Code of Ethics training for current/existing members**, enter code **COEC**.

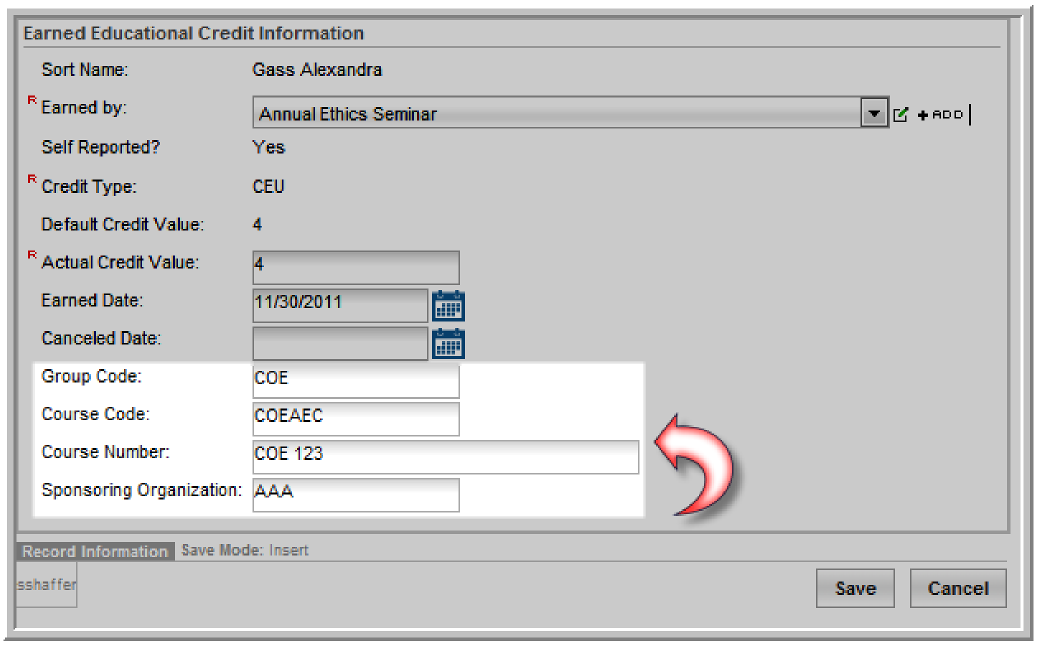
Tip: Only those Education Credits that have a course code of COEN or COEC will be transferred between netFORUM Pro and NRDS.

- **Course Number** – **Required Field** - This is an alphanumeric with a character limit of 15 characters.

For **Code of Ethics** training, this field is used to uniquely identify the course.

For the **COEC** course, the format should be the year the member took the course, followed by the cycle. For example, for Cycle 3 courses (2009 - 2012), the cycle would be C3. So if a member took the course in 2009, the Course number would be 2009C3.

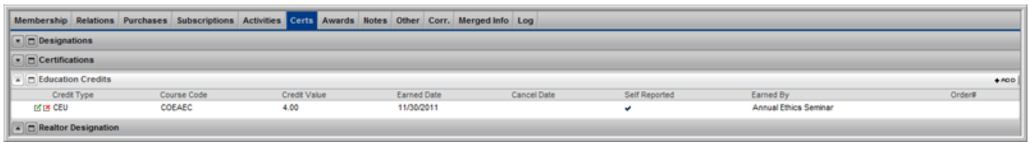
For the **COEN** course, it is the year the new member took the course followed by a 1, such as 20061, 20071, etc.



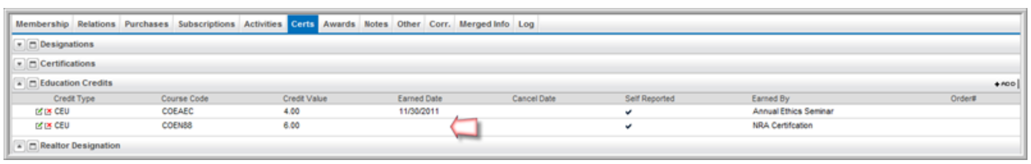
The new fields (**Group Code**, **Course Code**, **Course Number**, and **Sponsoring Organization**) display on the education credit form and enable linking credits to a product. This allows credits to be earned based on the purchase of the product or registration of the event. See the **Setting Up Education Credits for an Event** topic of netFORUM Pro's **Online Help** for more information. These fields also display on the **Self Reported Credits** add form.

Viewing Education Credits

Education Credits can be viewed in iWeb by going to a user's individual profile and clicking on the **Certs** tab. This displays the **Education Credits** child form. Click the down arrow to expand the child form to view all Education Credits for that individual.



Notice the **+Add** link for the Education Credits option. The **+Add** option for **Education Credits** allows for **Education Credits** to be entered manually as **Self Reported** credits in netFORUM Pro for Realtors. Any **Education Credits** entered for a realtor (that have the **COEN** or **COEC** course code) will be transferred to NRDS as soon as the **Save** button is clicked. However, if the **Earned Date** field is empty, the education credit will not be transferred to NRDS until an **Earned Date** is present.



For example, if an individual registers for a course that will award credits and will be held on a future date, when the individual adds this course to their profile and clicks the **Save** button, there will be no **Earned Date** present since the course has not yet occurred. Once the course is completed and an **End Date** is added to the profile, the **Education Credit** data will be transferred to NRDS.

Once added, the following **NAR fields** cannot be changed:

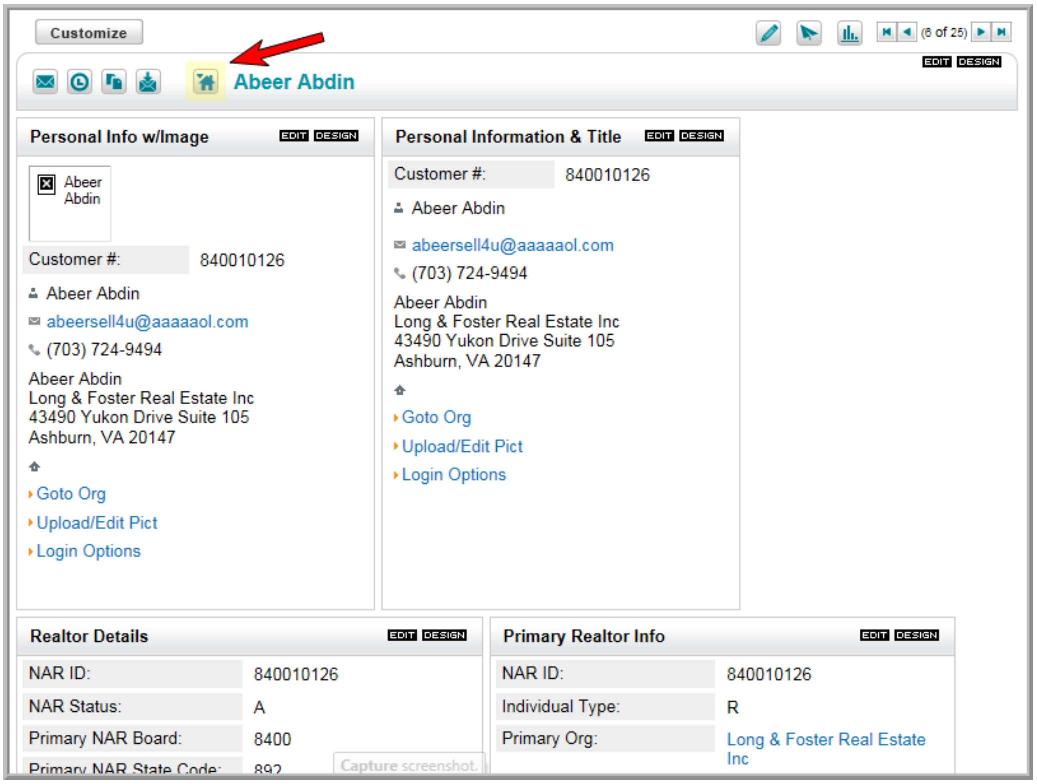
- **Group Code**
- **Course Code**
- **Course Number**
- **Sponsoring Organization**

Education Credits are also visible in eWeb by logging in and clicking the **My Professional Dev** link in the left navigation bar.

Realtor Designations will appear below **My Education Credits** if the individual has any designations.

Refresh Customer Data Icon

The **Refresh Customer Data** icon can be found on an individual or organization profile page within netFORUM Pro for Real Estate Associations entities. This icon enables users to grab updated data for an individual or organization from NRDS.



Clicking the **Refresh** icon will go to NRDS and then refresh the individual or organization realtor customer data with any updated data (if available.) If updated data is not available, the individual profile page will refresh with the same information displayed.

To update address data for realtors whose organization address flows down from their primary organization, go to that organization profile page and update the address information. Once the organization address is updated, it will flow down to those realtors where the address is linked to organization’s address in netFORUM Pro.

Note: All data transferred from NRDS is bound by standard NAR rules.

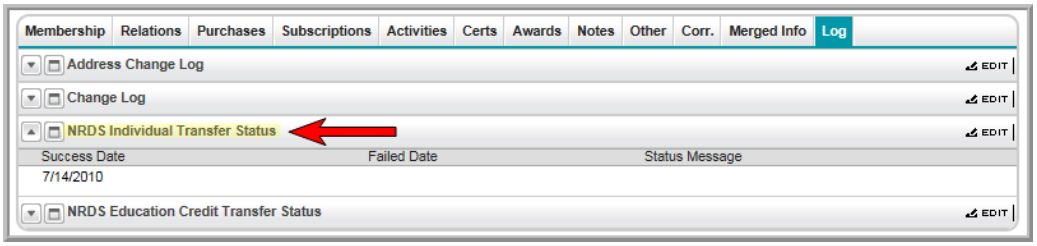
To view the NRDS transfer status for a specific user, visit their profile page and click on the **Log** tab.

NRDS Transfer Status Child Form

The NRDS Transfer Status child form enables viewing the most recent status of data transferred to NRDS from the data push functionality for individual or organization customer records.

To view the NRDS Transfer Status:

1. Click the **Log** tab located toward the bottom of the individual or organization profile page.



2. Click the **NRDS Transfer Status** expand icon. This will provide a listing of NRDS data transfers and the status for each.

Realtor Lookup/Transfer

The **Realtor Lookup/Transfer** feature in netFORUM Pro provides an efficient way to manage individual realtors who wish to transfer to another local board. With this functionality netFORUM Pro sends a transfer request to 'steal' the individual.

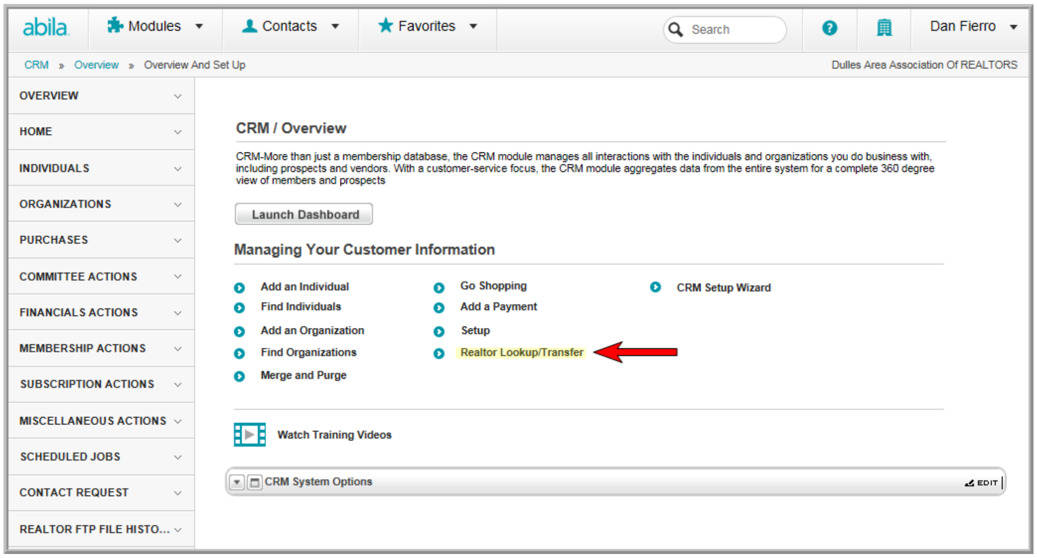
When an individual requests to have their membership transferred, it first must be verified that they are actually a realtor with a valid NAR ID. The **Realtor/Lookup Transfer** feature provides the means to allow you to view a NRDS record and to validate an individual's realtor ID from netFORUM Pro. If an individual is verified as a realtor, their account information can be pulled into netFORUM Pro and their customer record is created. Note that during this transfer, no membership information is pulled in from NAR.

Tip: If no records are returned, you must manually add the individual into netFORUM Pro as you would any other new realtor.

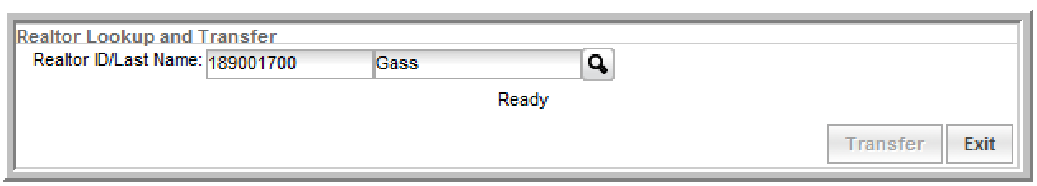
Once the data has been found and the customer record has been created, the newly added realtor (individual) can complete the processes necessary to pay for their new membership. Once the transfer request has been processed by NAR/NRDS, the individual's previous local board will become a supplemental affiliation on the customer's record in NRDS. This data will also be pulled into netFORUM Pro after record creation. Based on the NRDS queue there may be a lag in seeing this supplemental data.

To use Realtor Lookup/Transfer:

1. Launch a real estate entity of netFORUM Pro.
2. Hover over the **Modules** tab located along the top navigation bar and click **CRM**.
3. Click the **Realtor Lookup/Transfer** icon on the **CRM/Overview**.



This will launch the **Realtor Lookup/Transfer** pop-up window.

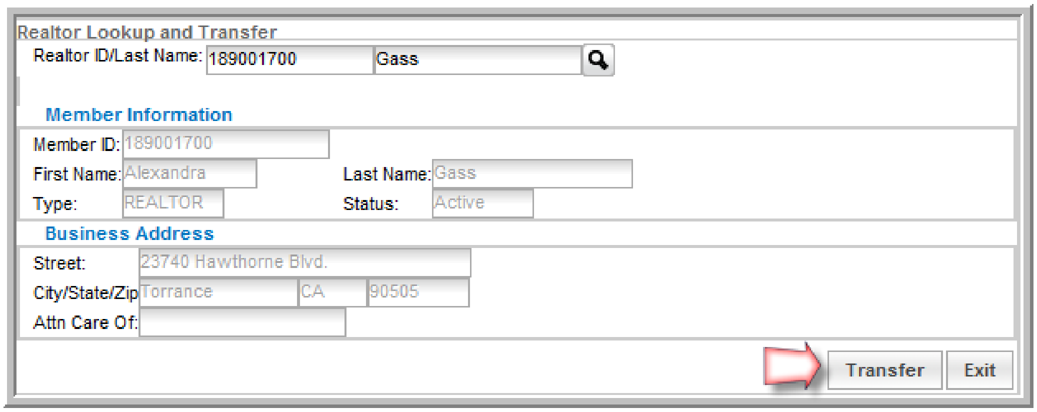


4. Enter the **Realtor ID**; or the **Realtor ID**and the **Last Name**of the realtor for which you are searching.

   Tip: Enter the **Realtor ID**. Entering a last name will not return any results. Also, this functionality is not built by NAR to handle Organization NAR ID lookup.

5. Click the **Search** icon located next to the **Realtor ID/Last Name** fields.

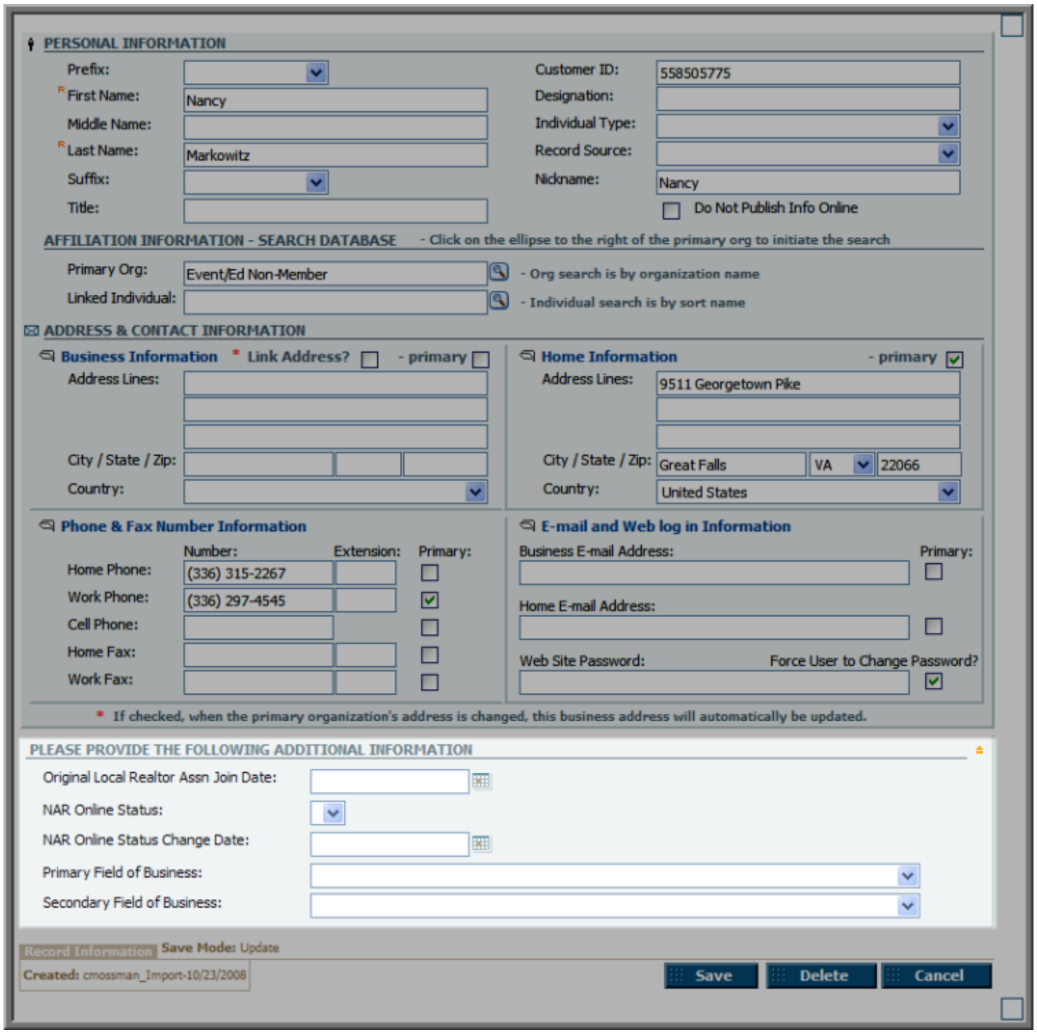
This will pull up information about the individual searched.



6. To 'steal' the customer and make them part of another realtor association; click the **Transfer** button.

By clicking the Transfer button, netFORUM Pro will request from the backend to NRDS that the customer record be transferred to another local board. By nature of NRDS rules, the customer's previous primary board will become a supplemental membership in the netFORUM Pro Supplemental Membership table. After the transfer request has been handled by NRDS, netFORUM Pro will then 'grab' the data through the pull/refresh functionality and create the customer record.

The new record will be created without a membership. Realtor staff can then sell the specific membership to the customer and apply payment. Staff should edit the customer profile and verify the NAR status is **Active**. Once the status is verified, the profile should be saved. Upon saving the membership data will then be pushed to NRDS.



Accounting Set-up for Real Estate Associations

Real Estate Associations need to be concerned with these items that vary from regular netFORUM Pro users when concerned with Accounting set-up:

- "Setting Up Realtors Electronic Commerce as a Payment Processor" (page 23)
- "Setting Up Telecheck as Payment Method" (page 25)
- "Using Mail My Check as a Payment Method" (page 28)
- "Setting Up Banks for Multi-Cash Accounts" (page 29)

- "Setting up Charge Codes for Automatic Dues Distribution" (page 31)
- "Setting Up Products for Ecommerce Distribution" (page 35)
- "QuickBooks for Realtors" (page 39)

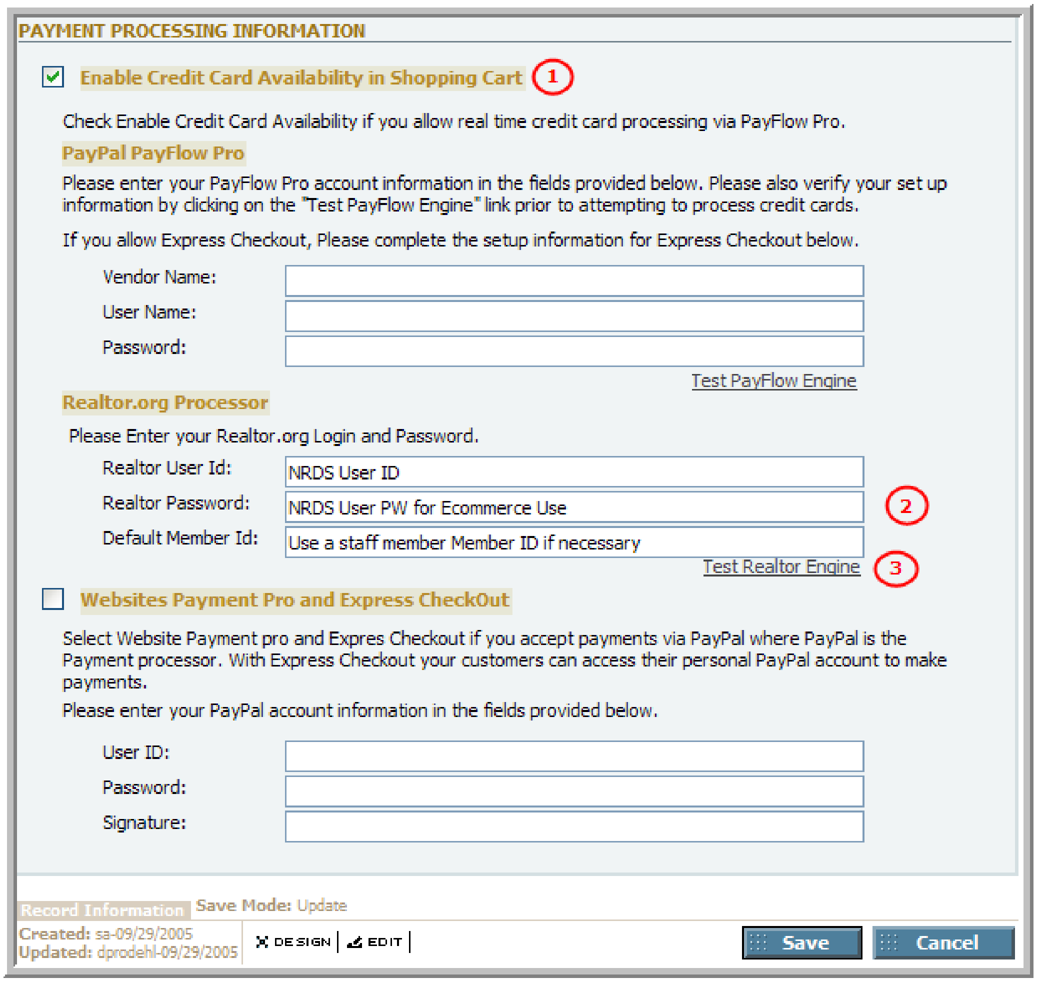
Setting Up Realtors Electronic Commerce as a Payment Processor

Real Estate associations may use **Realtors Electronic Commerce** or PayPal as their payment processor.

Tip: If not using Realtor.org as a payment processor, learn about other payment options by visiting the netFORUM Pro online help and search on the topic, **Setting Up Payment Processing Options**.

To set Realtor.org as the payment processor:

1. Select the **Enable Credit Card Availability in Shopping Cart** check box.



2. An Abila account manager will complete the Realtor.org Processor fields.

Note: Provide Abila with only the default member ID (typically this is a nine digit user ID of a staff member.)

3. Click the **Test Realtor Engine** link.

Enable Credit Card Availability in Shopping Cart – Selecting this check box will enables customers to use credit cards when using a Web site to purchase products.

Realtor User ID/Password: Completed by using NRDS User ID and Password that is used for Ecommerce. Abila will obtain the user ID and Password by contacting NRDS directly.

Default Member ID: NRDS requires that a **NAR ID** is sent with every Ecommerce transaction it receives without exception. To satisfy this requirement, it is suggested that a staff member ID is used as the **Default Member ID** in case a customer attempts to process a transaction and does not posses their own ID.

Test Realtor Engine – Once all fields have been completed, click the **Test Realtor Engine** link to verify that the payment processor setup is correct. A success message indicates the ability to begin accepting credit card transactions on a Web site. If there is no success message, verify that all of the payment processing data has been entered correctly. Contact an Abila account manager if unable to successfully test the payment processor.

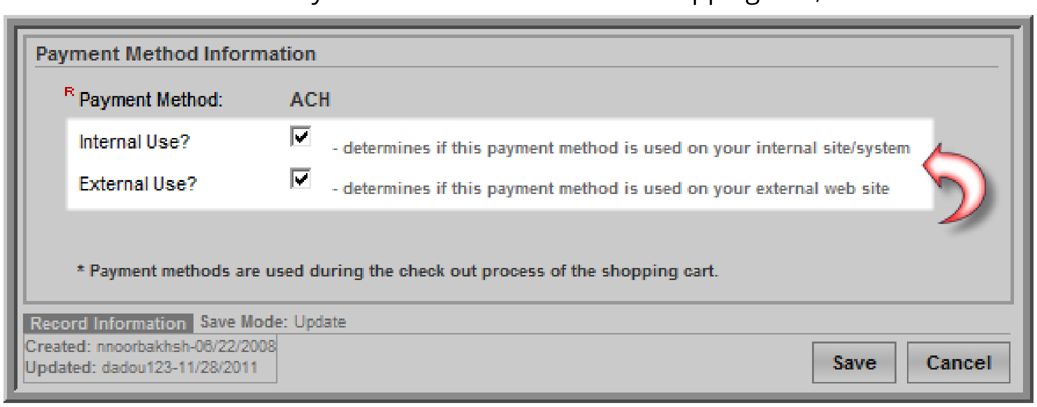
Setting Up Telecheck as Payment Method

Realtor entities may also set up the **Telecheck** (**ACH**) payment method for use in the iWeb and/or the eWeb shopping cart.

To enable Telecheck (ACH) as a payment method:

1. Hover over the **Modules** tab located along the top navigation bar and click **Accounting** to open the **Accounting Overview** page.
2. Click the **Setup** link to open the Accounting **Overview and Setup** page.
3. Expand the **Payment Methods** child form.
4. Click the **Edit** icon next to the **ACH** Payment Method. This will open the **Payment Method Information** pop-up window.
5. To enable **ACH** as a Payment Method in the iWeb Shopping Cart, click the **Internal Use?** checkbox.

   To enable **ACH** as a Payment Method in the eWeb Shopping Cart, click the **External Use?** checkbox.



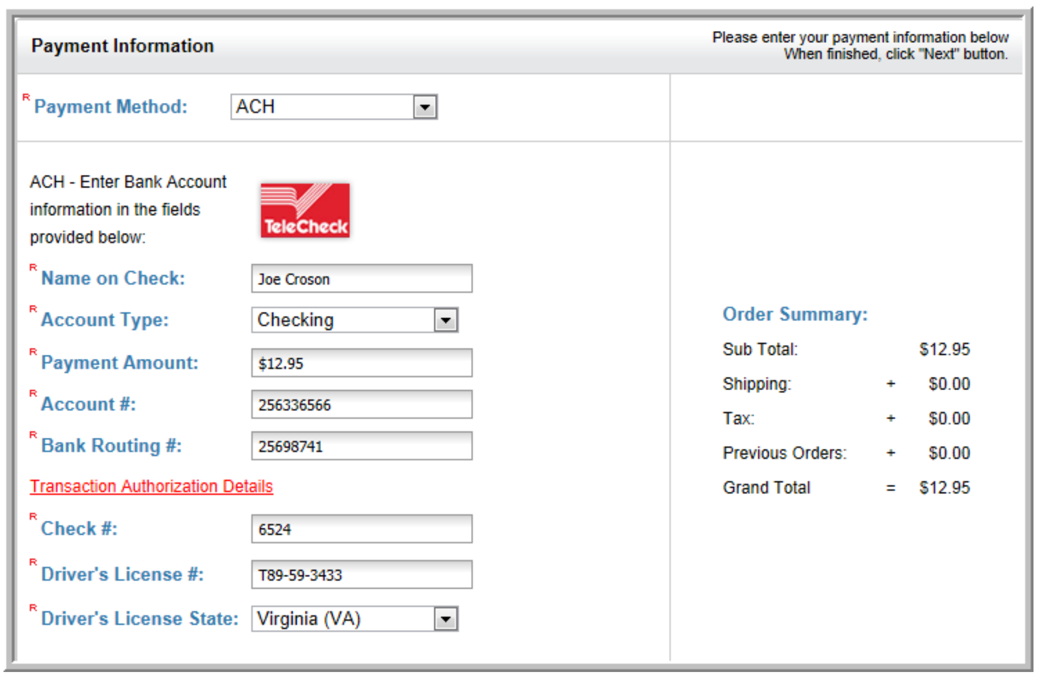
6. Click the **Save** button.

Using Telecheck (ACH) as a Payment Method in iWeb

To use the Telecheck (ACH) Payment Method when checking out:

1. Proceed through the normal purchasing steps to purchase a product.
2. On the **Payment Information** screen, expand the **Payment Method** drop-down menu.
3. Select the **ACH** Payment Method.

   Selecting **ACH** will display the necessary fields for completing the transaction.
4. Enter the name on the check being used for this purchase in the **Name on Check** field.
5. Expand the **Account Type** drop-down menu and select the account type the check is being drawn from.



6. Enter the amount of the payment in the **Payment Amount** field.
7. Enter the account number in the **Account #** field.
8. Enter the routing number for the bank in the **Bank Routing #** field.

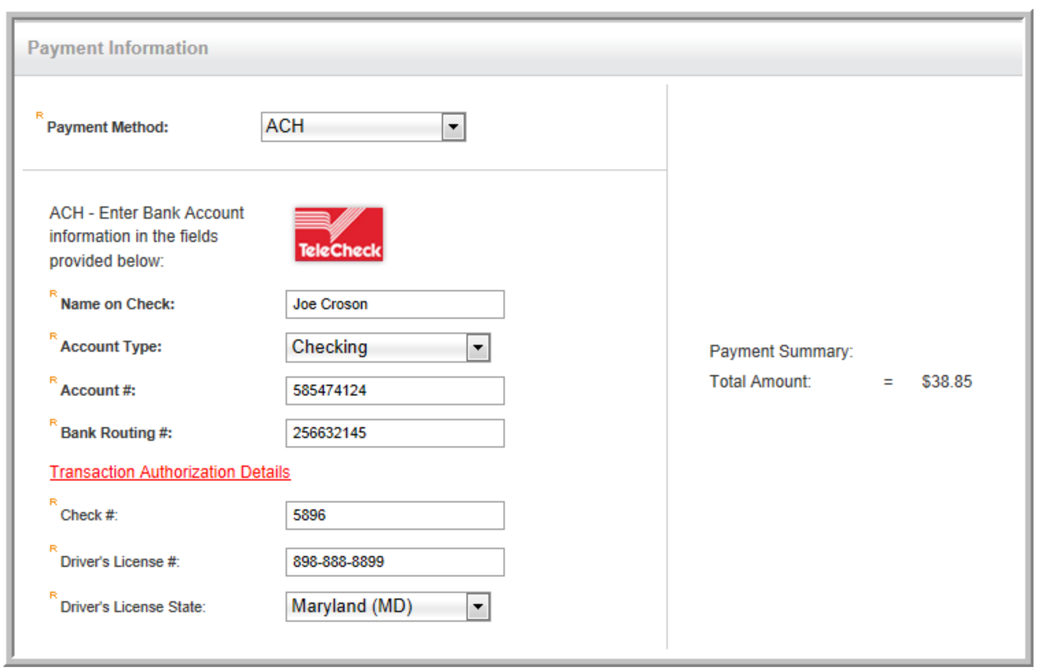
Tip: Guide customers to review the ACH policies by clicking on the **Transaction Authorization Details** link.

9. Enter the check number in the **Check #** field as required by NAR ecommerce.
10. Enter the driver's license number of the person writing the check in the **Driver's License #** field as required by NAR ecommerce.
11. Expand the **Driver's License State** drop-down menu and select the state in which the driver's license is issued as required by NAR ecommerce.
12. Click the **Next** button to proceed with the transaction.

Tip: For Realtor entities only, specify the **CheckNumber**, **Driver's LicenseNumber**, and **Driver's License State**. In addition, during the completion of this transaction, a **valid email address** must be transmitted from NRDS for the individual writing the check. Failing to have a valid email address will cause an error and not allow the transaction to complete.

Using Telecheck (ACH) as a Payment Method in eWeb

The steps for using Telecheck (ACH) as a Payment Method in eWeb are nearly identical to those for using Telecheck (ACH) in iWeb. The only difference is that the **Payment Amount** does not need to be specified in eWeb.

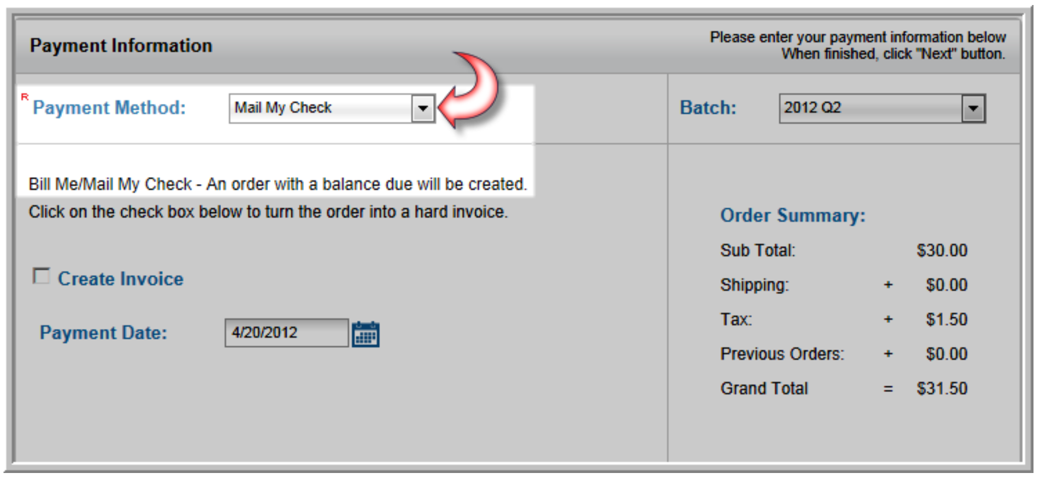


Tip: Guide customers to review the ACH policies by clicking on the **Transaction Authorization Details** link.

Using Mail My Check as a Payment Method

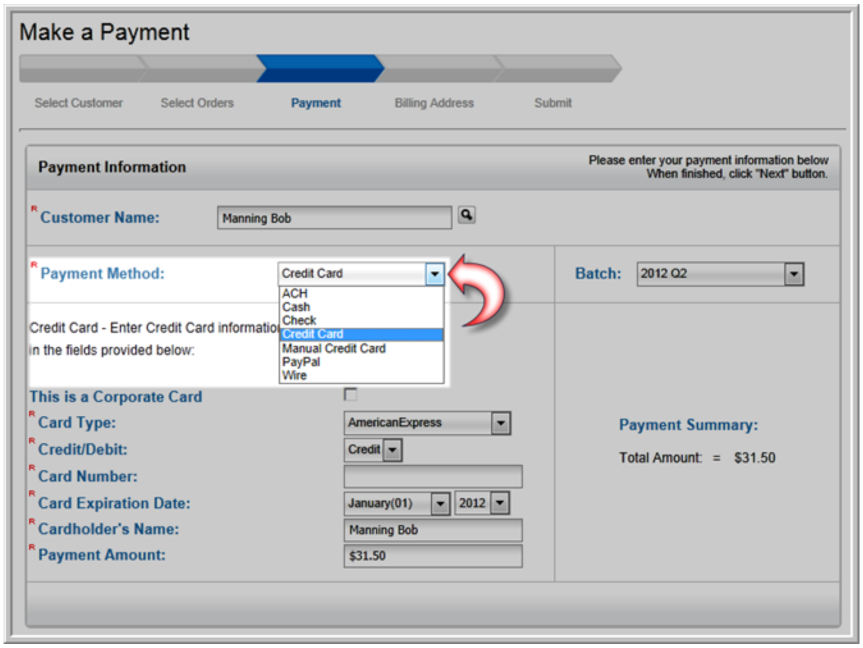
The **Mail My Check** payment method is used when a buyer intends to send a check to the organization for a purchase that is made. This payment method is handled exactly like the Bill Me payment method in that an order is created with the full balance due. Once the check is received, a payment can be entered for this order and it can be closed (assuming the amount of the check was for the full balance or the order.)

Once enabled, the Mail My Check payment method will be available in the Payment Method drop-down menu used during the checkout process when shopping or adding a payment to an order/invoice in both iWeb and eWeb.



When the **Mail My Check** payment method is used, a message will be displayed that an order with a balance due is being created for this transaction.

When making a payment on the order that is created by using the **Mail My Check** payment method, notice that **Mail My Check** and **Bill Me** are not available as methods of payment. You must choose a different method of payment when paying down the balance for this order/invoice.



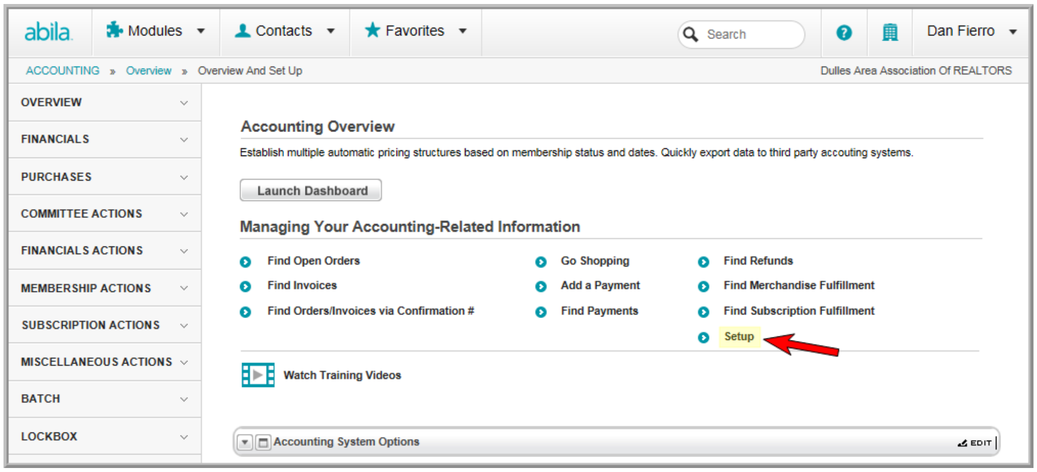
Setting Up Banks for Multi-Cash Accounts

netFORUM Pro allows realtors to set up multiple **Banks** to handle money distribution and tracking in multi-cash accounts. Multi-cash accounts may be necessary in netFORUM Pro if funds should be separate in the association's general ledger.

Setting up Banks is also needed in order to distribute collected funds among an association's bank accounts, to NAR, and/or the state for dues.

To set up a Bank:

1. Log into netFORUM Pro.
2. Hover over the **Modules** tab located along the top navigation bar and click **Accounting** to launch the **Accounting** module.
3. Click the **Setup** icon.



This will launch the **Accounting Information** page.

4. Click the **+Add** link located on the **Banks and Asset Cash** line item of the **Accounting Information** page.

This will open the **Bank and Asset Cash Information** form.

5. Enter the **ID** for this **Bank** in the **BankID** field. This field is required.

   This field is required and the value entered here will be used in the **Bank ID** drop-down menu used for **Charge Code** creation and eCommerce fund distribution.
6. Enter the **code** for this **Bank** in the **Bank Code** field. This field is required. A **Bank Code** may be set up for local dues.
7. Enter the **description** for this **Bank** in the **Bank Description** field.
8. Enter the **cash account** to be used for payments applied to this **Bank** in the **Cash Account** field.

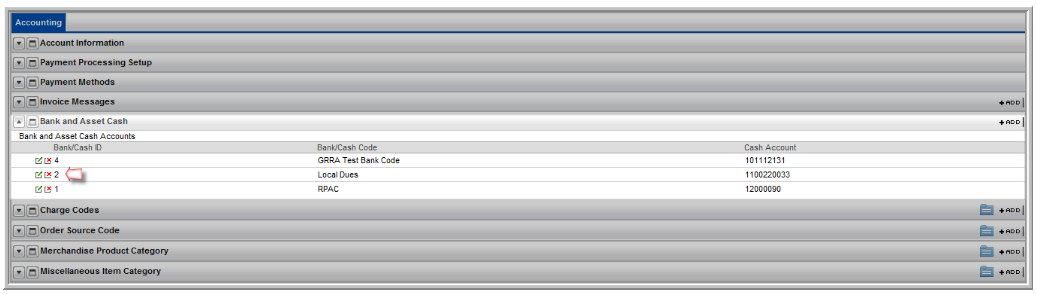
   If you do not specify a **Cash Account**, the default cash account specified during the initial **Account Information** setup will be used. To see what the default cash account is, expand the **Account Information** child form. The default cash account is listed under the **Cash Account** heading.

9. Click the **Save** button.

   The **Bank Information** form will close and you will be viewing the **Account Information** page again.

10. Click the expand icon on the **Banks** line item of the **Account Information** page to display the **Banks** child form.

    This will display a list of all the **Banks** that have been added to this entity.



Once a **Bank** has been setup, it can be selected during **Charge Code** setup.

After setting up **Banks** in multi-cash accounts, you will be able to see the breakout to cash accounts when viewing a **Batch GL Details** child form.

Setting up Charge Codes for Automatic Dues Distribution

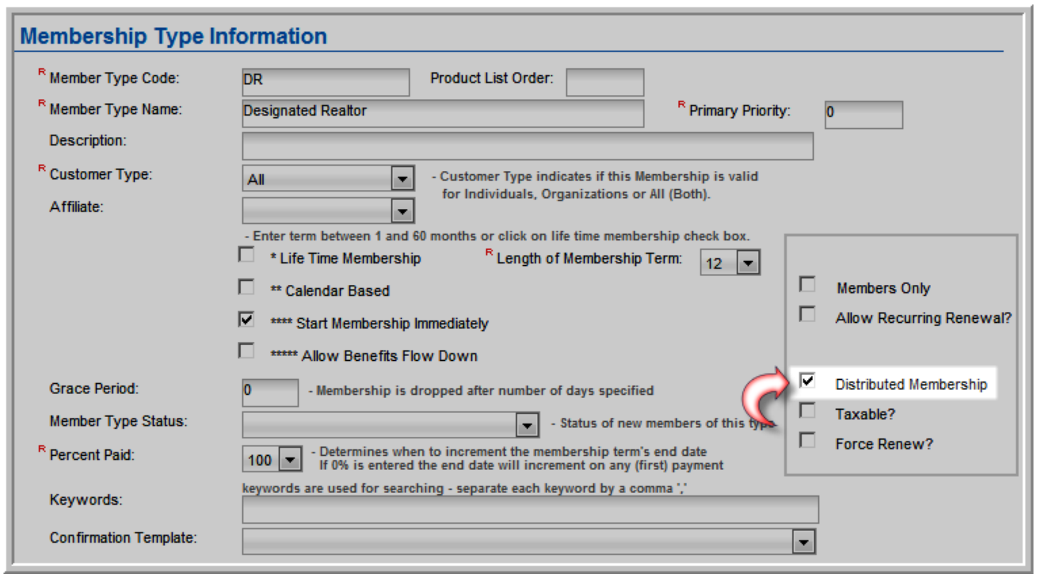
Many times when dues are collected for Real Estate associations they are distributed between several different associations. For example, the Local Association might collect membership dues with a portion going to the State Association and yet another portion going to the National Association of Realtors®. This is easily accomplished in netFORUM Pro for Real Estate Associations with the correct amounts transferred to NRDS and a General Ledger balanced with the correct Accounting and Charge Codes set-up.

The steps to collecting and distributing dues include:

1. Obtain the Realtor ID and Bank IDs for each association needed to which to distribute the dues. In the example above, both are needed for the Local, State, and National Real Estate associations.

Note: Use Realtor.org as the payment processor to have seamless deposit of funds to the realtor banks specified in set up.

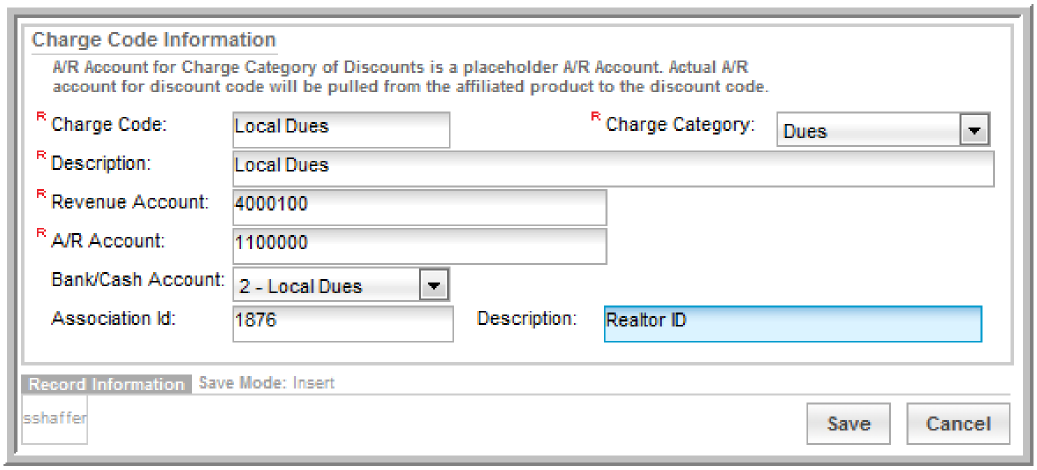
2. Set-up the charge codes needed using the **Realtor ID** and **Bank ID** obtained.
3. Use the charge codes set up to distribute the Membership Dues through NRDS ecommerce.
4. The **Distributed Membership** checkbox must also be checked on the **Membership Type Information** form (located in the Member Type Profile.)


Membership Type Information
R Member Type Code: DR Product List Order:
R Member Type Name: Designated Realtor R Primary Priority: 0
Description:
R Customer Type: All - Customer Type indicates if this Membership is valid for Individuals, Organizations or All (Both).
Affiliate:
- Enter term between 1 and 60 months or click on life time membership check box.
* Life Time Membership R Length of Membership Term: 12
** Calendar Based
**** Start Membership Immediately
***** Allow Benefits Flow Down
Members Only
Allow Recurring Renewal?
Distributed Membership
Taxable?
Force Renew?
Grace Period: 0 - Membership is dropped after number of days specified
Member Type Status: - Status of new members of this type
R Percent Paid: 100 - Determines when to increment the membership term's end date If 0% is entered the end date will increment on any (first) payment
Keywords: keywords are used for searching - separate each keyword by a comma ','
Confirmation Template:

Failing to check the **Distributed Membership** checkbox will prevent fee distribution to the charge codes that have been set up.

Charge codes in netFORUM Pro are used to track accounting transactions. Generally, charge codes are set up for Dues, Merchandise, Tax charges and so forth. View the netFORUM Pro Online Help topic on Charge Codes and Setting up Charge Codes for more information.

To add a new charge code in **Accounting** set-up, click the **Add** link. The **Charge Code Information** window appears.

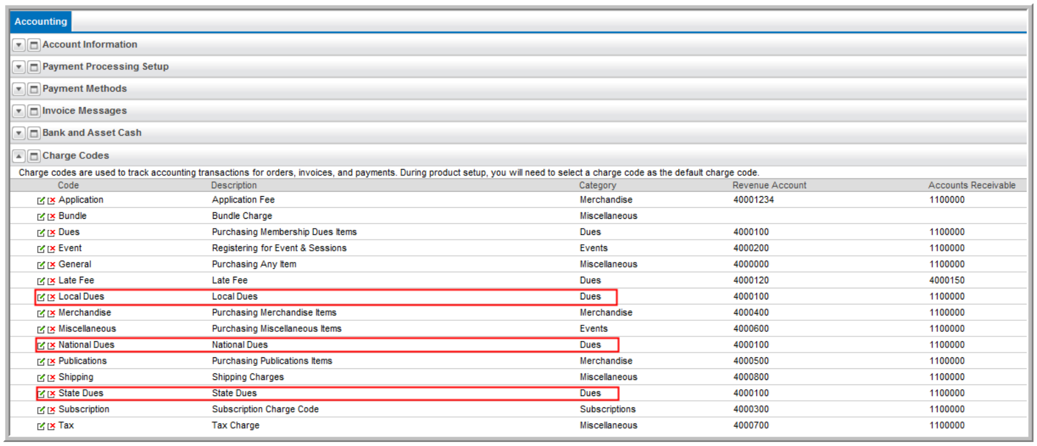


Two fields have been added to this window to support Real Estate Associations; the **Association ID** and the **Bank ID** fields.

Association ID: Use this field to input the Realtor ID for the distribution set up. In the example above, the local dues are being set up for the Local Association of Realtors. After it is saved, an additional charge code will need to be added for the State and National associations. Each of their Realtor IDs should be added respectively in their Association ID fields. This ensures the funds will be distributed accordingly to NDRS as specified.

Bank ID: Select the the **Bank ID** of each association that will be used from the **Bank ID** drop-down menu. The values listed in this drop-down menu are obtained from the list of Banks that have been previously set up. If the Bank IDs don't display, set them up following the steps outlined in the **Setting Up Banks for Multi-Cash Accounts**.

For each association to which to distribute dues, create a corresponding Charge Code with a Realtor ID and Bank IDs selected as described above. Using the Local, State, and National examples, the Charge Codes in Accounting setup would eventually look similar to the image below.



Accounting

Account Information

Payment Processing Setup

Payment Methods

Invoice Messages

Bank and Asset Cash

Charge Codes

Charge codes are used to track accounting transactions for orders, invoices, and payments. During product setup, you will need to select a charge code as the default charge code.

Code	Description	Category	Revenue Account	Accounts Receivable
Application	Application Fee	Merchandise	40001234	1100000
Bundle	Bundle Charge	Miscellaneous		
Dues	Purchasing Membership Dues Items	Dues	4000100	1100000
Event	Registering for Event & Sessions	Events	4000200	1100000
General	Purchasing Any Item	Miscellaneous	4000000	1100000
Late Fee	Late Fee	Dues	4000120	4000150
Local Dues	Local Dues	Dues	4000100	1100000
Merchandise	Purchasing Merchandise Items	Merchandise	4000400	1100000
Miscellaneous	Purchasing Miscellaneous Items	Events	4000600	1100000
National Dues	National Dues	Dues	4000100	1100000
Publications	Purchasing Publications Items	Merchandise	4000500	1100000
Shipping	Shipping Charges	Miscellaneous	4000800	1100000
State Dues	State Dues	Dues	4000100	1100000
Subscription	Subscription Charge Code	Subscriptions	4000300	1100000
Tax	Tax Charge	Miscellaneous	4000700	1100000

When setting up charge codes, the NAR is always assigned Association ID 1. Since the NAR only has one bank, do not need to include a bank parameter for the Bank ID on the NAR charge code.

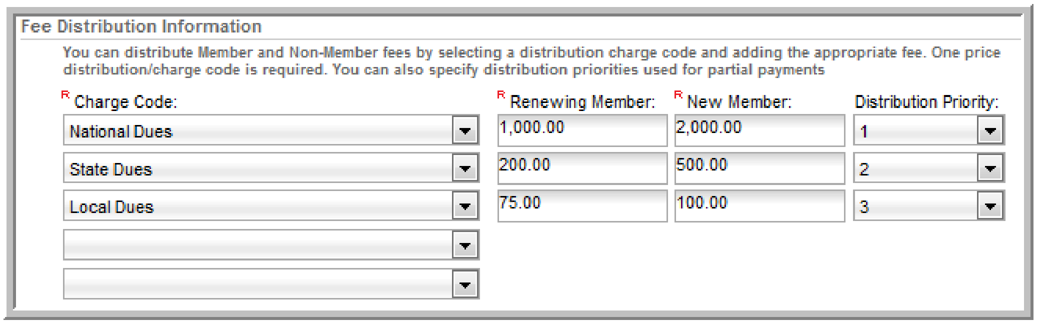
In addition, most state associations will also only have one bank and will not need a Bank ID assigned (as the default Bank ID will suffice.) However, it is still important for the local associations to check with NAR to confirm that their state only has one Bank ID. In cases where states have multiple Bank IDs assigned, the local associations should check with the state association to determine to which Bank ID the state would like the membership funds directed.

Note: When a specific Bank ID is not supplied when setting up a charge code, funds collected from that charge code will be directed to the default Bank ID for that association.

Once the Charge Code is set up correctly, they are easily distributed.

To distribute your dues automatically:

1. Go to the **Member Type** profile.
2. On the **Dues Rate** tab, click the **Add** link to add dues.
3. Complete the dues information by creating a name and price; however, notice that the **Charge Code** drop-down allows selecting only one at first when distributing dues. For now, select only one of the Charge Codes created and click **Save**.
4. **Edit** the **Dues Rate** to distribute dues to the rest of the **Charge Codes** created.
5. Click the **Edit** button and notice the **Fee Distribution Information** section, seen below. Using this section, break down how much of the fee should go to each association's charge code which is tied directly to NDRS through the IDs set up.



6. Use the drop-down menus in the **Fee Distribution Information** section to distribute the dues rate. The totals must not exceed the total seen in the **Member Fee** fields in the **Fee Information** section. Set a **Distribution Priority** to receive partial payments and to dictate which association receives priority.

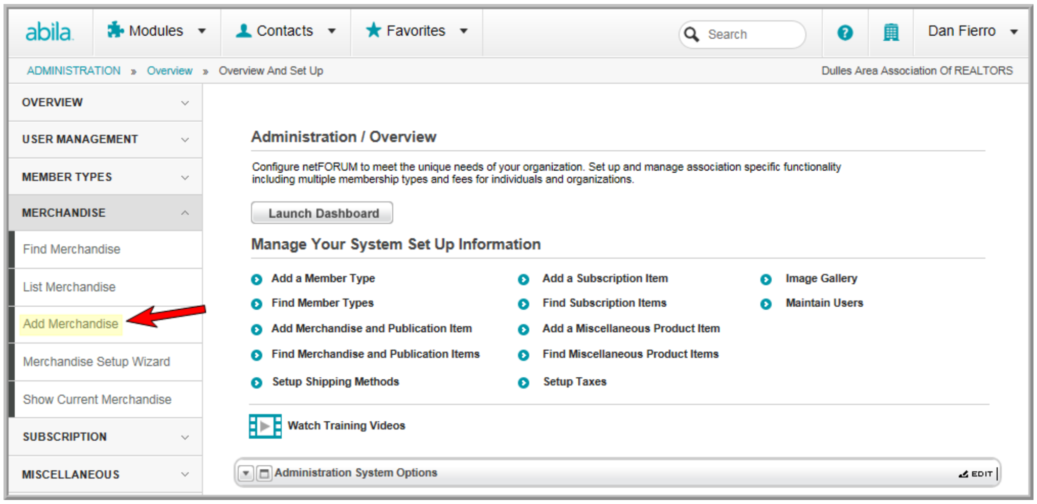
Using the combination of **Accounting Charge Code** set-up and **Member Type** set-up ensures that data is sent accurately to NDRS and that the General Ledger reconciles efficiently as well because codes are clearly labeled.

Setting Up Products for Ecommerce Distribution

In addition to membership dues, all other product types sold from a netFORUM Pro for Real Estate Associations entity can be distributed to multiple banks. The setup process for enabling other products for distribution is nearly identical to the steps listed in Setting Up Charge Codes for Automatic Dues Distribution.

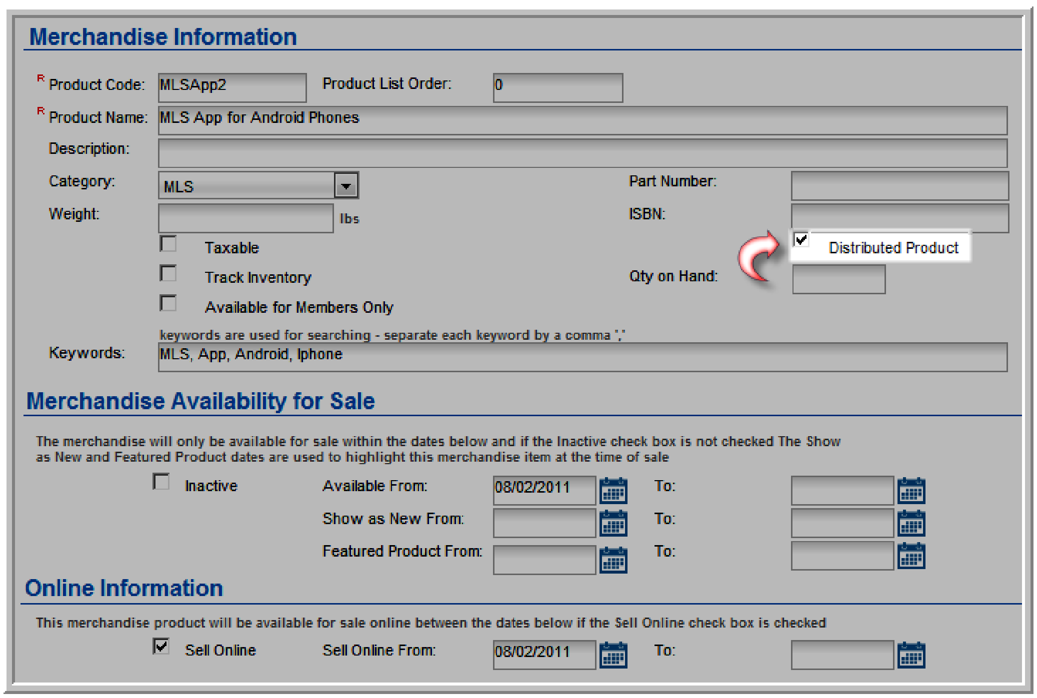
To enable a product for ecommerce distribution:

1. Complete the steps listed for "Setting up Charge Codes for Automatic Dues Distribution" (page 31).
2. Hover over the **Modules** tab located along the top navigation bar and click **Administration**.
3. Click the **Merchandise** menu item located on the left and click the **Add Merchandise** link.



5. Complete the steps for adding new merchandise as outlined in the Setting Up Merchandise help topic.

6. Click the **Distributed Product** checkbox.



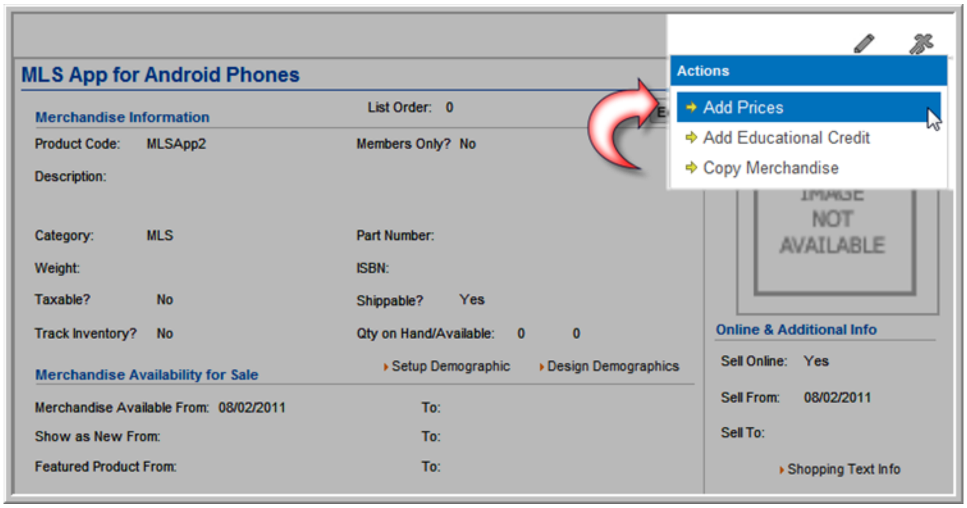
Clicking this checkbox will enable this product to have its fees distributed among the various bank accounts set up earlier.

In addition, if the fees for this product will be credited to any bank account **other than the default** bank account set up for this entity, check the **Distributed Product** checkbox. Failing to check this checkbox will automatically deposit all of the fees collected for this product in the default bank account.

7. After all of the information needed for the new product is entered, click the **Save** button.

   This will open the product profile page for the newly created product.

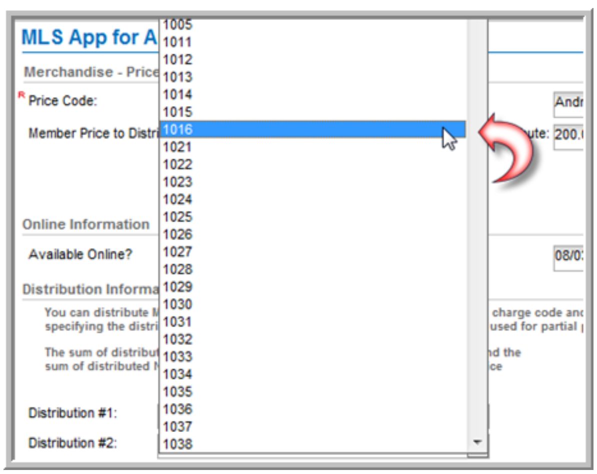
8. Mouse over the **Actions** icon to expand the **Actions** fly-out menu.



9. Click the **Add Prices** option.

10. Complete the steps outlined in the Adding a Price for Merchandise help topic.

11. Expand the **Charge Code** drop-down menu next to the **Distribution #1** field to see a list of charge codes available for distribution.



This list will display a list of the charge codes set up during Step 1 of this process.

Tip: Associate a Bank ID to the selected charge code in order for the correct bank distribution to occur. Review "Setting up Charge Codes for Automatic Dues Distribution" (page 31) for full details.

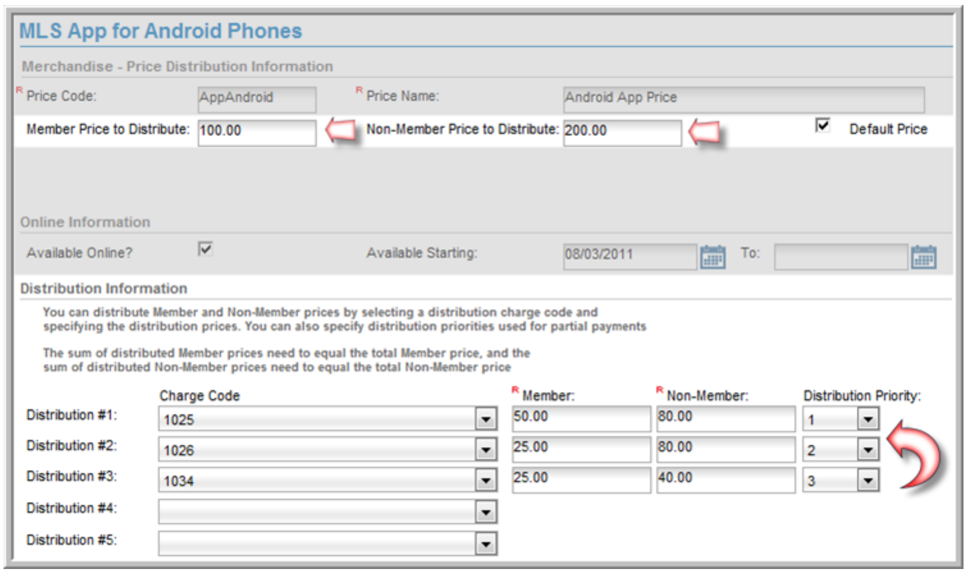
12. Select the desired charge code for **Distribution #1**.

13. Continue to repeat steps 11 and 12 for each distribution you wish to enable for this product.

    When selecting a **Charge Code**, a corresponding **Member** and **Non-Member** price distribution field will appear, along with a **Distribution Priority** drop-down for each.

14. Enter the portion of the total price for both the **Member** and **Non-Member** prices for distribution to each charge code.

    Tip: The sum of the price distributions in the **Member** column and **Non-Member** column must equal the total price for that price classification. For example, if your **MemberPrice to Distribute** (price) for this product is $100.00, the sum of all the **Member** distributions you allot must equal $100.00.



Notice in the screenshot above that the distributed prices in the **Member** column and **Non-Member** column total their respective (**Member Price to Distribute** and **Non-Member Price to Distribute**) values set earlier on the form.

15. Expand the **DistributionPriority** drop-down menu next to each **Distribution** option and choose the priority for each.

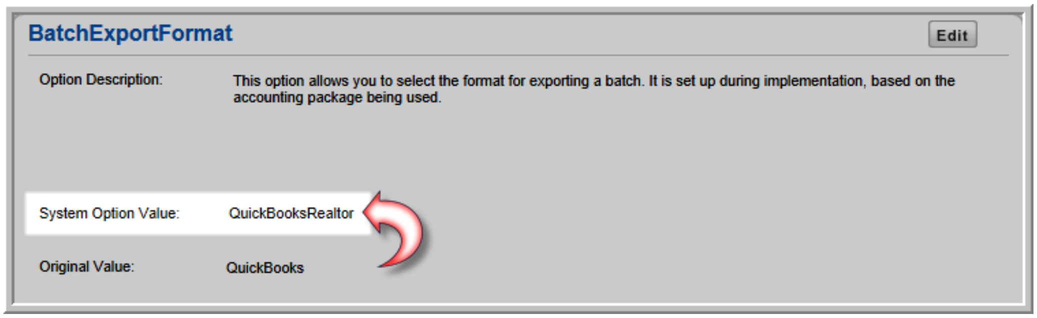
16. Click the **Save** button.

Tip: Remember, leaving the **Distributed Product** checkbox unchecked will apply 100% of the fees for the product to the default bank account for the entity.

QuickBooks for Realtors

The Realtor version of the QuickBooks export allows certain charge codes to be excluded from a general QuickBooks export. This is particularly useful for those charge codes where an association is collecting the money but distributing it through the NRDS ecommerce bank IDs to NAR and the state association.

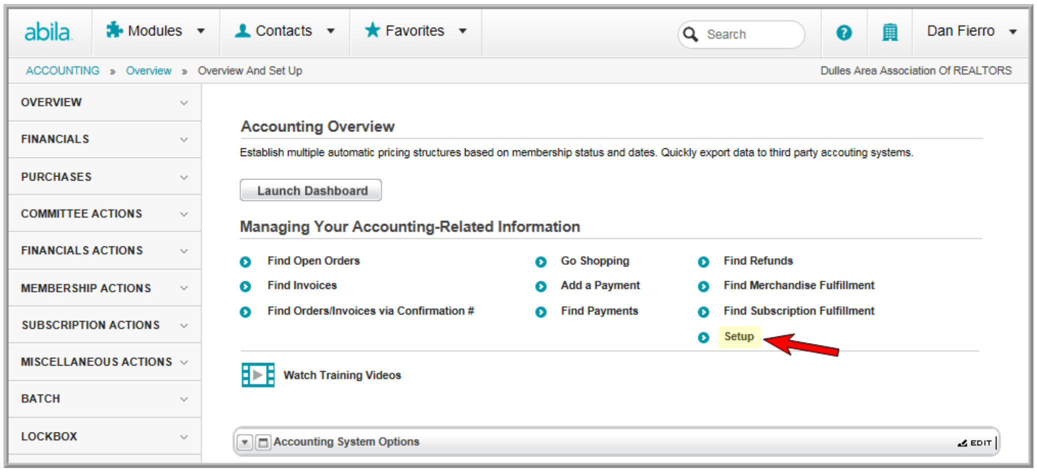
To use the Realtor version of the QuickBooks export, the **Batchexportformat** system option must be set to **QuickbooksRealtor**.



Setting this value for this system option enables excluding charge codes selected from a QuickBooks export.

To use the QuickBooks for Realtors feature:

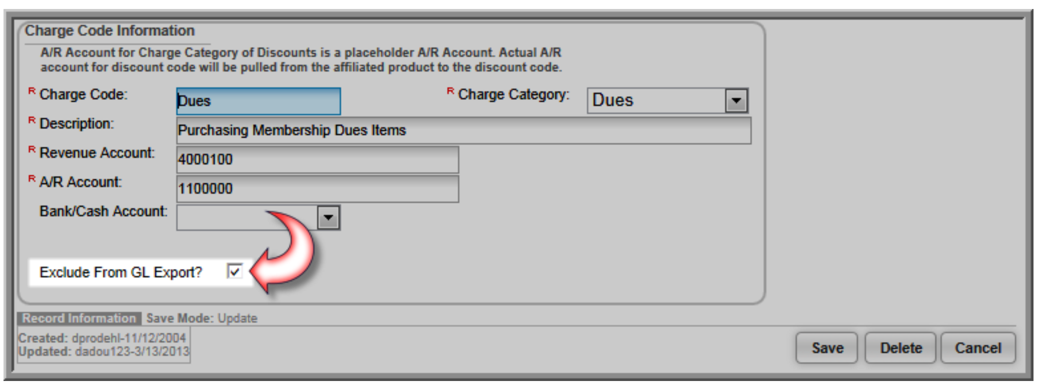
1. Set the **BatchExportFormat** system option value to **QuickBooksRealtor**.
2. Hover over the **Modules** tab located along the top navigation bar and click **Accounting** to open the **Accounting Overview** page.
3. Click the **Setup** hyperlink to open the **Accounting Setup** page.



4. Expand the **Charge Codes** child form and locate the first charge code you wish to exclude from your GL export.

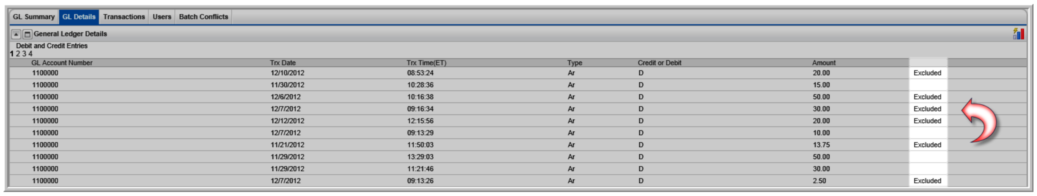
5. Click the **Edit** icon next to that charge code to open the **Charge Code** Information pop-up window.

6. Click the **Exclude from GL Export?** check box.



7. Click the **Save** button. Going forward, this charge code will be excluded from all GL Exports, however it will still exist in the netFORUM Pro ledger history on the batch profile.

8. To view the ledger history, open a batch profile and expand the **General Ledger Details** child form which is nested under the **GL Details** tab.



Those charge codes that have been excluded from the GL Export will have **Excluded** listed in the far-right column on the General Ledger Details child form.

To include those charge codes in the GL Export that have previously been excluded, simply edit that charge code (following the steps listed above) and deselect the **Exclude from GL Export?** check box. This will include that charge code in the next GL Export as well as remove the **Excluded** tag from its line item on the General Ledger Details child form.

Quickbooks for Realtors works for both manual and automatic batches, however the batch must be processed first.

Memberships and Subscriptions

Memberships and subscriptions are managed with:

- "Supplemental Memberships" (page 41)
- "Membership Status Updates" (page 44)
- "Recurring Membership Renewals" (page 47)
- "Viewing Additional Details for Memberships on eWeb My Transactions" (page 52)
- "Promoting a Subscription" (page 53)
- "Subscription and Subscription Status Price Qualifiers" (page 54)

Supplemental Memberships

Supplemental memberships (also known as secondary memberships) are those memberships that members hold in local realtor associations that are different than their primary board. These supplemental memberships are attached to their individual profiles in NRDS, but are not managed by an association.

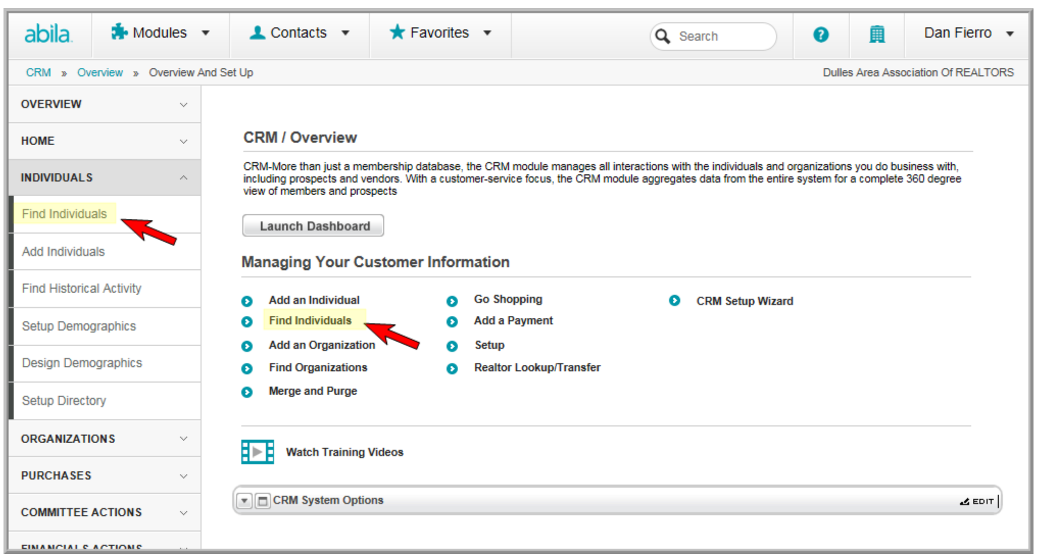
netFORUM Pro for Real Estate Associations has the capability to manage this data at the time of entity creation. A Data Import Specialist will convert the supplemental membership data into this supplemental membership form.

Supplemental membership data will also be updated via the NRDS data transfer. The rules for pulling the supplemental membership data are based on the NAR's point of entry rules. This data is **only available inside** netFORUM Pro for Real Estate Associations and **is not** displayed on the eWeb site in the Membership area.

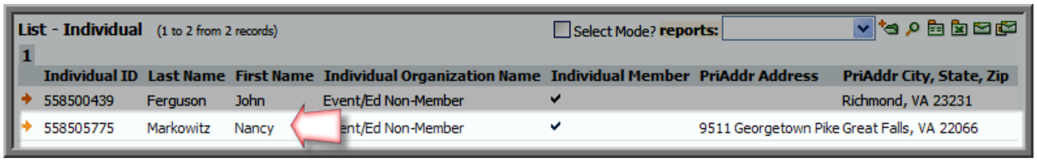
In addition, when a realtor purchases a membership and their Primary Board ID is different from the Entity Realtor ID it is categorized as a supplemental membership. Once this supplemental membership is purchased, netFORUM Pro for Real Estate Associations will push this new supplemental membership data to NRDS. Once it is pushed to NRDS, it will be available in the NRDS pull queue.

To view the supplemental membership data for a member:

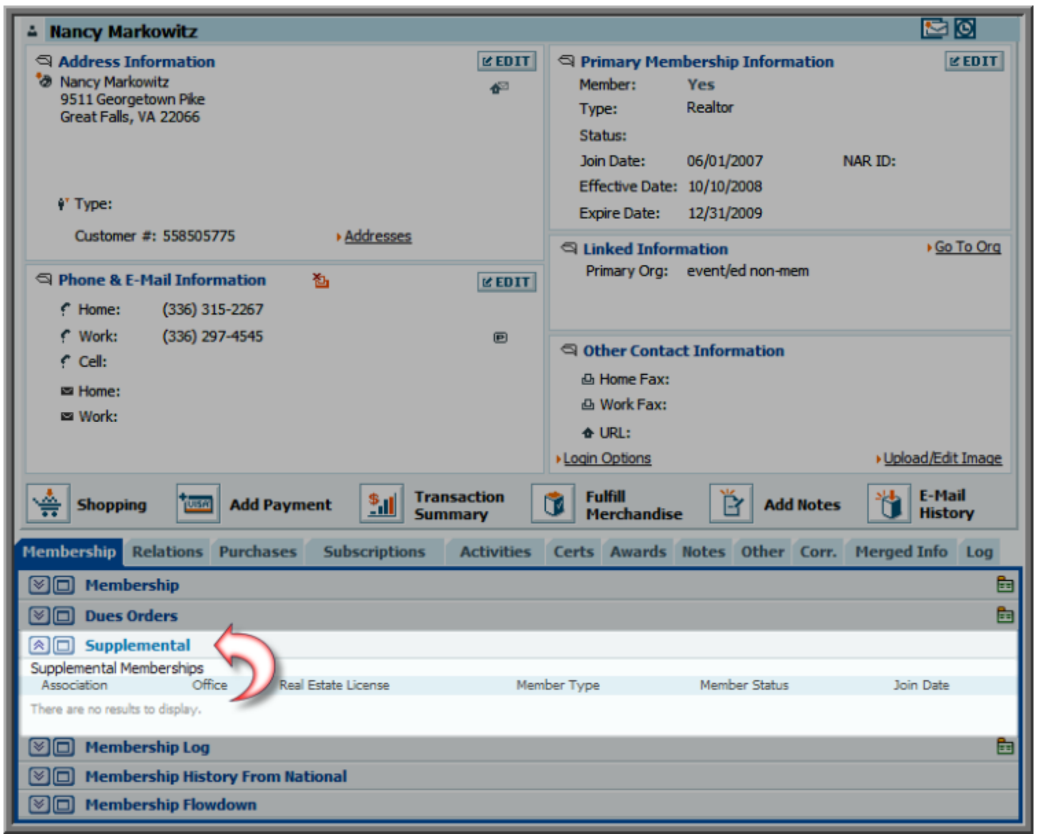
1. Hover over the **Modules** tab located along the top navigation bar and click **CRM**.
2. Click the **Individuals** menu item on the left and click the **Find Individuals** link or click the **Find Individuals** link on the main page.



3. Search for the member whose data is to be examined.
4. Open that members profile by clicking on their hyperlinked name in the search results list.



5. Click on the **Memberships** tab located below basic member information section of the profile form.
6. Expand the **Supplemental** section by clicking on the expand icon.



Expanding the **Supplemental** section will list all of the supplemental memberships held for the individual being examined. However, as said previously, **this information is only visible within netFORUM Pro for Real Estate Associations and will not be visible in the Membership section of the eWeb site**.

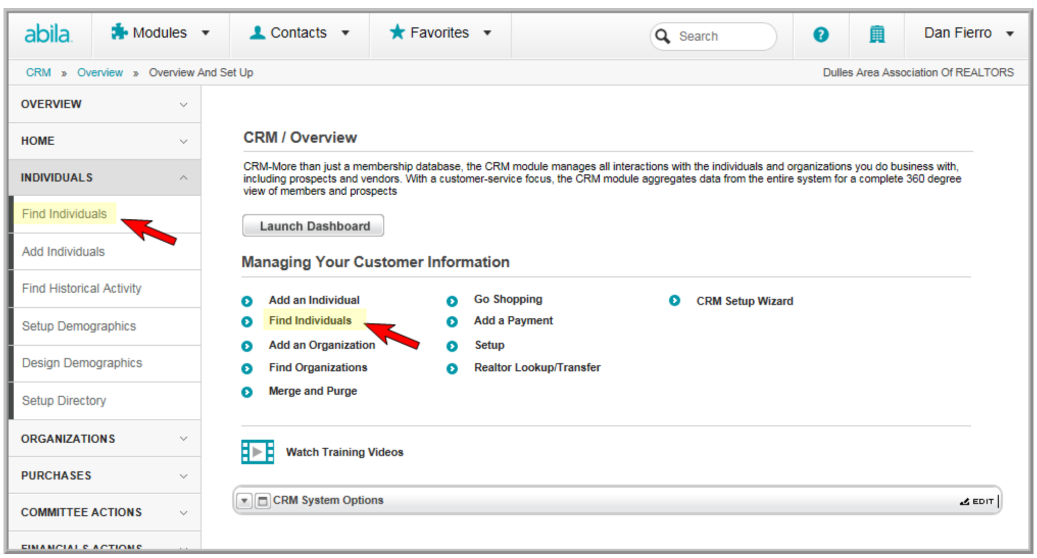
Membership Status Updates

netFORUM Pro for Real Estate Associations allows iWeb users to update the status of a realtor's Primary Board membership and have that membership transfer to their NAR Board membership status. However, in order for this status update to take place, both the **Primary Board ID** and the **EntityRealtor ID** must match.

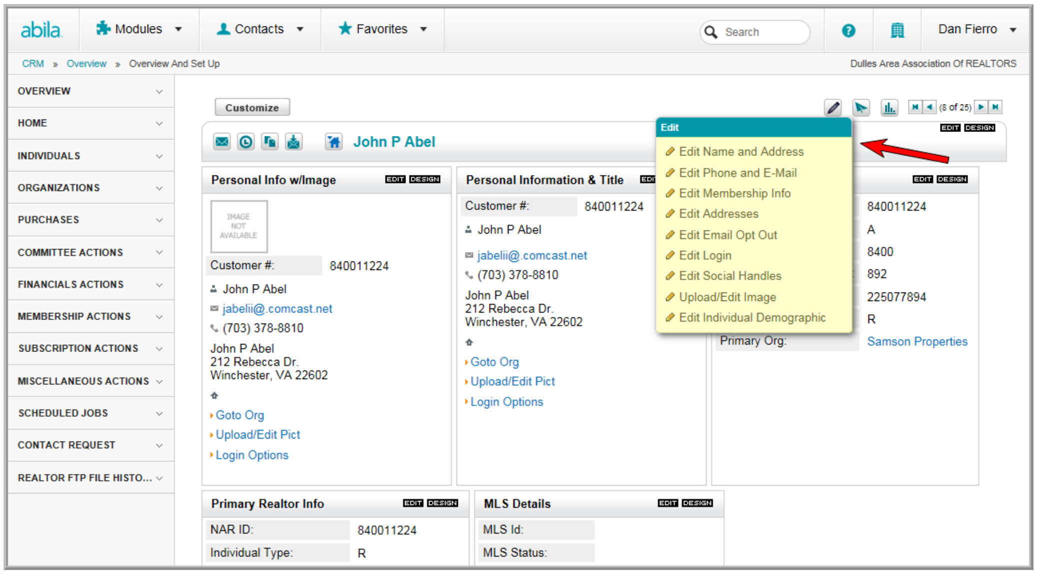
Member status can also be updated as part of a batch process.

To update the membership status for both the Primary Membership and the Primary NAR Board, assuming the Primary Board ID and the Entity Realtor ID match, complete the following steps:

1. Login to netFORUM Pro for Real Estate Associations.
2. Hover over the **Modules** tab located along the top navigation bar and click **CRM**.
3. Click the **Individuals** menu item on the left and click the **Find Individuals** link or click the **Find Individuals** link on the main page.

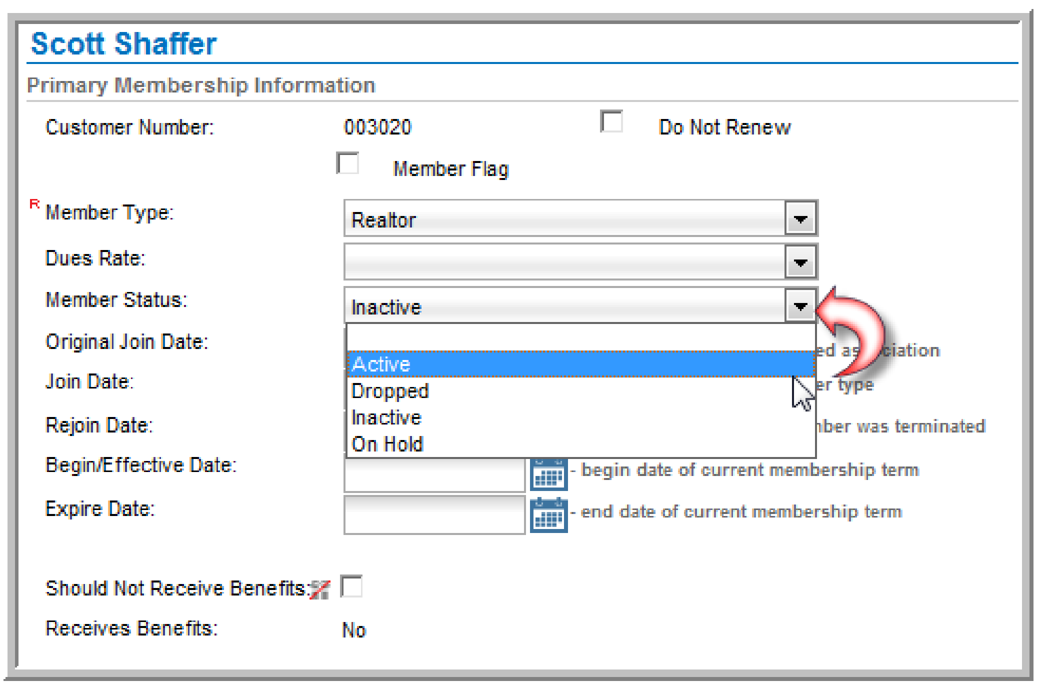


4. Locate a realtor whose status needs updating.
5. Open that realtor's profile page.
6. Click the **Edit** pencil button located in the realtor profile.

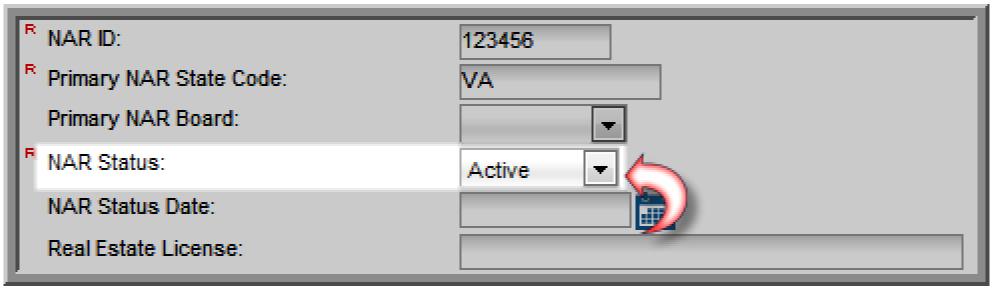


Open the desired Edit menu item to get to the desired form. For the example below select **Edit Membership Info**.

5. Select the status to set for both the realtor's Primary Membership status and NAR Primary Board status from the **Member Status** drop-down menu.



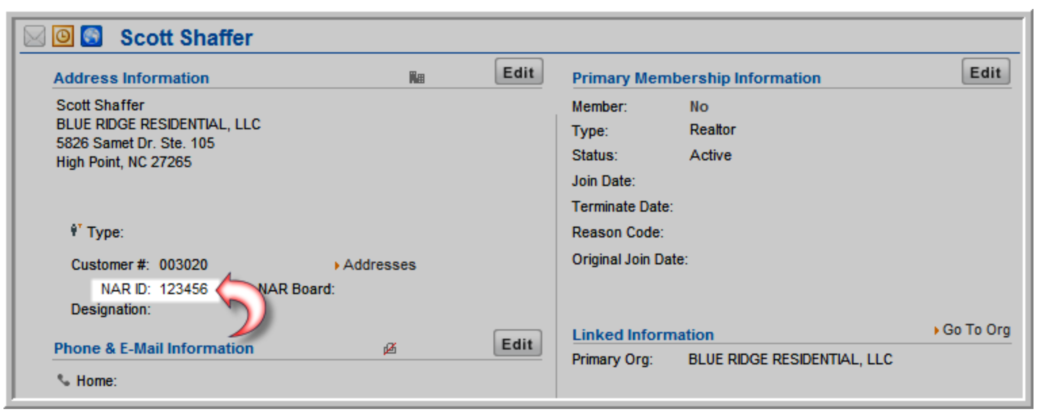
6. Click the **Save** button. The **Member Status** for the realtor's Primary Membership updates and returns to the full realtor profile.
7. Click on the **Edit** button in the **Address Information** section of the Realtor Profile.
8. Scroll down to view the **NAR Status** field and notice it has been updated to match the **Primary Membership Status** set above.



Important: This status update will only occur if the Realtor ID AND the Primary Board ID match. If these do not match the Primary Membership status change will not affect the realtor's NAR Board status.

An easy way to see if these ID's match is to click the **Edit** button in the **Address Information** section of the Realtor Profile and look at the realtor's **Primary NAR Board ID**.

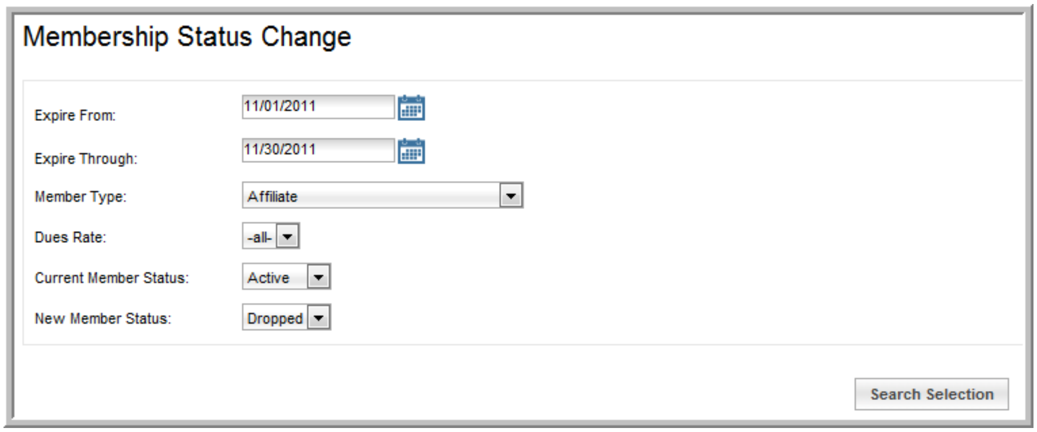
Then look at the full realtor profile and examine the **NAR ID** listed in the **Primary Membership Information** portion of the Realtor Profile to see the first four digits of that ID number matching the **Primary NAR Board ID**.



If those first four numbers do not match the **Primary NAR Board ID** examined earlier, this status update will only affect the realtor's Primary Membership and not their NAR Board Membership status.

Updating Member Status Using a Batch Process

Update several realtor's member statuses at once using the **Change MembershipStatus** batch process found in the **Actions** tab in the **CRM** module.



Running a batch (such as the example above) will process the member status for the list of individuals who are returned from this query whose **Primary Board ID** and the **EntityRealtor ID** match.

Those individuals whose **Primary Board ID** does not match the **EntityRealtor ID** will not have their statuses changed.

Recurring Membership Renewals

Memberships can be set to be recurring when setting up a Member Type in netFORUM Pro for Realtors. This allows individuals to purchase a membership and select to have it automatically renew at the end of each membership period. In order to process a recurring membership, three steps must occur:

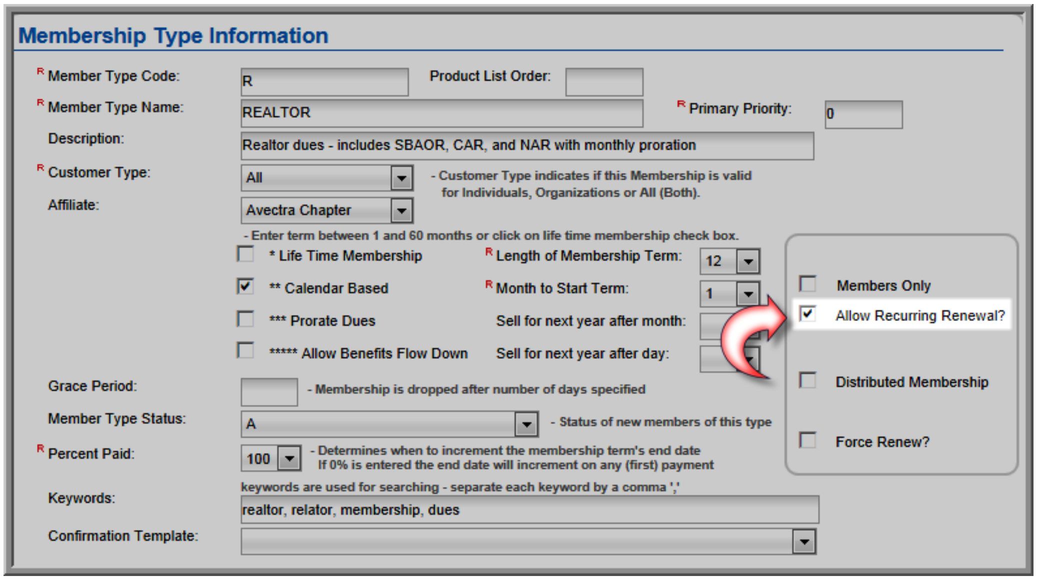
- The membership must be set to recurring
- The member must purchase the membership and authorize the recurring purchase/renewal
- The automatic renewal must be processed in netFORUM Pro.

Recurring renewals use NRDS E-Commerce as the payment processor.

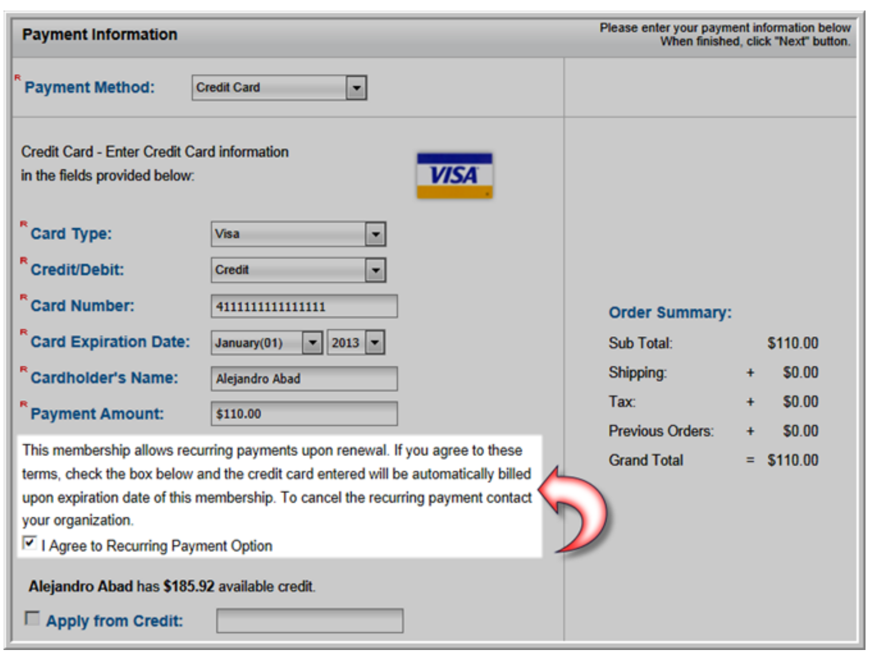
Setting up the Member Type for Recurring Memberships

Before a membership can be purchased and set to automatically recur, it must be enabled to do so. To set up a **MemberType** to allow for recurring renewals, check the **AllowRecurringRenewal?** check box.

Tip: The AllowAutoRenewRecurringBilling system option must be enabled in order to see the Allow Recurring Renewal? check box. Contact Abila Support to have this system option enabled.



Clicking this check box will present members who visit the Online Store to renew their membership with the option to select a check box that will automatically renew their membership without their interaction with the system.



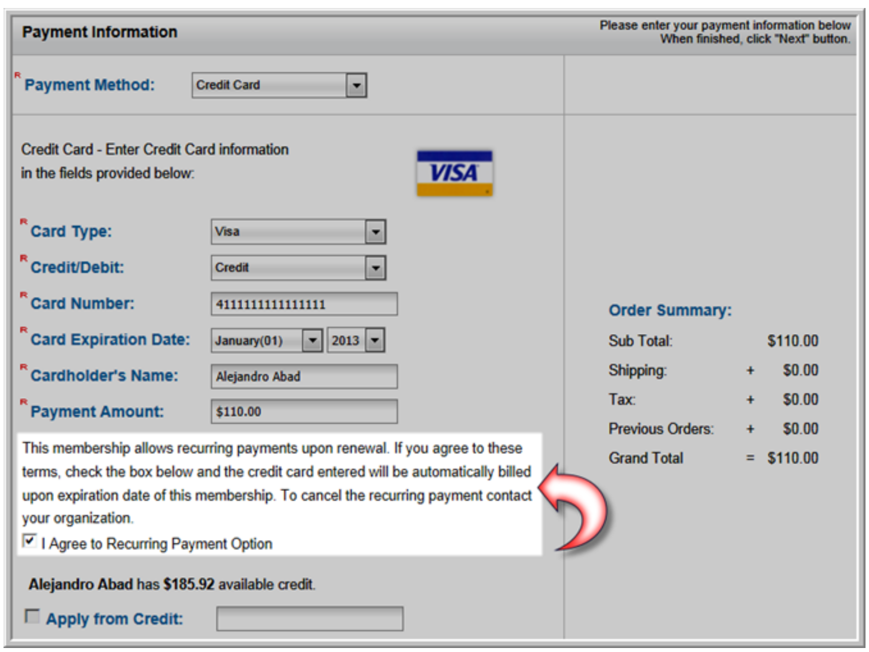
However, only individuals who are current, active members of that member type and who are purchasing their renewal with a credit card will see this check box. Individuals will not see this check box when they are first purchasing a new membership - it is only visible upon renewal.)

Authorizing the Recurring Membership Renewal

Once the Member Type has been set up to allow for recurring renewals, any individual who meets the following criteria will have the option to enable their membership to automatically be renewed without their involvement:

- Must be a current, active member of that Member Type
- Must be purchasing their renewal with a credit card.

When an individual meets the above criteria and visits their site's Online Store to purchase a membership renewal they will be presented with the option to authorize a recurring payment for their membership renewals going forward - for this same Member Type.



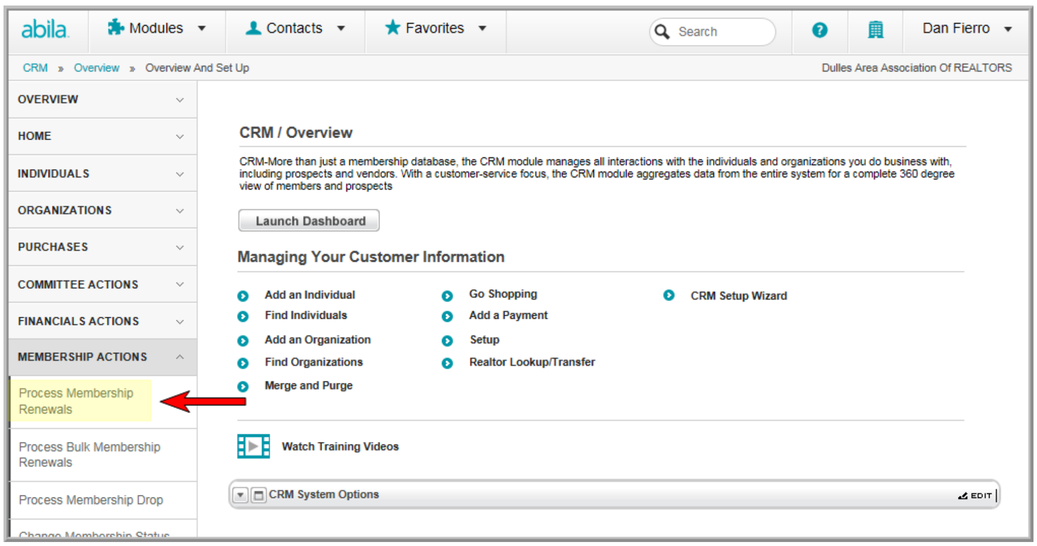
As long as the Member Type remains the same, this automatic renewal will continue regardless of the fees for that membership renewal. If at any time an individual wants or needs to cancel the automatic membership renewal they will need to contact their association.

Processing the Automatic Membership Renewal

Once Dues Orders are created through the membership renewal process, a second batch process must occur for those member types that allow recurring payments. The NRDS E-Commerce Profiles must also be processed so that the amounts that have paid in NRDS E-Commerce can be applied to the open Dues orders created to obtain that revenue.

To batch process NRDS E-Commerce Recurring Profiles:

1. Hover over the Modules tab in the top navigation bar. in the fly out menu, click **CRM**.
2. Expand the **Membership Actions** item and click **Process Membership Renewals**.

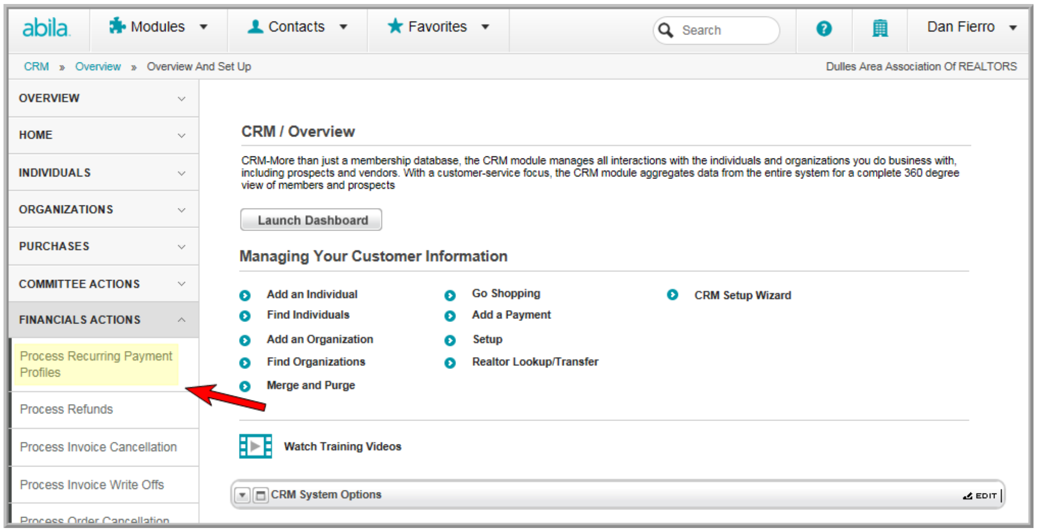


Complete the normal renewal process by clicking the **Process Membership Renewals** link to create the open Dues Orders.

Tip: In order to process the automatic membership renewal, a dues order must exist for that Member Type.

4. Once the open Dues Orders have been created, expand the **Financials Actions** item and click **Process Recurring Payment Profiles**.

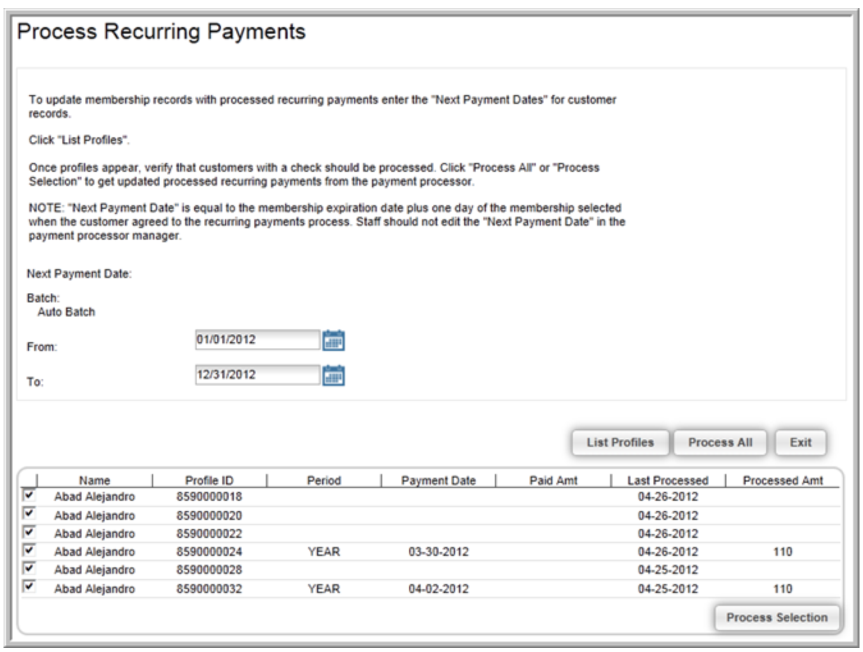
Note: If the **Process Recurring Payment Profiles** link is not available, contact Abila Support to have the system option activated.



The **Process Recurring Payments** window appears.

To see a list of all profiles meeting a set of criteria, enter the desired criteria and click the **List Profiles** button.

5. Click the check box next to the profile to be processed in this batch.



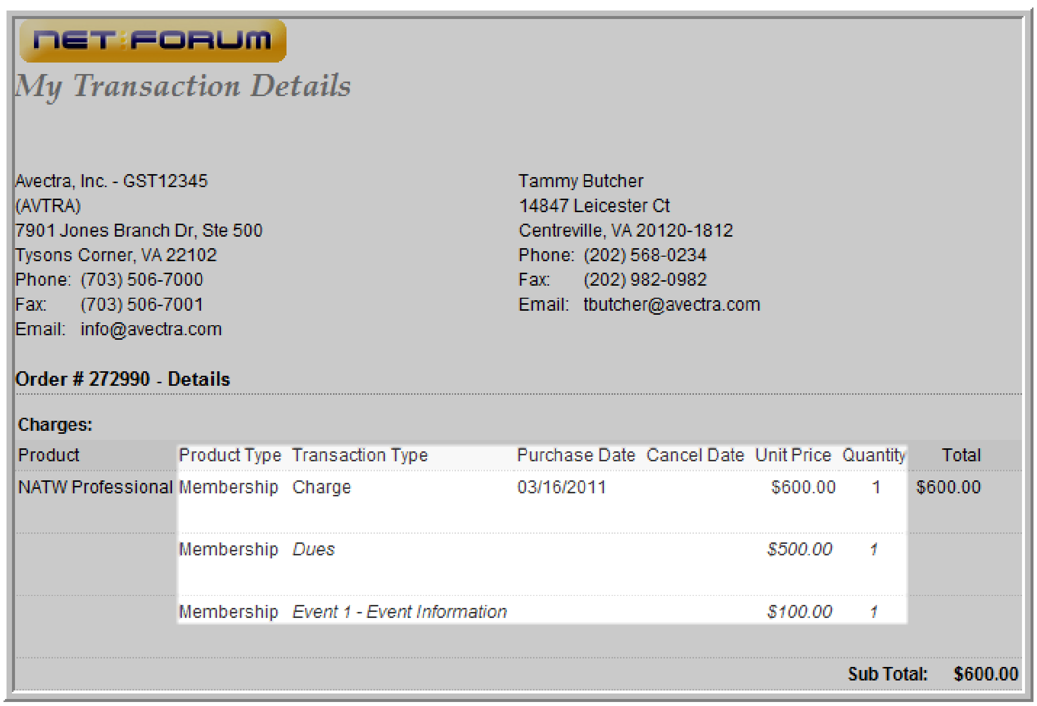
6. Click the **Process Selection** button to run the process.

A message is sent confirming that the selected profiles have been processed. This means that the payment was found and applied to the open order, an invoice was created for the member, and membership dates were updated. Note that when the accounting batches are closed, the appropriate accounts are credited with the renewals as well.

Viewing Additional Details for Memberships on eWeb My Transactions

Additional transaction details are now viewable for open orders on membership purchases that have distributions or multiple charge codes setup. This is helpful for those customers that desire a complete breakdown of charges on their open orders. Contact **Abila Support** to enable the **eWebOrderProfileTrxDetail** system option.

For example, notice that when the **My Transaction** page is accessed through **eWeb** in the screenshot below, the customer has an existing open order containing a membership transaction. Clicking or editing the open order will, as usual, prompt the **My Transaction Details** window.


NET FORUM

My Transaction Details

Avectra, Inc. - GST12345
(AVTRA)
7901 Jones Branch Dr, Ste 500
Tysons Corner, VA 22102
Phone: (703) 506-7000
Fax: (703) 506-7001
Email: info@avectra.com

Tammy Butcher
14847 Leicester Ct
Centreville, VA 20120-1812
Phone: (202) 568-0234
Fax: (202) 982-0982
Email: tbutcher@avectra.com

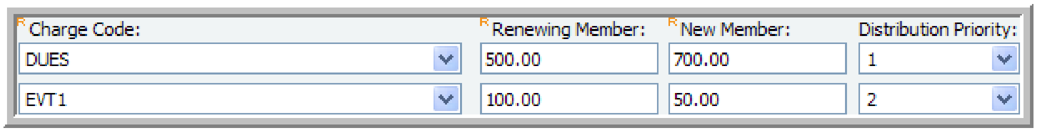
Order # 272990 - Details

Charges:

Product	Product Type	Transaction Type	Purchase Date	Cancel Date	Unit Price	Quantity	Total
NATW Professional	Membership	Charge	03/16/2011		$600.00	1	$600.00
	Membership	*Dues*			*$500.00*	*1*	
	Membership	*Event 1 - Event Information*			*$100.00*	*1*	

Sub Total: $600.00

The My Transaction Details page details the breakdown of membership distributions and charge codes, as seen above, on open orders. Notice that the NATW Professional membership has a distribution for membership dues and for an event included as part of its price code. This can be seen under the **Transaction Type** heading. This is only applicable for those member types that have dues rate with multiple distributions or charge codes set-up.



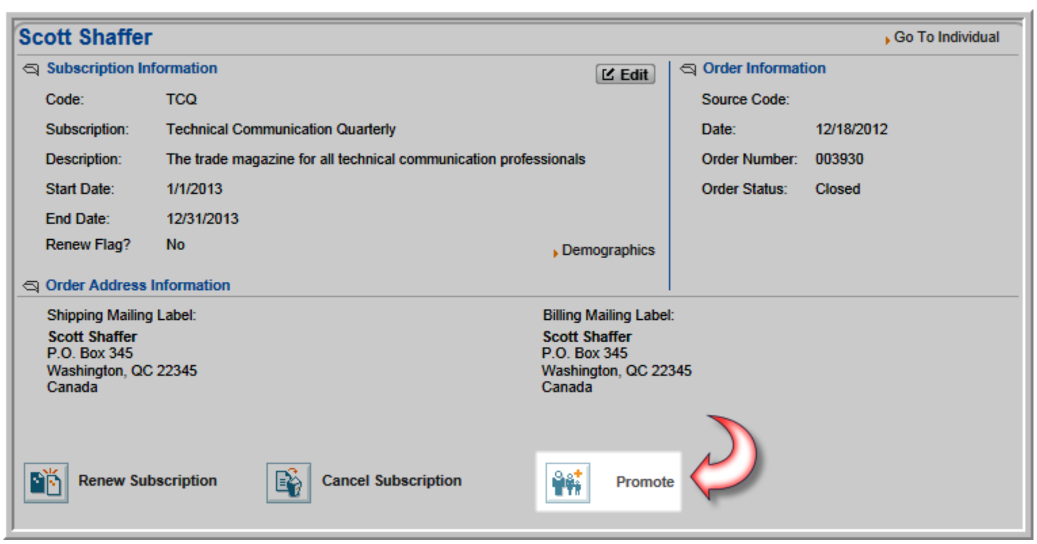
For users of the netFORUM Pro for Real Estate Associations, this feature will also breakdown and list a realtor's various memberships (national, state, local.)

Promoting a Subscription

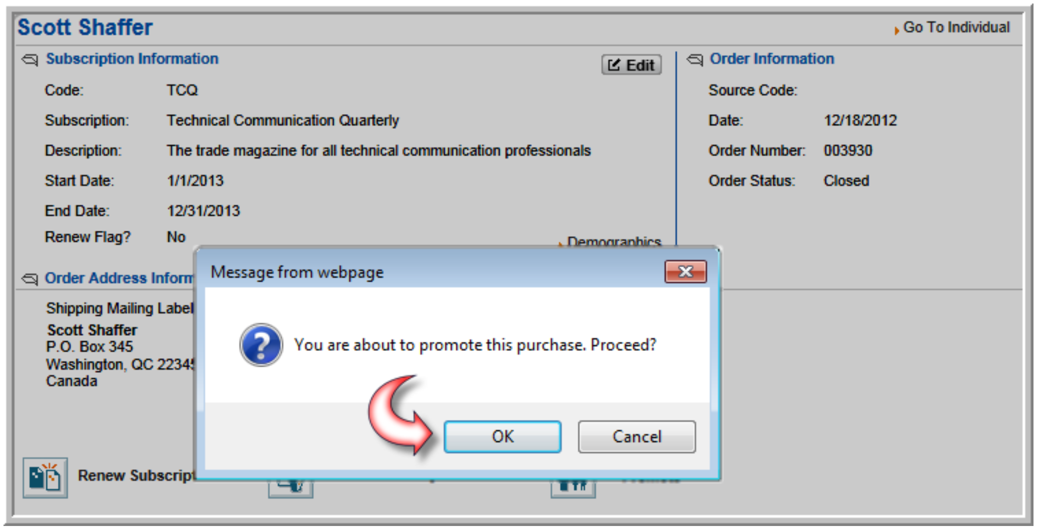
Promote a subscription that is paid in full and scheduled to renew in the future.

Subscriptions are promoted to start immediately by clicking the **Promote** icon available on the subscriber Purchase Profile.

Note: The subscription must be a purchased subscription and should not be a new subscription.



Clicking the **Promote** icon will display a confirmation pop-up asking you to confirm the promotion of this subscription. Click the **OK** button to complete this process.



The **Promote** icon will only appear on those subscriptions that have not been cancelled and are scheduled to start in the future.

Subscription and Subscription Status Price Qualifiers

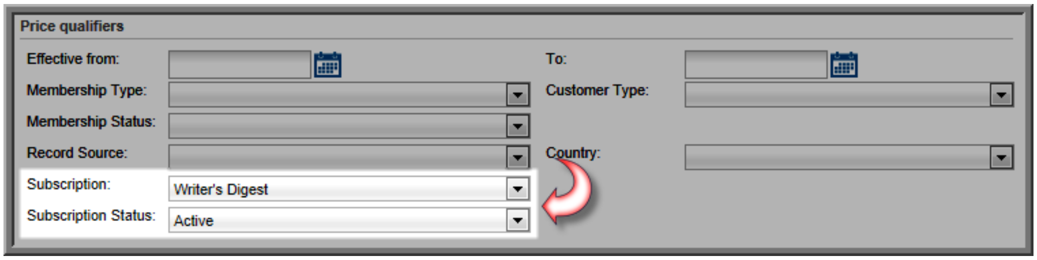
The **Subscription and Subscription Status Price Qualifiers** limit who can purchase a product at a special price based on a purchased subscription and the status of that subscription if desired. For example, when specifying that a customer must have a subscription to Writer's Digest magazine to qualify for a special price on an additional product and, further, that subscription must be active. The special price will only show in the **Shopping Cart** or **Online Store** for customers who match the criteria for **Subscription** and **Subscription Status**.

To add a price qualifier:

1. Go to the **Product Profile**.
2. On the **Price** tab, Price child form, click **Add** .
3. In the **Price Distribution Information** window, enter the **Price Code** and related price information.
4. In the **Price Qualifiers** section, select the Subscription dropdown. Select the subscription that the customer must purchase to obtain the special price for this merchandise. If using only subscription as the price qualifier (and not subscription status), the subscription may have any status at this point.

5. The **Subscription Status** drop-down appears, after selecting a specific subscription as a price qualifier. Use the subscription status drop down to specify that the subscription must have a specific status. In the example below, to obtain a special price on this merchandise purchase, the customer must have an active subscription to Writer's Digest. Using subscription status as a price qualifier without attaching it to a specific subscription yields no results.

6. Click **Save**.



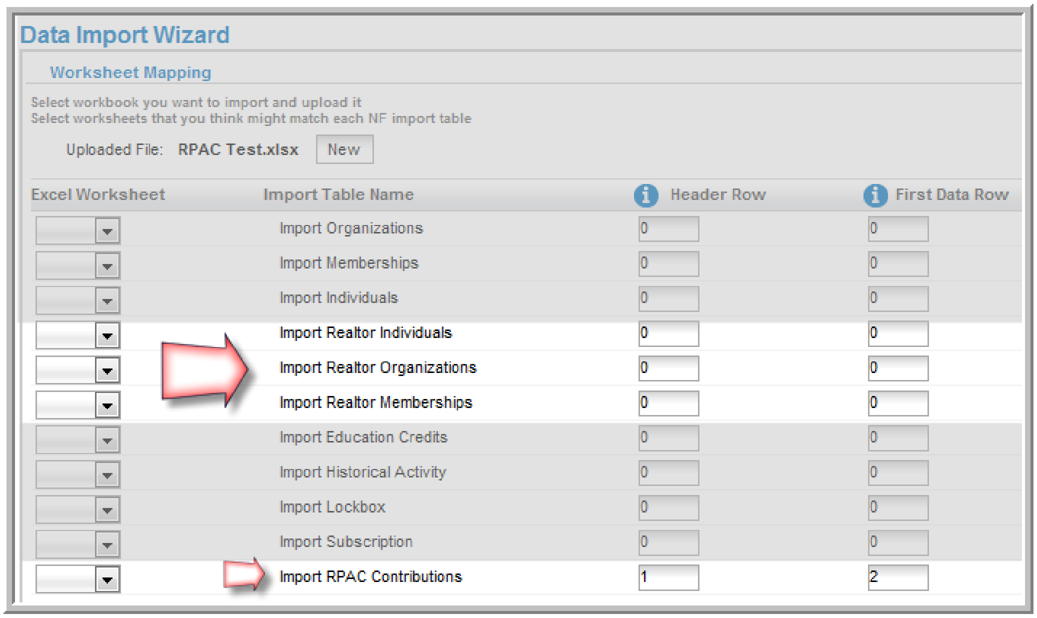
Price qualifiers are available for all product types: Miscellaneous Products, Subscriptions, Merchandise, Events, Sessions, and Member Types.

Data Import Wizard for Realtors

The Data Import Wizard is a feature found in the **Administration** module that allows for quick and easy uploading of data into a **netFORUM Pro for Real Estate Associations** entity.

The Data Import Wizard available in **netFORUM Pro for Real Estate Associations** contains all of the features found in a normal netFORUM Pro entity as well as some realtor specific features. These realtor specific features include the ability to:

- **Import Realtor Individuals**
- **Import Realtor Organizations**
- **Import Realtor Memberships**
- **Import RPAC Contributions**

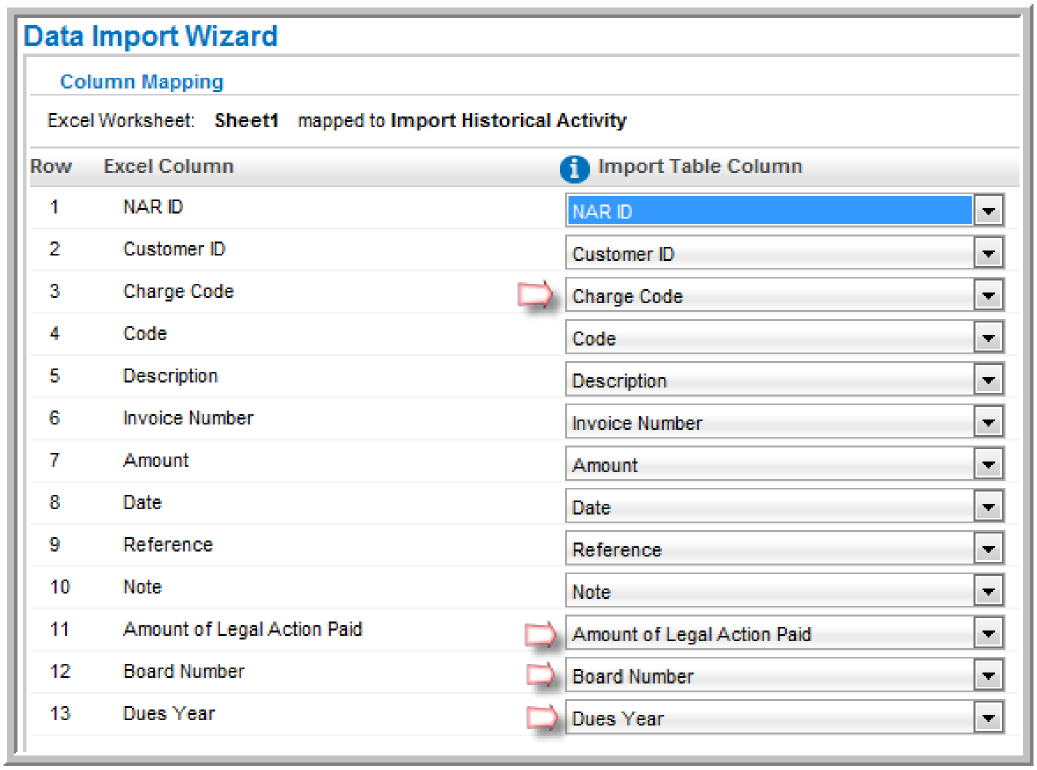


Importing Historical Data

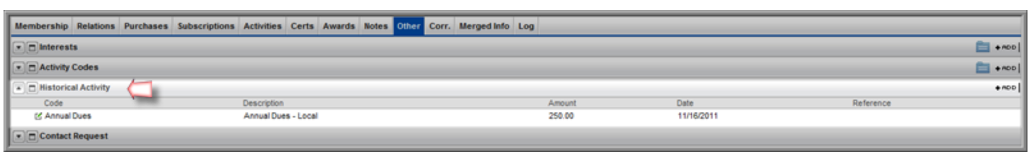
Additional fields have been added to the historical data import feature for Realtor entities. These additional fields allow for associations to better track transactions made by their customers to another realtor organization.

These fields are:

- **Legal Action Paid** – currency field
- **Board Number** – text field
- **Dues Year** – integer field
- **Charge Code** – numeric field.



Historical data that is imported using the Data Import Wizard will be viewable on the **Historical Activity** child form located on the **Other** tab of the Individual and Organization profiles.



Complete details on using the netFORUM Pro Data Import Wizard can be found in online help.

Shopping

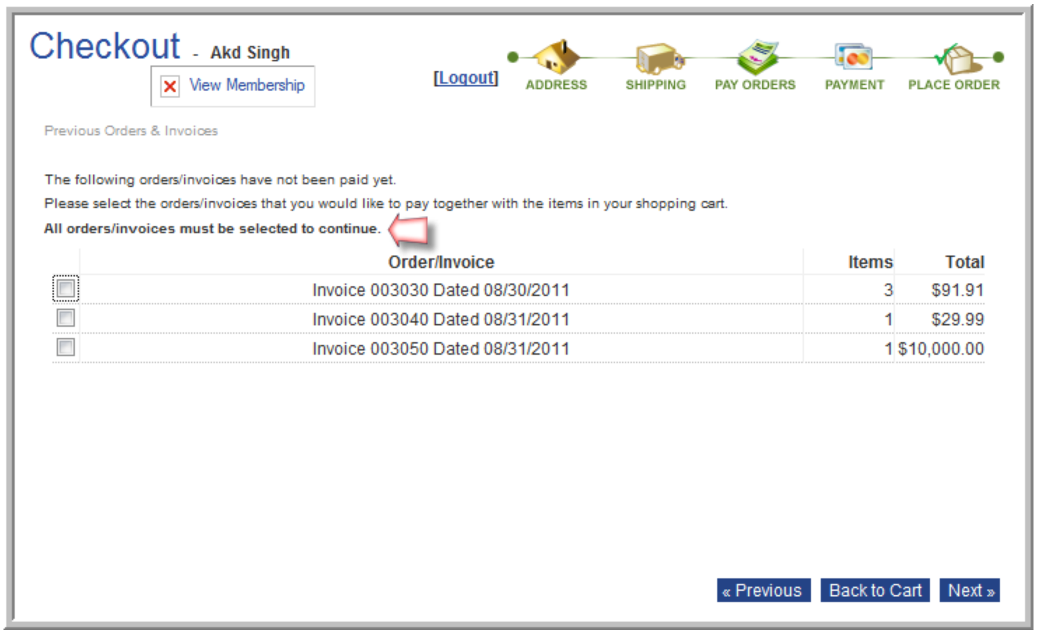
Shopping for Real Estate Associations features include:

- "Force Users to Pay for Open Orders" (page 58)
- "Corporate Card Flag" (page 59)
- "Membership Details on Order" (page 61)
- "Donation Details Visible on Dues Orders" (page 62)

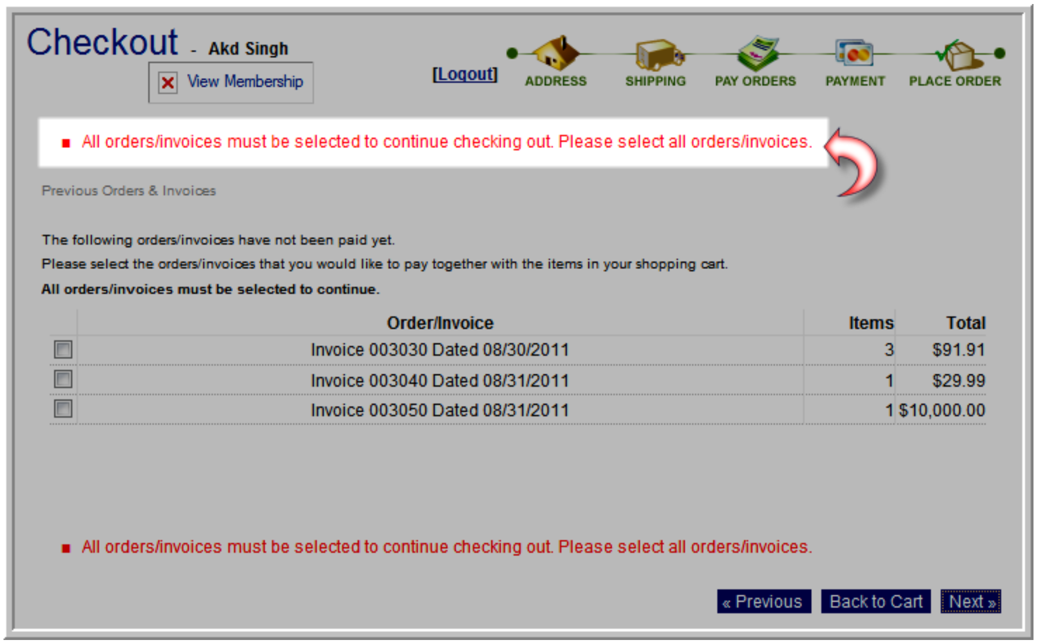
Force Users to Pay for Open Orders

The eWebCheckoutForceOpenPayment system option has been developed that allows administrators of **netFORUM Pro for Real Estate Associations** to force users to pay for all open orders before being allowed to purchase another product on eWeb.

When this system option is enabled by support, users who have open orders and attempt to purchase products on eWeb will be presented with a screen that will require them to submit payment for **all** open orders before proceeding.

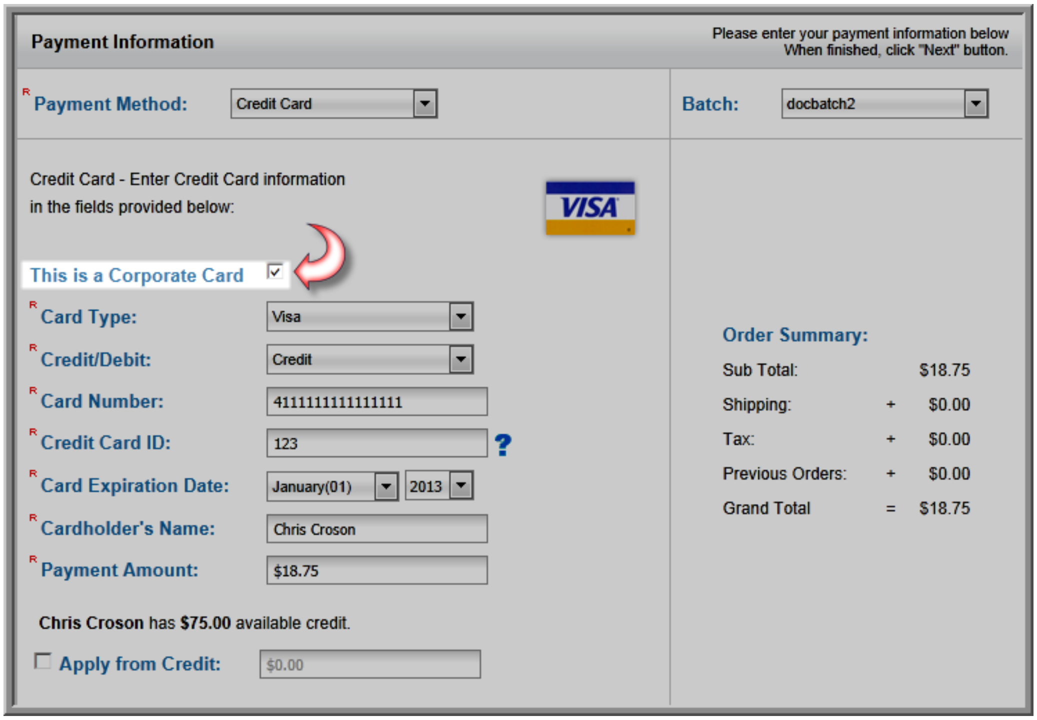


Failure to select to all of the open orders before proceeding in the checkout process will display an error and prevent the user from moving onto the next step.

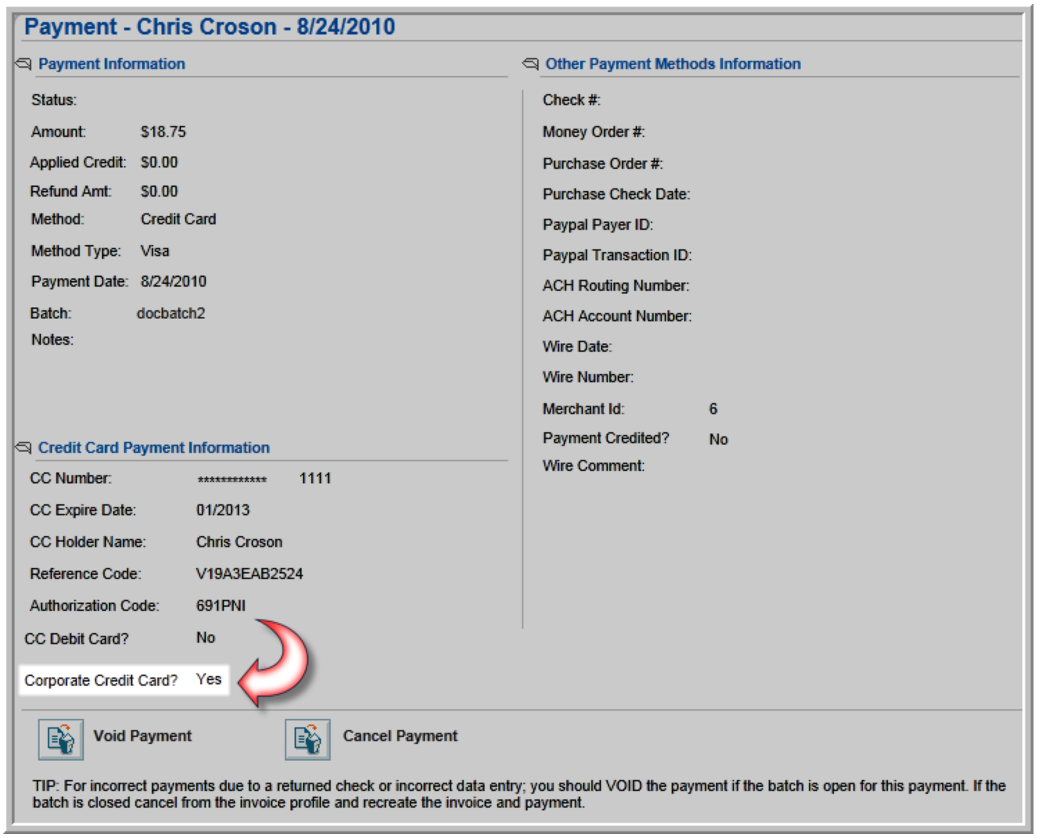


Corporate Card Flag

When a credit card is used as the method of payment, users have the ability to flag the credit card used as a corporate credit card by clicking the **This is a Corporate Card** check box.



If checked, this information will be displayed on the Payment Profile.

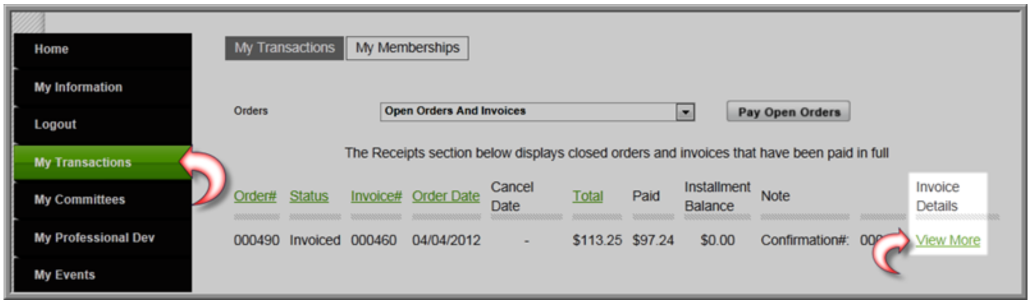


Membership Details on Order

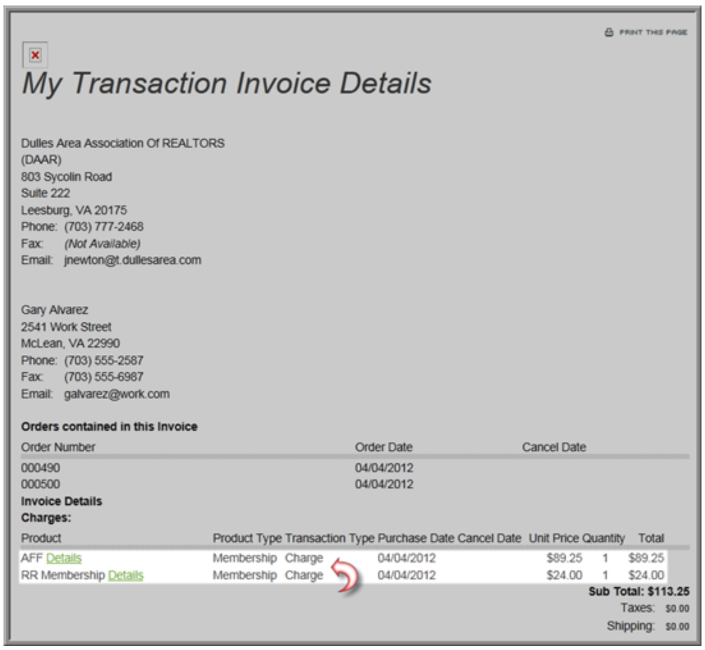
Membership details will show up on the **My Transaction Invoice Details** page in eWeb.

To see the membership details for an invoice:

1. Log into the eWeb site.
2. Click the **My Transactions** button located on the left navigation bar.
3. Click the **View More** link for the desired invoice.



This will open the **My Transactions Invoice Details** page. This page displays all of the line items on the invoice including any membership charges broken down by type.



Donation Details Visible on Dues Orders

Users making a payment on an open dues order in eWeb will see both the dues charges and any donations amounts that were included in that order broken down by line item on the **My Transactions Order Details** page.

PRINT THIS PAGE

REALTOR®

My Transaction Order Details

Realtors Test (Greensboro Based)
(GRRA_TEST)
23 OAK BRANCH DR
Greensboro, NC 27407-2145
Phone: (336) 854-0585
Fax: *(Not Available)*
Email: bpgilliland@test.tst

Scott Shaffer
BLUE RIDGE RESIDENTIAL, LLC
5826 Samet Dr. Ste. 105
High Point, NC 27265
Phone: (336) 889-1500
Fax: (336) 889-5207
Email: scott@blueridge.com

Order # 000680 - Details

Charges:

Product	Product Type	Transaction Type	Purchase Date	Cancel Date	Unit Price	Quantity	Total
Fund Build2012.02-1	Donation	Charge	1/2/2013		$50.00	1	$50.00
Commercial Realtor	Membership	Charge	1/2/2013		$200.00	1	$200.00

Sub Total: 200.00
Taxes: $0.00
Shipping: $0.00

Cancellations:

Product	Product Type	Transaction Type	Purchase Date	Cancel Date	Unit Price	Quantity	Total
No Items.							

Cancellation Total: 0.00

Payments:

Product	Product Type	Payment Type	Payment Date	Cancel Date	Amount	Quantity	Total
No Items.							

Payment Total: 0.00

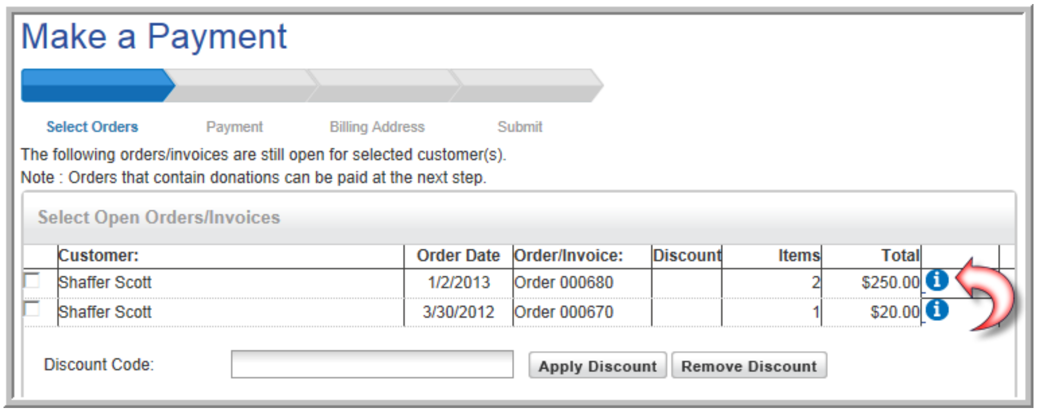
Order Total:

Order Total: $250.00

While the **SubTotal** for the order will only reflect the cost of the membership dues, the overall **OrderTotal** will display a total of all charges.

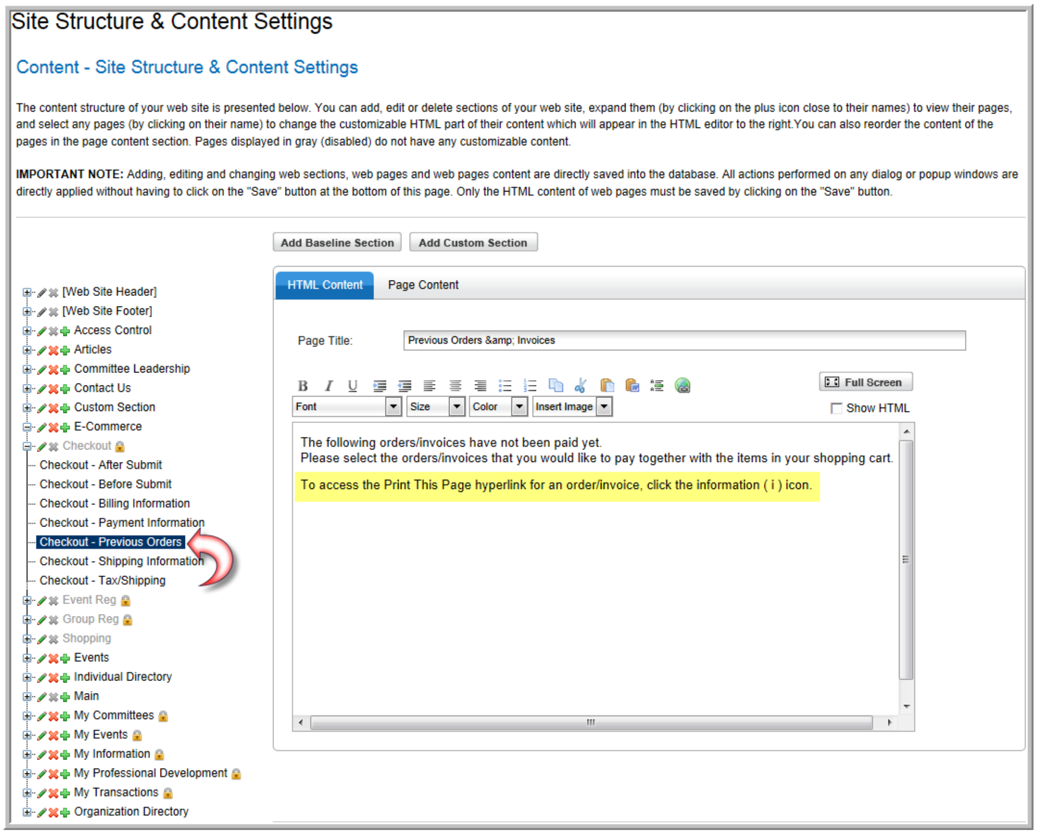
Click the **Print This Page** hyperlink located at the top of the My Transactions Order Details page to print a copy of this page.

If printing the **My Transaction Order Details** page is part of a normal business process, add text to the **Make a Payment** page informing users that the **Print This Page** hyperlink is available after clicking the information icon next to the order.



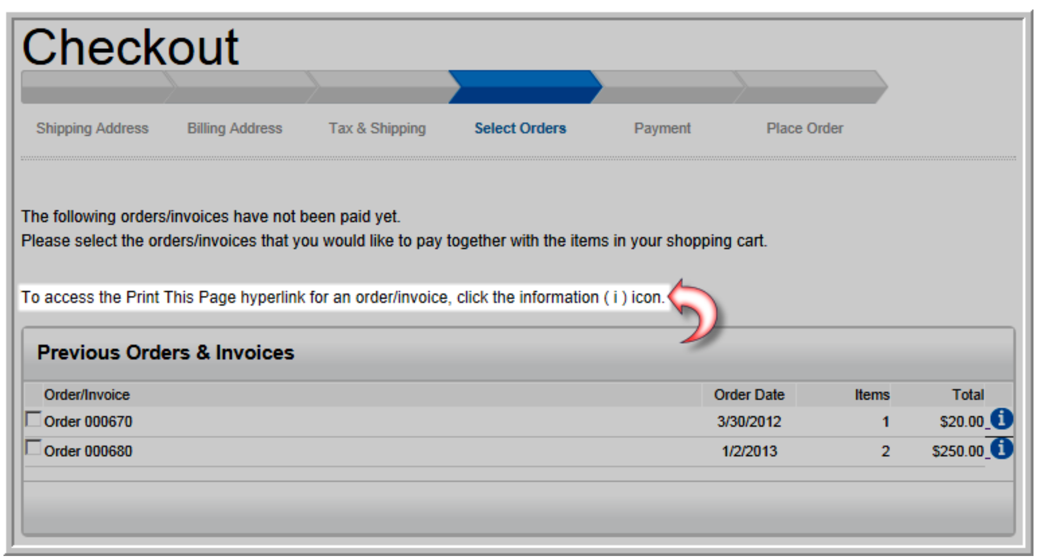
To modify the text on the **Make a Payment** page:

1. Review the steps outlined on the Adding and Editing Web Site Page Content online help topic.
2. Open the **Web Site Editor**.
3. View the **Content** tab.
4. Expand the **E-Commerce** item located along the left side of the **Site Structure and Content Settings** page by clicking the plus icon.
5. Expand the **Checkout** item by clicking the plus icon.
6. Click the **Checkout – Previous Orders** item.
7. Add the desired text.

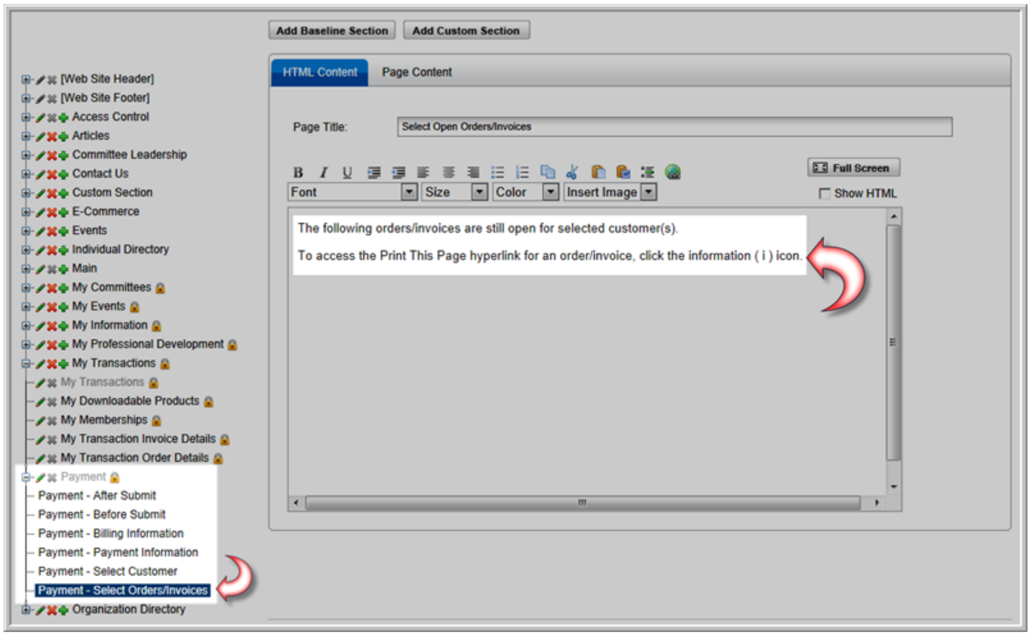


8. Click the **Save** button.

The **Checkout – Previous Orders** eWeb page will be updated with the new content.



To add the same note for individuals accessing the Make a Payment page by clicking the **Pay Open Orders** button located on the **My Transactions** page in eWeb, repeat the steps listed above on the **Payment** > **PaymentSelectOrders/Invoices** page in the Web Site Editor.



Reports and Queries for Real Estate Associations

netFORUM Pro for Real Estate Associations has all of the reports and queries available in a standard instance of netFORUM Pro as well as reports and queries that are specific to the Real Estate vertical.

- "Reports for Real Estate Associations" (page 66)
- "Queries for Real Estate Associations" (page 68)

Reports for Real Estate Associations

The Real Estate specific reports are:

MLS Office Export and **MLS Member Export** – Both of these reports are used to pull customer data from MLS for clients that interface with **MLXchange**. netFORUM Pro for Real Estate Association clients that use systems other than MLS can then use the **Query Tool** to create an export for that vendor.

Member by Member Type – This report shows all of the primary and secondary/supplemental memberships for a customer. Note: This is the only report available in netFORUM Pro for Real Estate Associations that will show supplemental memberships for a customer. This is because supplemental memberships are outside of netFORUM Pro's transactional membership functionality.

Real Estate Broker Report – This report allows users to pull a list of agents for an Office by the NAR ID of the Organization and member type.

Real Estate Member Dues Order Report – This report allows users to print dues orders that display the charge code descriptions and amounts that make up the membership total. Customers are also able to see how these fees are distributed to the NAR, State and Local associations.

Real Estate Member Roster by Firm -This report provides a listing of all members by organization/firm as of the date entered at runtime (or run date if left blank).

Real Estate Member Roster Report - This report provides a listing of all members to the entity as of the date entered at runtime (or run date if left blank)

Realtor Association Counts Report – This report provides a listing of associations with member counts broken down by member type.

Realtor Data Process Failure – This report provides a listing of all of the failed records from the data transfer process for realtors.

Realtor Members Without COE - This report lists members who have not earned a specific education credit during the date range provided.

MLS Office Export Report

This report pulls customer data from MLS for clients that interface with **MLXchange**. netFORUM Pro for Real Estate Association clients that use systems other than MLS can use the **Query Tool** to create an export for that vendor.

Report Parameters

Parameter	Description
State Date	Enter a date, or select a date from the drop down calendar, for the report.
End Date	Enter a date, or select a date from the drop down calendar, for the report.

Report Fields

Field	Description
Report Header	Lists the Report Name, Date the report was run, and the Customer Type for the report.
Customer ID	Lists the customer ID associated with the account transaction.
Customer Name	Lists the customer name associated with the account transaction and customer number.
Balance Credits	Lists the amount of the balance credit.
Grand Total	Provides a total of the gift amount and balance.
Report Footer	List the current page of the total number of pages.

Queries for Real Estate Associations

The Real Estate specific queries are:

NRDS Push Status – This query shows status of data pushes to NRDS from netFORUM for all customers who match the query criteria.

NRDS Push Error Only Log – This query will list NRDS push errors only by date range.

MLS/Supra Subscriber List by Member Flag and Subscription Status - This query will pull a list of MLS and Lockbox subscribers based on member flag and subscription status. Helps reconcile MLS/Lockbox sync.

Outstanding Membership Dues Orders including Broker Name - This query will pull a list of open orders for Realtor Individuals which includes the name of their org and primary broker.

Outstanding Membership Dues Orders by NAR ID - This query will pull a list of all individuals who have an open dues order based on the Org NAR ID.

Realtor Event Registration/Sign In Sheet - This query will pull basic event registration information with NRDS demographics.

ACH Control Number Query - This query will allow staff to enter the ACH control number from Ecommerce to match with the payer of the transaction.

Realtor Payment Query - This query will pull basic payment information that includes NRDS demographics plus the ACH control number.

Realtor Donations (RPAC) by Payment Date Range - This query will pull detailed RPAC donation information.

Realtor Members by Member Status - This query will pull Realtor Members by Member Status.

Realtor Members by Join Date - This query will pull Realtor Members by Join Date.

Realtor Members by Member Type - This query will pull Active members based on more than one Membership Type.

Member Reconciliation (Flagged Members without Active NAR Status) - This query will pull flagged Members who don't have an Active NAR Status.

Secondary Members (Members Outside Primary Board) - This query will pull all Members who have a primary association outside of the primary board.

Realtor Committee Members by Committee - This query will pull committee participants with NRDS demographics

Brokers/Primary Contacts of Active Offices - This query will pull the primary broker (primary contact) of offices by office NAR status.

Realtor Membership Query - This query will pull a list of members with Active NAR status based on their primary board.

Query Tool – The following four fields are available for use in the Query Tool:

- **Office Branch Type**
- **NRDS Join Date**
- **Office Non-Member**
- **Sales Person Count**