IRIS
Manual

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Before starting

What is IRIS?

IRIS is a membership database. IRIS is the Salesforce Customer Relationship Management (CRM) tool implemented for the Secretariat, which helps to manage the ICOM members from their application to the payment of their membership, by way of their affiliation to an International Committee and their IRIS account.

What is an ICOM account?

An ICOM account, also called an IRIS account, is the combination of the contact email registered in IRIS of an ICOM member and his/her password.

This ICOM account (or IRIS account) allows to log onto IRIS and ICOM website.

What is an International Committee Manager?

An International Committee Manager is the person designated by the Chair of the International Committee to log onto IRIS and export the lists of members affiliated to the Committee.

An International Committee can have just one Manager.

What is a National Committee Manager?

A National Committee Manager is the person designated by the Chair of the National Committee to log onto IRIS and manage the memberships of the members who joined or wish to join the Committee.

A National Committee can have just one Manager.

What is an Institutional Manager?

An Institutional Manager is the person in contact with the National Committee or the ICOM Secretariat for questions concerning IRIS.

An Institution can have just one Manager.

What is an Institutional Representative?

An Institutional Representative is a person designated by an Institutional Member to represent it on National Committees and International Committees, as well as at the General Conference and General Assembly. This person need not be an Individual Members of ICOM. Institutional Members can designate three (3) Representatives.

ICOM Network

I am a National Committee's manager

I do not have a National Committee's manager ICOM account?

How to get one?

- First, you need to have a valid contact email.
- Then you need to ask to the chair of your National Committee to send an email to the Head of the Membership Department demanding the creation of an IRIS National Committee's manager account

I have a National Committee's manager ICOM account

Get started

What for?

- To log onto **IRIS** as a National Committee's manager, at the URL:
  https://icom-museum.force.com/InternalSpace and to:
  - Manage the members of your National Committee,
  - Manage the candidates' membership requests (leads),
  - Generate reports, listing the members of your National Committee,
  - Update the information of your Committee,
  - Update your contact email,
  - Change your username.

What is my username?

- By default, your username is your contact email registered in IRIS.

What can a member do on IRIS?

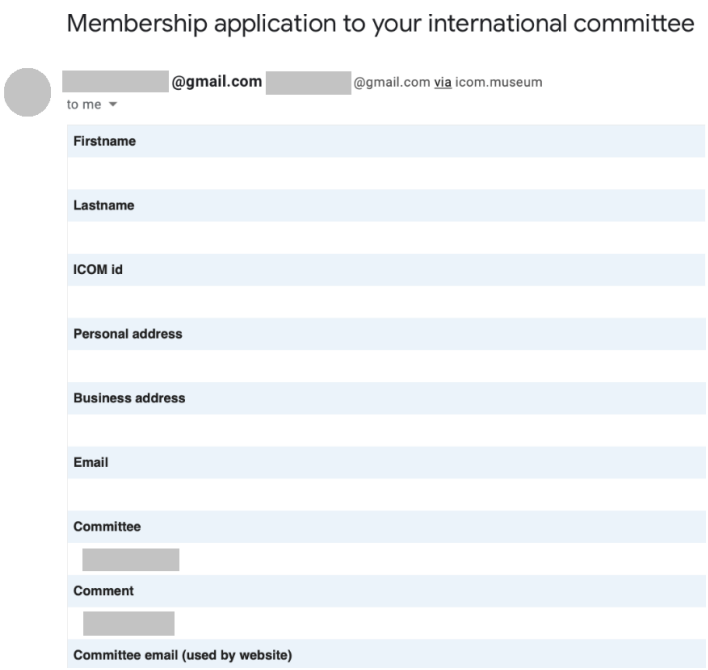
- Depending on the functionalities activated for your National Committee, a member can:
  - If your National Committee is a **NON IRIS Committee**:
    - Change his/her email and International Committee.
  - If your National Committee is an **IRIS Committee**:
    - Change his/her email and International Committee.

- Update all the information displayed on his/her file, except his/her category, National Committee, and Institution,
- Indicate to the National Committee the payment method he/she is going to use for the payment of the membership.

And, if an online payment has been activated for your National Committee, pay his/her membership online.

- Confirm that he/she wants to renew his/her membership when you open the renewal period.

- When a member changes his/her key information (address, name, email), by logging into IRIS at the URL: **https://icom-museum.force.com**, the update is immediately visible by the National Committee's manager who receives, in parallel, an email from IRIS signed by the **ICOM Membership department**, indicating the name, the email, the old and the new value of the data which has been modified.
- When a member changes his/her International Committee, by logging into the ICOM website at the URL: **https://icom.museum/en/**, the update is NOT visible in IRIS. The International Committee's manager receives an email for information and the National Committee's manager receives an email for action. Indeed, the National Committee's manager has to update this information in IRIS, in order to make it visible by the International Committee's manager.


Membership application to your international committee

@gmail.com @gmail.com via icom.museum
to me

Firstname

Lastname

ICOM id

Personal address

Business address

Email

Committee

Comment

Committee email (used by website)

How to reset my password?

- To reset your password via email you have to click on the **Forgot Your Password** link on the IRIS or the ICOM website's login page.

How to reset the password of a member?

- First, update, if needed, the contact email of the member.
- Once it is done, send an email to the member, asking him/her to:
    - Go to **IRIS**: **https://icom-museum.force.com**,
    - And click on the **Forgot Your Password** link.

How to log on to IRIS?

- Go to IRIS login page: **https://icom-museum.force.com/InternalSpace**,
- Enter your ICOM username and password.

Reports

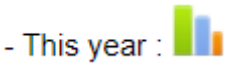
How to generate a report?

- To generate reports displaying the members affiliated to your Committee, you have to:
    - Authenticate on IRIS at the URL:

  https://icom-museum.force.com/InternalSpace
    - Click on the **My national committee** tab:

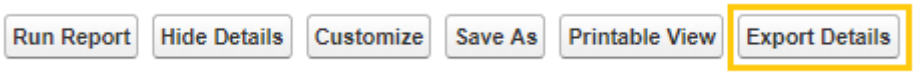
    - Scroll down to the **Reporting** section,
    - Click on the icon of the report you want to generate.

  For example, if you want to view the list of the individual members affiliated to your Committee this year, you have to click on the icon of the report named **This year**:

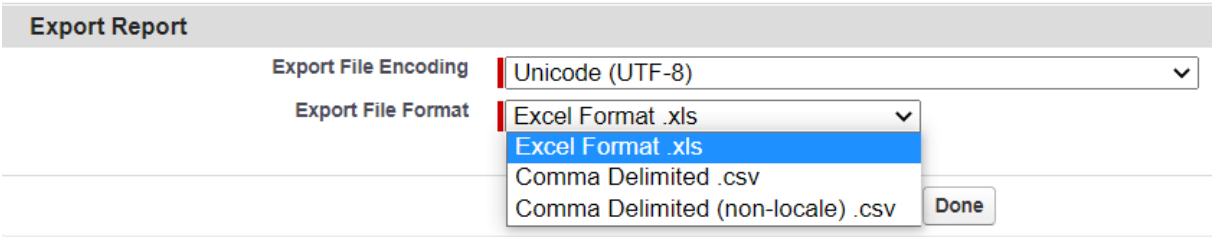


How to export a report?

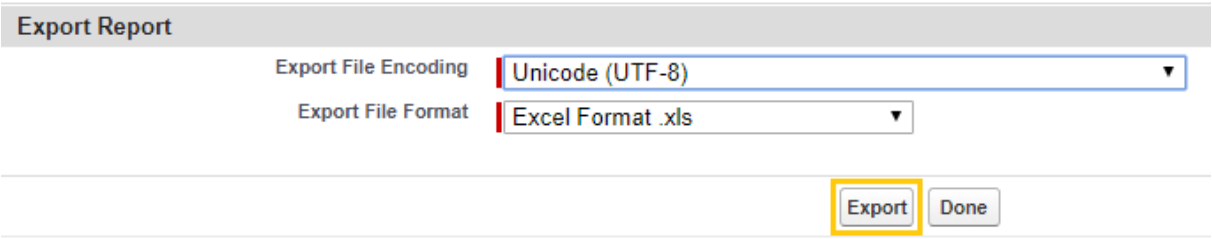
- To export a report, you first have to generate it (see paragraph **How to generate a report?**).
- Then, you have to click on the **Export Details** button:



- Choose the export format: you can choose between **Excel** and **CSV**,



- And click on the **Export** button:

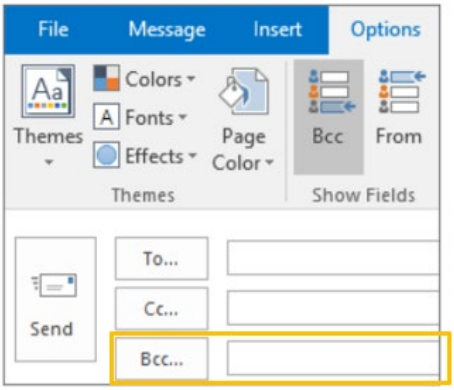


- The report will be downloaded on your computer.
- When the report has been downloaded, click on the **Done** button to close the window, and go back to the file of the Committee.

How to send emails to the members of my Committee?

- IRIS is not an emailing tool. Therefore, to send an email to a specific group of members of your Committee, you have to export a report (see paragraph **How to export a report?**), copy the emails displayed on this report and paste them on your emailing tool.

- For GDPR reasons, if you use Outlook as an emailing tool, please turn on the **Bcc** field and paste the emails in the Bcc box.



What are the different reports?

Individual members

- The report **Evolution per year** displays the evolution of the number of individual ICOM members affiliated to your Committee over the past 10 years:

- Evolution per year :

- The report **New this year** displays the new individual ICOM members who are affiliated to your Committee. The transfer of the fees to the Secretariat may not has been made:

- New this year :

- The report **This year** displays the individual ICOM members who are affiliated to your Committee this year. The transfer of the fees to the Secretariat may not has been made:

- This year :

Note that a member is considered affiliated to a National Committee only when the fees of his/her membership have been sent to the Secretariat. For administrative reasons, this rule cannot be applied to the current year. Please also note that new members can join your National Committee during the year. Therefore, the report **This year** can change from day to day. Due to this "volatility", each time you need to send an email to the members affiliated this year to your Committee, you should export the report to have an updated list of your members.

- The report **Last year** displays the individual ICOM members who were affiliated to your Committee last year. The transfer of the fees from the National Committee to the Secretariat has been made:

- Last year :

- The report **Data modified by member – Last 30 Days**, displays the names of the individual ICOM members affiliated to your Committee who have modified key personal data on IRIS, but also the key data before and after their modification

- Data modified by member - Last 30 Days :

Institutional members

- The report **New this year** displays the new institutional ICOM members who are affiliated to your Committee. The transfer of the fees from the National Committee to the Secretariat may not has been made:

- New this year :

- The report **This year** displays the institutional ICOM members who are affiliated to your Committee this year. The transfer of the fees from the National Committee to the Secretariat may not has been made:

- This year :

- The report **Last year** displays the institutional ICOM members who were affiliated to your Committee last year. The transfer of the fees from the National Committee to the Secretariat has been made:

- Last year :

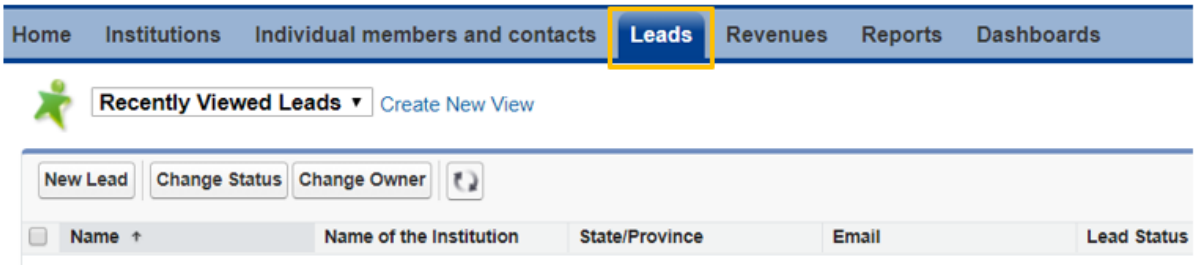
Leads

What is a lead?

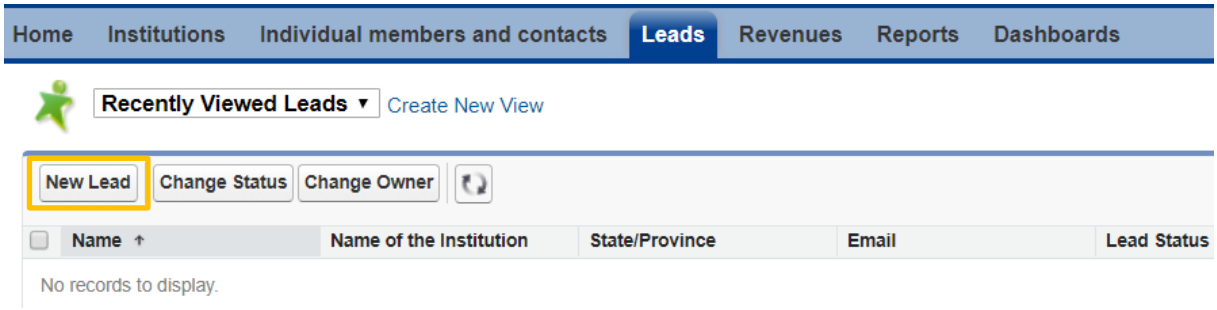
- A lead is a candidate who is interested in becoming an ICOM member.

How to create a lead in IRIS?

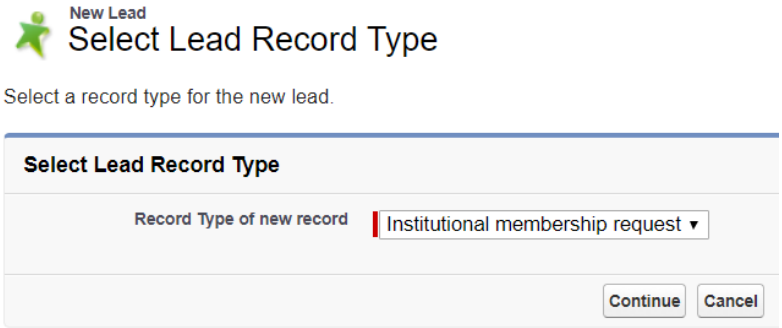
- You can create it manually by following the steps described below:
    - Click on the **Leads** tab:



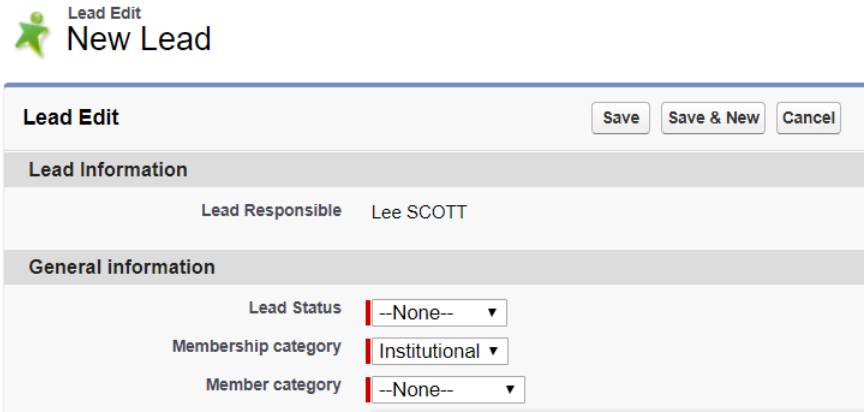
    - Click on the **New Lead** button



- Choose the Type of the lead: Institutional membership request or Individual membership request.



- Fill the fields, considering that those marked in red are mandatory.

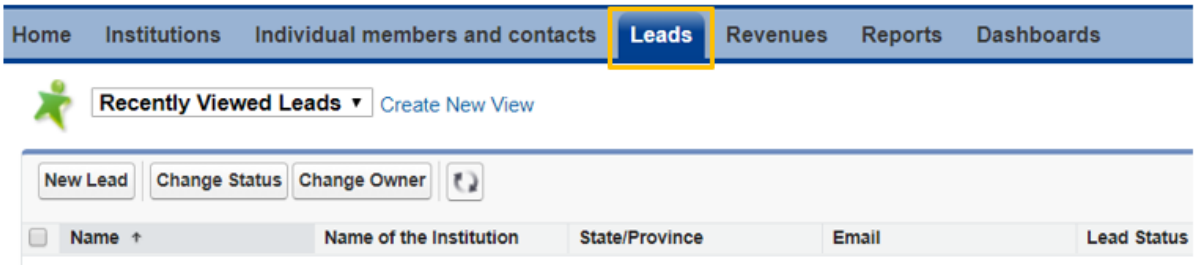


- Finally, click on the **Save** button.

How to create a lead through the Online Form?

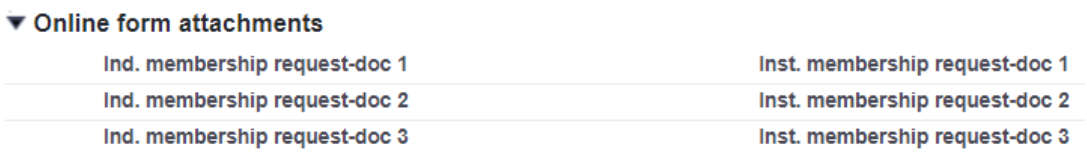
- The candidate can create the lead for you. For that, you need to tell the candidate to:
  - Go to one of the URLs below:
    - Online application in English:
    http://icom-museum-membership.force.com/ICOM_Adhesion?CodeLangue=EN
    - Online application in French:
    http://icom-museum-membership.force.com/ICOM_Adhesion?CodeLangue=FR
    - Online application in Spanish:
    http://icom-museum-membership.force.com/ICOM_Adhesion?CodeLangue=ES
    - Fill in and send the form.

    As soon as the form is sent by the candidate, a lead is automatically created in IRIS. You can see the leads created by candidates by clicking on the **Leads** tab:



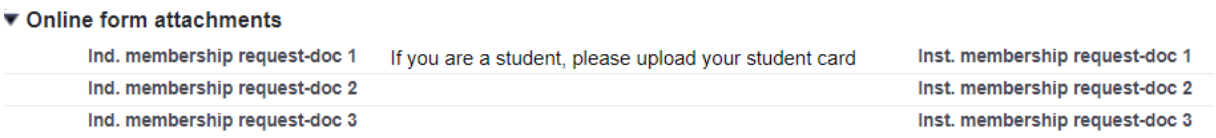
How to add an attachment to a lead?

- To allow your candidates to add an attachment, open the file of your National Committee, scroll down to the **Online form attachments** section and fill in the fields displayed.

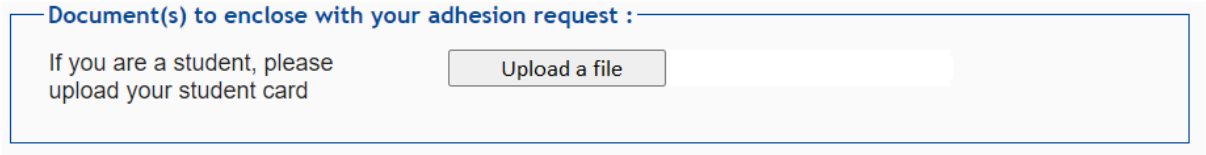


- Automatically, as soon as one of these fields is filled in, the wording is displayed on the online application form and an upload field is added.

For example, if you fill in the field **ind. membership request-doc 1**, which is one of the three fields implemented for individual members online candidacies:

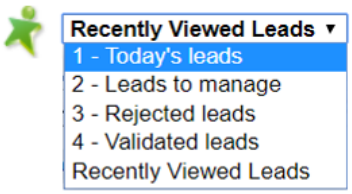


the online form for individual members candidacies will display:



How to manage a lead?

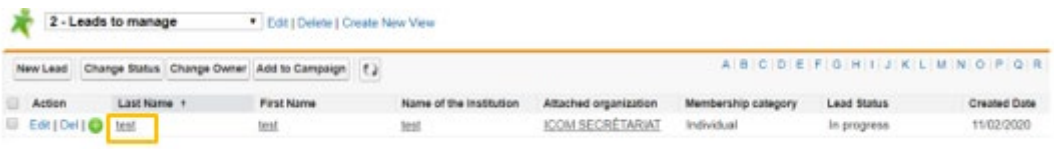
- On the screen above, you have a drop-down list which allows to filter the list of leads.



- A lead can have 3 statuses: **In progress**, **validated** and **rejected**.
  Please note that a *validated lead is not a registered member* and therefore has not an ICOM number. The ICOM number is generated automatically by IRIS when the lead is *converted* into a member.
- The different statuses offer the possibility to regroup the leads in different views:
  - The leads in progress are displayed under the view **2 – leads to manage**,
  - The rejected leads are displayed under the view **3 – Rejected leads**,
  - And the validated leads are displayed under the view **4 – Validated leads**.
- The **1 - Today's leads** view displays all the leads created today, regardless of their status.

- To manage a lead, you have to:

- Click on the name displayed in one of the views described before.



It will display a screen where you can check the data, correct it and update the status of the lead.

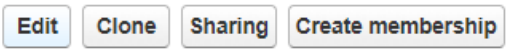
- To edit a field, you can mouse over the field and double click when a pen appears:

Or click on the **Edit** button:

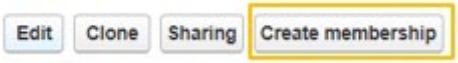
How to convert a lead into a member?

- Before beginning the procedure for the conversion of the lead, it is important to check if the member already exists in IRIS in order not to create a double.
- To convert a lead into a member, click on its name in one of the lists described in *How to manage a lead?*

  It will display a screen containing the buttons below:



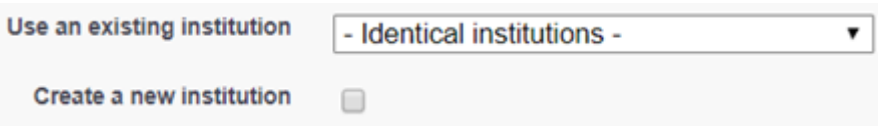
- On that screen, you have to follow the following steps:
  - Click on the **Create membership** button,



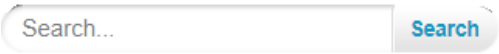
- This first screen concerns the *institution*. It is important to have in mind that most of the institutions where ICOM members work are already registered in IRIS. That means that you will rarely have to register a new Institution in IRIS. Therefore it is important to check the existence in IRIS of the institution where the candidate works in order not to create a double. For that you have two functionalities that will help you in that task:

1.Use an existing institution:

- This drop down list displays the institutions registered in IRIS with a similar or an identical name than the lead's institution. Before selecting one of the results suggested by IRIS, please check, by doing a simple search, that the lead's institution is the same than the one suggested by IRIS.

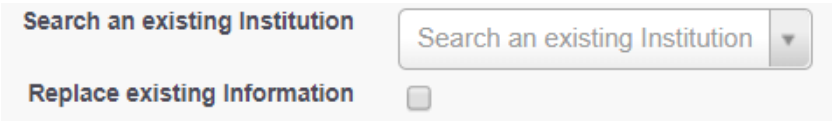


1.1 Simple search:



2.Search an existing institution:

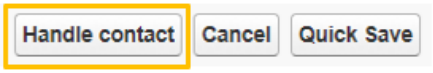
- This search box allows to search an institution registered in IRIS which has the same or a similar name than the lead's institution. Before selecting one of the results suggested by IRIS, please check, by doing a simple search, that the lead's institution is the same than the one suggested by IRIS.



2.1 Simple search:

- If you find the institution:
  - Select the institution in one of the lists.
- If you do not find the institution:
  - Please ask the Membership department to create it for you.

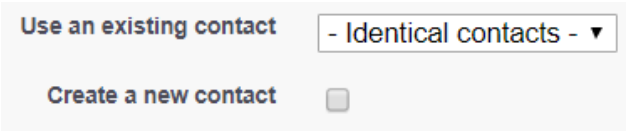
    Membership department's contact email: **membership@icom.museum**
- Once you have completed the institution's information, click on the **Handle contact** button:



- This second screen concerns the *contact*. In order not to create a double you have to check that the candidate is not already a registered member in IRIS. For that you have two functionalities that will help you in that task:

1.Use an existing contact:

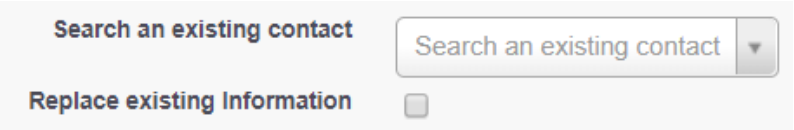
- This drop down list displays the members registered in IRIS with a similar or an identical name than the lead's name. Before selecting one of the results suggested by IRIS, please check that the member registered in IRIS is the same than the lead, by doing a simple search in IRIS.



1.1 Simple search:

2.Search an existing contact:

- This search box allows to search a member registered in IRIS who has the same or a similar name than the lead's name. Before selecting one of the results suggested by IRIS, please check that the member registered in IRIS is the same than the lead, by doing a simple search in IRIS.

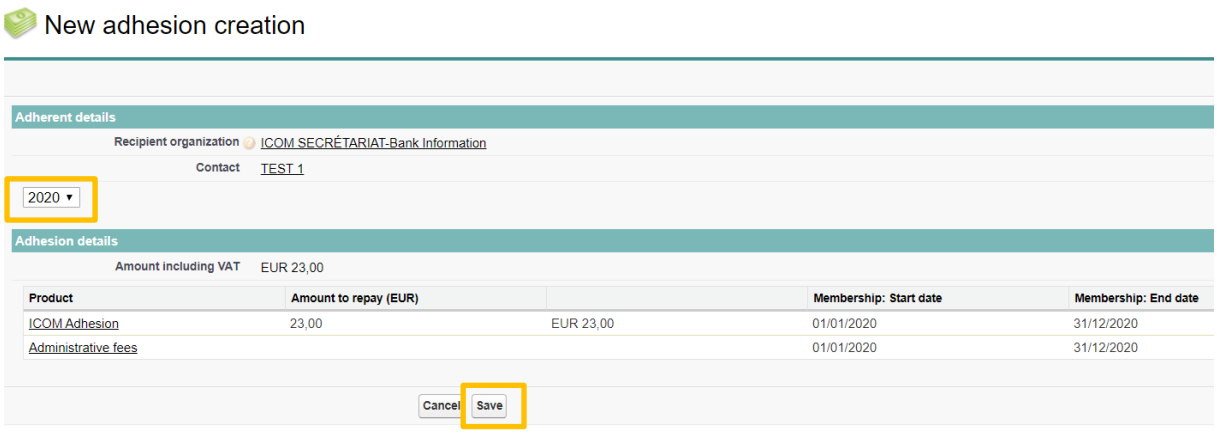


2.1 Simple search:

- If you find the member:
  - Select the member in one of the lists.
- If you do not find the member:
  - Tick the checkbox **Create a new contact**:

- At this step you are ready to convert the lead into an individual member. For that, click on the **Convert** button.

- You are directed to a page where you can add the payment. Note that if you want to add a payment for another year than the current year, you have to change the year displayed on the drop-down list below. When you are ready, click on the **Save** button.

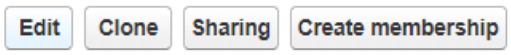


- At this step, the lead has been converted into an ICOM member. An ICOM number has been automatically created and attributed to the newly created member.

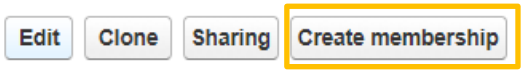
How to convert a lead into an institution?

- Before beginning the procedure for the conversion of the lead, it is important to check if the institution already exists in IRIS in order not to create a double.
- To convert a lead into a member, click on its name in one of the lists described in *How to manage a lead?*

  It will display a screen containing the buttons below:



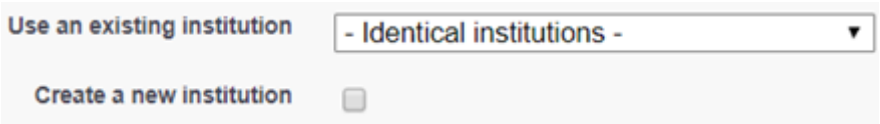
- On that screen, you have to follow the following steps:
  - Click on the **Create membership** button,



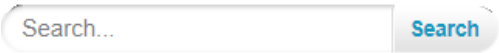
- This first screen concerns the *institution*. It is important to check if the institution already exists in IRIS in order not to create a double. For that you have two functionalities that will help you in that task:

1.Use an existing institution:

- This drop down list displays the institutions registered in IRIS with a similar or an identical name than the institutional lead's name. Before selecting one of the results suggested by IRIS, please check, by doing a simple search, that the institution you want to register in IRIS is the same than the one suggested by IRIS.

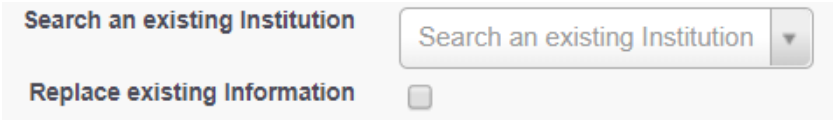


1.1 Simple search:

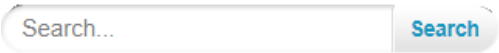


2.Search an existing institution:

- This search box allows to search an institution registered in IRIS having the same or a similar name than the institutional lead's name. Before selecting one of the results suggested by IRIS, please check, by doing a simple search, that the institution you want to register in IRIS is the same than the one suggested by IRIS.



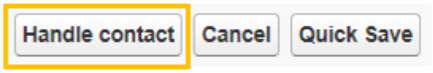
2.1 Simple search:



- If you find the institution:
    - Select the institution in one of the lists.

- If you do not find the institution:
    - Tick the **Create a new institution** checkbox.

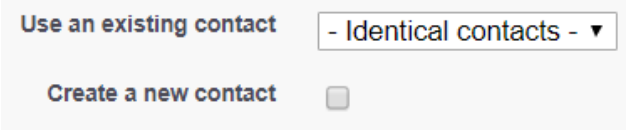
- Once you have completed the institution's information, click on the **Handle contact** button:



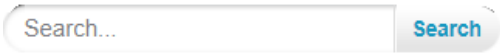
- This second screen concerns the *contact*. A contact is the IRIS manager for the institution. That is to say the person in charge of the payments and of the designation of the institution's representatives. In order not to create a double you have to check that the institutional lead´s contact is not already registered in IRIS. For that you have two functionalities that will help you in that task:

    1.Use an existing contact:

- This drop down list displays the members registered in IRIS with a similar or an identical name than the institutional lead's contact name. Before selecting one of the results suggested by IRIS, please check, by doing a simple search in IRIS, that the member suggested by IRIS is the same than the institutional lead's contact.

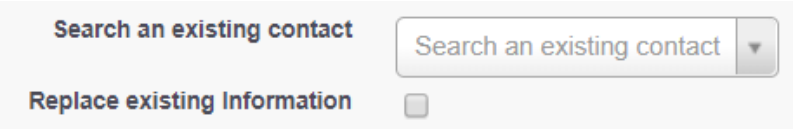


1.1 Simple search:

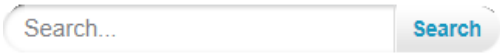


2.Search an existing contact:

- This search box allows to search a member or a contact registered in IRIS having the same or a similar name than the institutional lead's contact name. Before selecting one of the results suggested by IRIS, please check, by doing a simple search in IRIS, that the member suggested by IRIS is the same than the institutional lead's contact.



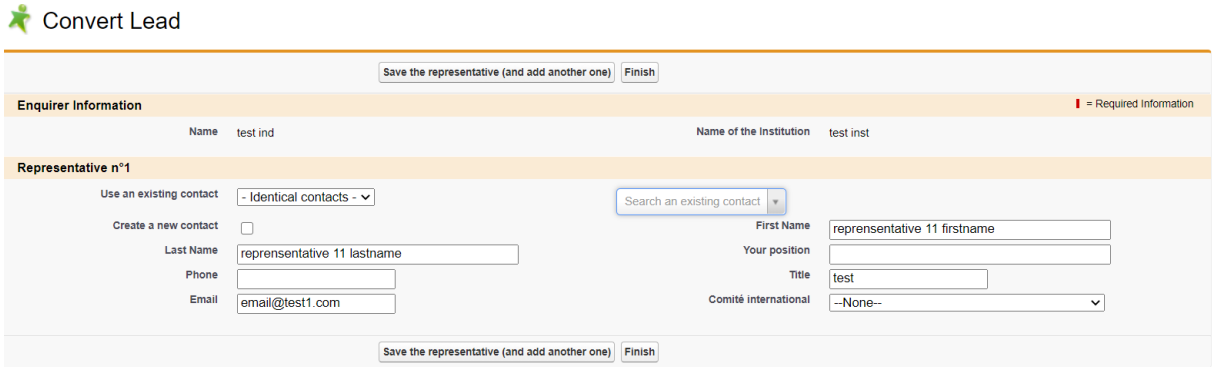
2.1 Simple search:



- If your find the member:
  - Select the member in one of the lists.
- If you do not find the member:
  - Tick the **Create a new contact** checkbox:

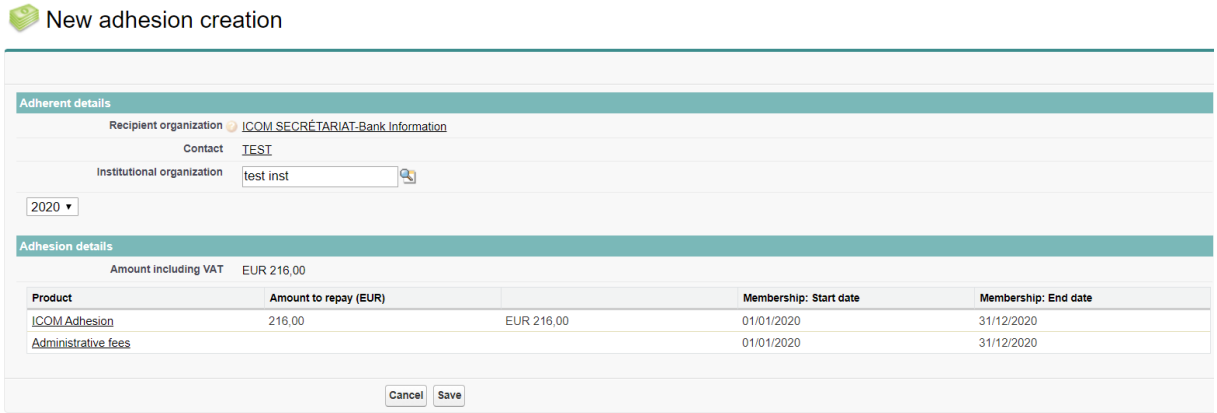
- At this step you are ready to convert the lead into an institutional member. For that, click on the **Convert** button.

- You are directed to a page where you can add a representative.



- To add one, two or three representatives:
  - To add a representative you have to fill in the fields of the form or search for a member already registered in IRIS by using the **Search an existing contact** search box, and click on the **Save the representative (and add another one)** button.
  - To add a second and a third representative, repeat the action detailed above.
- To finsish the conversion of the lead:
  - Click on the **Finish** button. Important, if you click on that button without having, beforehand, clicked on the **Save the representative (and add another one)** button, the representative whose information you have filled in the form won't be saved. <u>Therfore click on that button only when you have registered all the representatives of the institution</u>.

- When you click on the **Finish** button, you are directed to a page where you can add the payment. Note that if you want to add a payment for another year than the current year, you have to change the year displayed on the drop-down list below. When you are ready, click on the **Save** button.



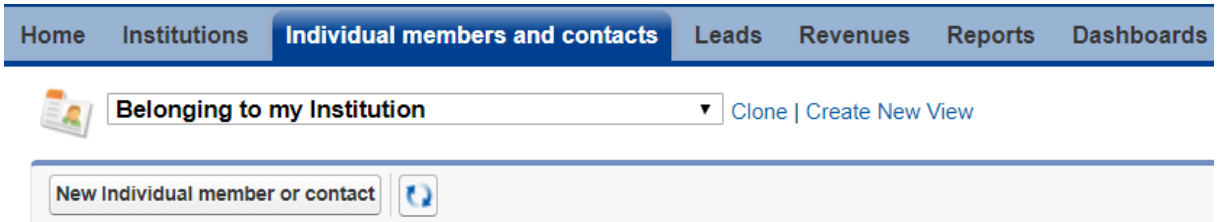
Important

- The data you can fill in the form for the representatives is limited. Once you have finished the conversion of the lead into an Institutional Member, you should open each representative file and complete the information. A complete representative file should have the following information:
    - Membership country
    - Member status
    - Attached organization
    - Language
    - Contact email

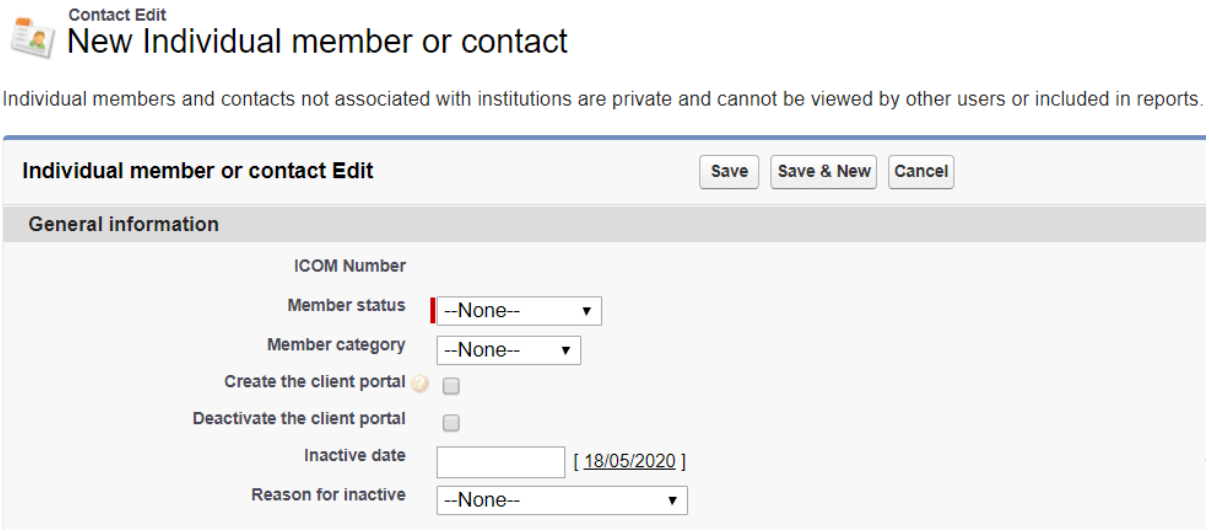
Individual members

How to create an individual member without a lead?

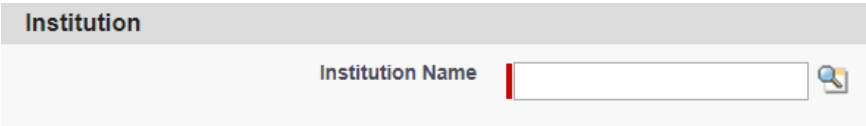
- Depending on the way your National Committee works, you may need to create a member, directly, without having to validate a lead by the board of your National Committee, and therefore without having to convert a lead into a member.
- To create an individual member in IRIS, follow the steps below:
    - Click on the Individual members and contacts tab,
    - On the page displayed, click on the **New Individual member or contact** button,



- Fill in the fields and click on the **Save** button.

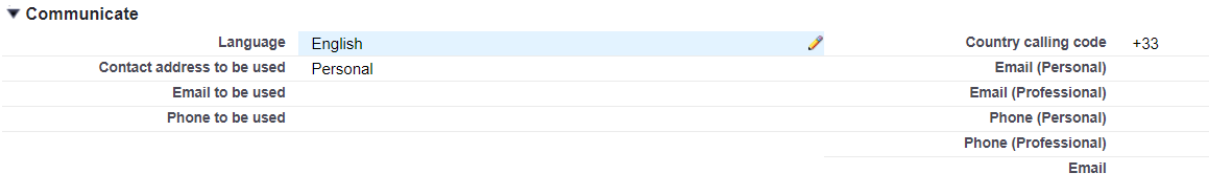


Important: All the fields marked in red are required. If the member is an independent, in the **Institution name** field, you can enter the value **Person account.**

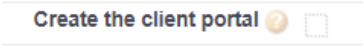


How to create an ICOM account?

- To be able to create an ICOM account for an individual member, you first need to register in IRIS the email of the member. For that, click on the name of the member to open its file, then scroll down to the section *Communicate* and fill in the fields: *Email (Personal), Email (Professional)* and *Email to be used*. This last information is important because it determines which email will be used by IRIS to create the username of the ICOM account.



- Then, tick the **Create the IRIS Client Portal** checkbox.



The ICOM account will be created over-night system update. As soon as it is created, an email is sent to the member inviting him/her to create his/her password. Note that the link contained in the email sent by IRIS is active only 24 hours. If the member has not clicked on that link during that period he/she can resend the email by clicking on the **Forgot your password?** displayed on the authentication window on ICOM website.

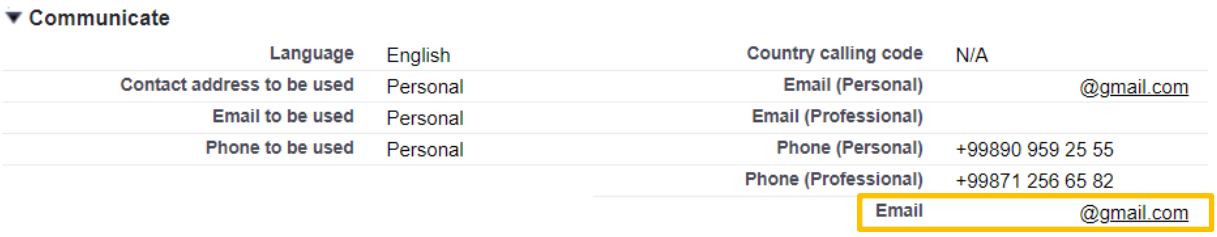
How to know if a member has an ICOM account?

- On the file of the member, if the field **Portal client user** is empty, the member has not an ICOM account. On the contrary, if that field is filled, the member has an ICOM account.

Portal client user

What is the username of the ICOM account?

- By default, your username is your contact email registered in IRIS.



How can a member reset the password of the ICOM account?

- Ask to the member to click on the **Forgot Your Password** link displayed on the IRIS or the ICOM website's login page. The member will receive an email in his/her email box inviting him/her to change its password. This email will be sent to the email box registered in IRIS as his/her contact email (see before).

How can a member log onto IRIS?

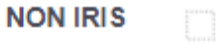
- Go to the IRIS login page: **https://icom-museum.force.com**,
- Enter your ICOM username and password.

How can a member log onto the ICOM website?

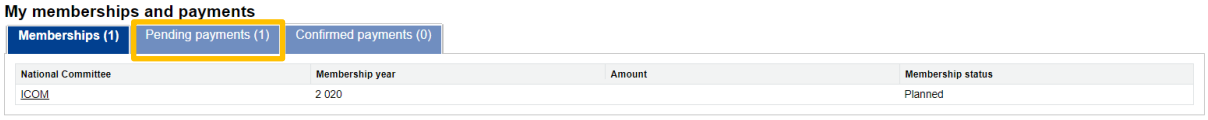
- Go to the ICOM website: **https://icom.museum/en/**
- Click on the **Log in** link
- Enter your ICOM username and password

How can a member pay the ICOM membership?

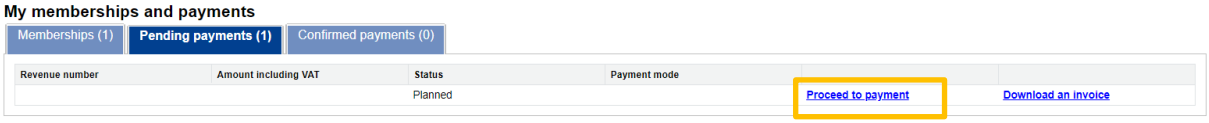
- The online payment functionalities are accessible for your members only if your Committee is a full IRIS National Committee. You can check this on the IRIS file of your National Committee. If the **NON IRIS** checkbox is unchecked, your Committee is a full IRIS National Committee. If not, your members can only update online their name, email and International Committees.



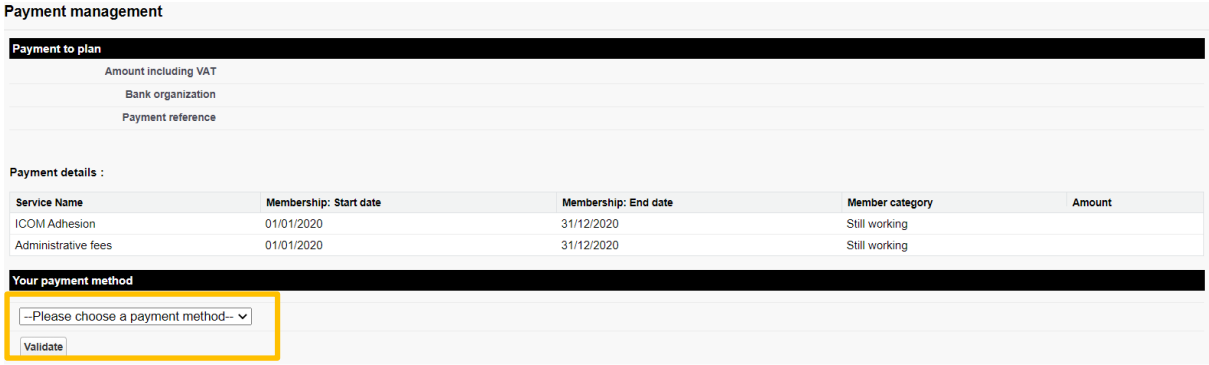
- If your Committee is a full IRIS Committee, you can ask your member to follow the following procedure:
    - Log onto **IRIS**: **https://icom-museum.force.com**,
    - Click on the **Pending payments** tab,



    - Click on the **Proceed to payment** link,



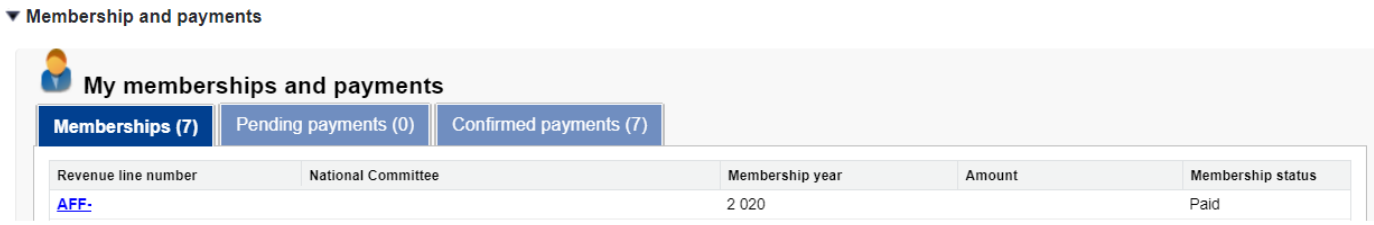
    - Choose your payment method and click on the **Validate** button,



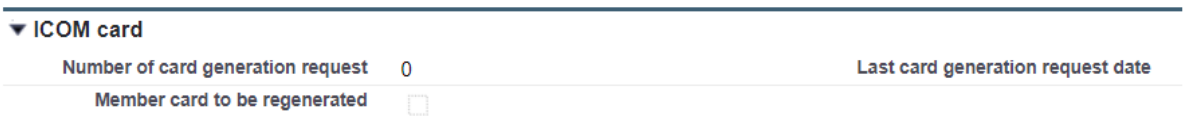
- If the online credit card payment solution has been implemented for your Committee, the member will be able to pay the ICOM membership online. If not, the member will only be able to register a promise of payment.

How can a member get a new card?

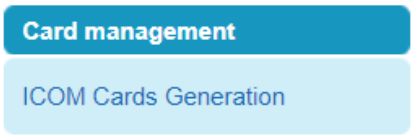
- If a member has lost his/her card or has a card covered with stickers, he/she may want to replace it. The first thing a member should do is to contact its National Committee in order to inform its manager that he/she needs another card.
- At that step, you need to:
    - Open the file of the member in IRIS,
    - Scroll down to the **Membership and payments** section, and under the **Memberships** tab click on the **Revenue line number** for the current year:



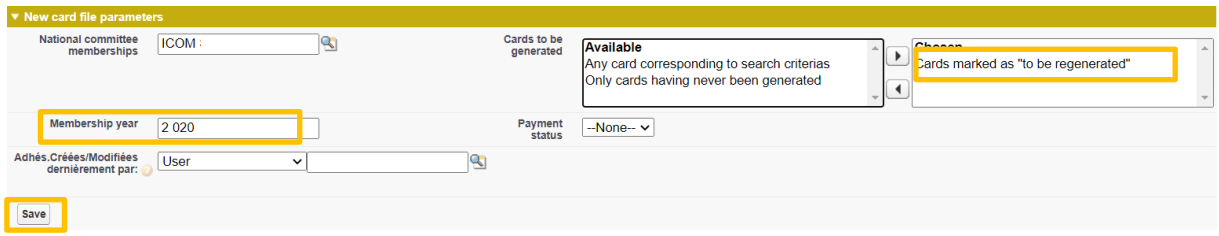
    - Scroll down to the **ICOM card** section and tick the **Member card to be generated** checkbox and save.



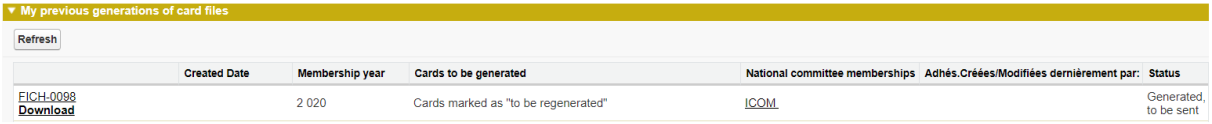
- At that step, you have to click on the **ICOM Cards Generation** link, on the left menu:



- On the page displayed, select the option **Cards marked as "to be regenerated"**, select the **Membership year** and click on the **Save** button:



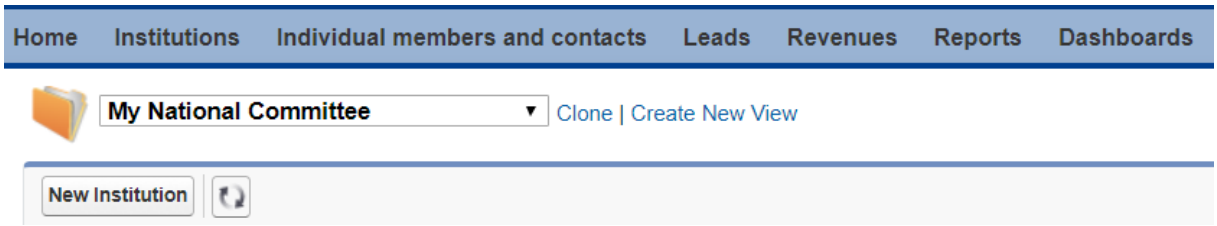
- Once the file has been generated, download it and send it to the Secretariat:



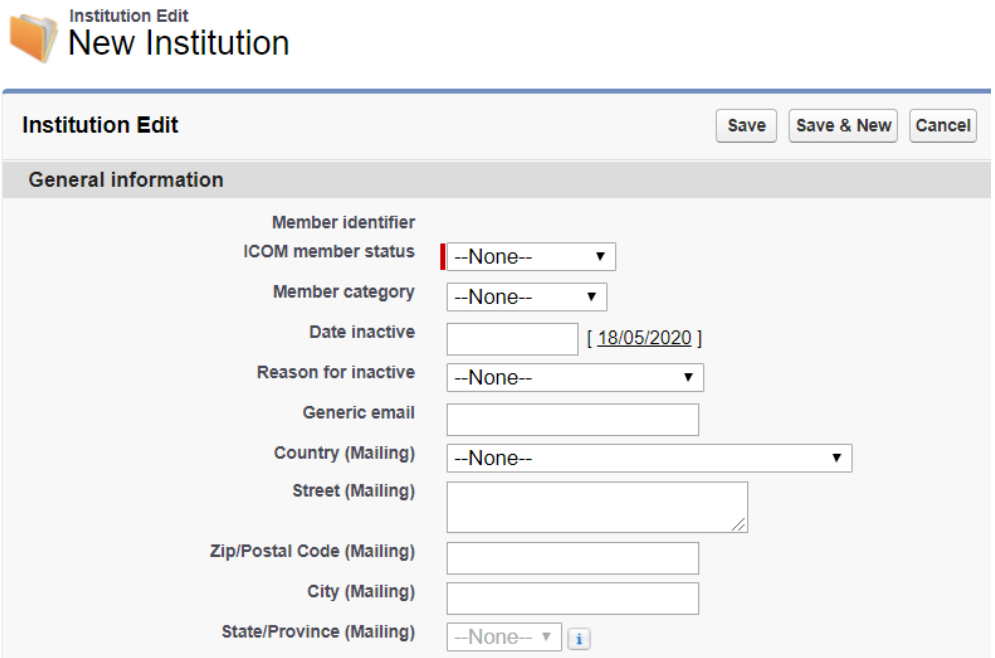
Institutional members

How to create an institutional member without a lead?

- Depending on the way your National Committee works, you may need to create a member, directly, without having to validate a lead by the board of your National Committee, and therefore without having to convert it into a member.
- To create an institutional member in IRIS, follow the steps below:
  - Click on the **Institutions** tab,
  - On the page displayed, click on the **New Institution** button,



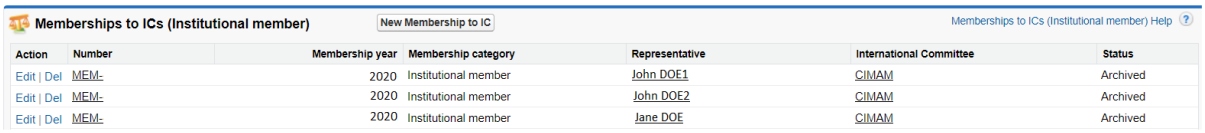
- Fill in the fields and click on the **Save** button.



How to link a representative to an International Committee?

- First, you should check if the representatives registered on the Institutional Member's file are the good ones. On the contrary, you should update the names.

- Only then, you can link the representatives to an International Committee by doing the following steps:
  - On the file of the Institutional Member, go to the **Memberships to ICs (Institutional Member)** section and click on the **New Membership to IC** button.



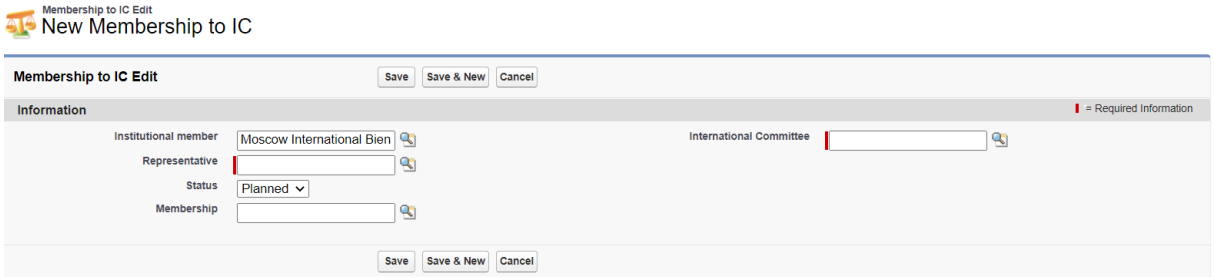
- On the displayed page, enter the name of the International Committee in the **International Committee** field and the name of the representative of the Institutional Member in the **Representative** field, and click on the **Save** button.

Important

If you change the representatives, and the affiliations to ICs have already been created under the section **Memberships to ICs (Institutional Member)**, please update the names of the representatives of the affiliations to ICs too.

What is the role of the manager?

- The manager is the person in charge of the membership payment of the Institutional Member. On IRIS, the manager can also change the association between a representative and an International Committee, but he/she can't change the representatives.



Payments

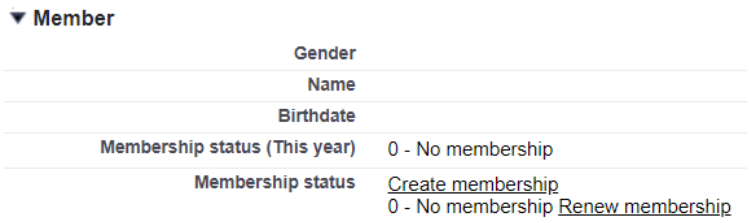
General

Introduction

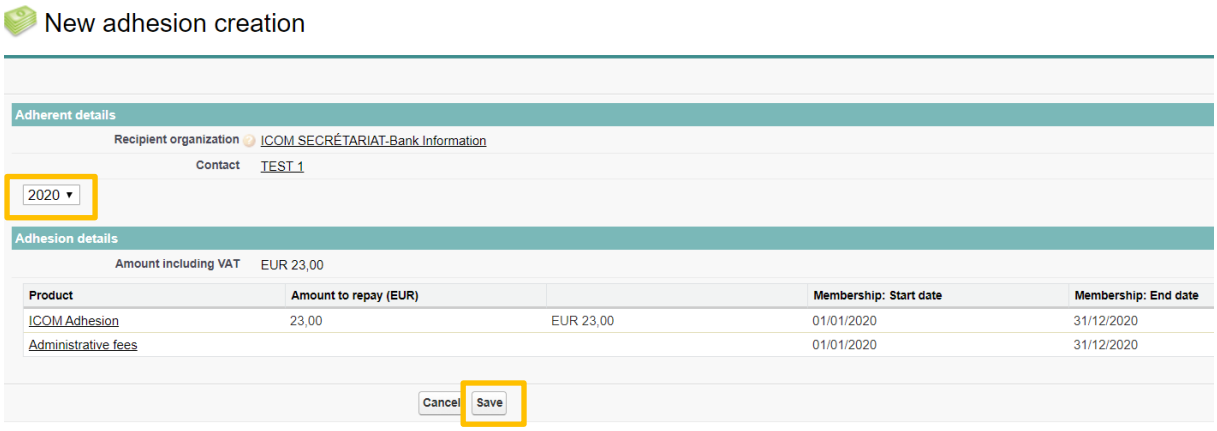
- A member is attached to a National Committee which is itself attached to a Recipient Organization which represents, virtually, the Bank account of the National Committee. This means that a payment registered in the member's file, regardless of the payment's status, is automatically linked to the Recipient Organization of the National Committee, that is to say its virtual Bank account. To see the Recipient Organization of your National Committee, you need to open the file of your National Committee, scroll down to the **Membership and payments** section and click on the **Recipient organization** link. It will open the **Bank organization** page.

How to add a payment

- If you have created a member directly in IRIS without converting a lead, the payment line has to be added manually following the following steps:
  - Open the file of the member, scroll down to the **Member** section and click on the Create membership link.



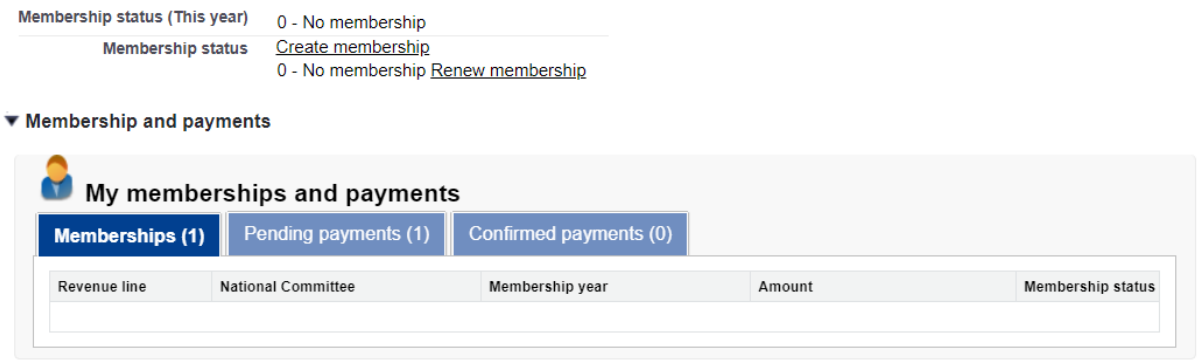
  - You are directed to a page where you can add the payment. Note that if you want to add a payment for another year than the current year, you have to change the year displayed on the drop-down list below. When you are ready, click on the **Save** button.
    Important: If your National Committee has not a price list for the selected year, the payment will be created with a null amount.



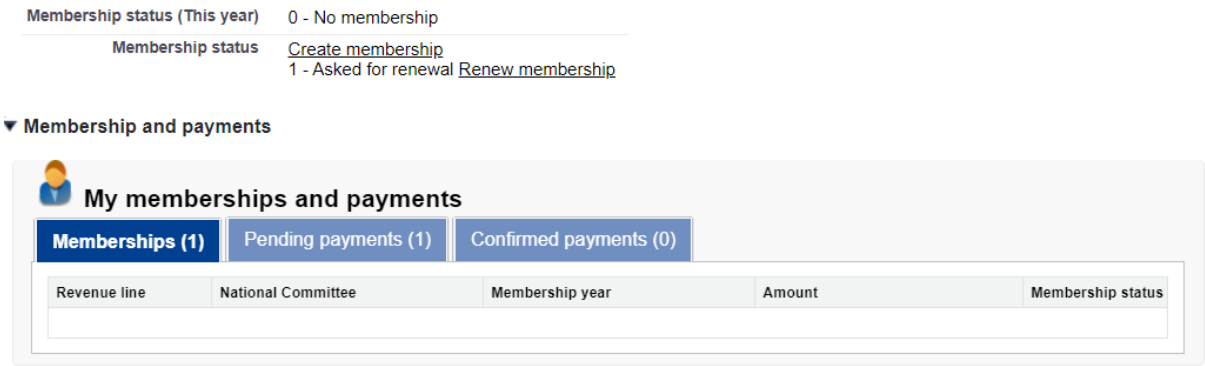
The different values of a membership

- A membership can have four states:
  - 0 - No membership
  - 1 - Asked for renewal
  - 2 - Awaiting payment
  - 3 - Member

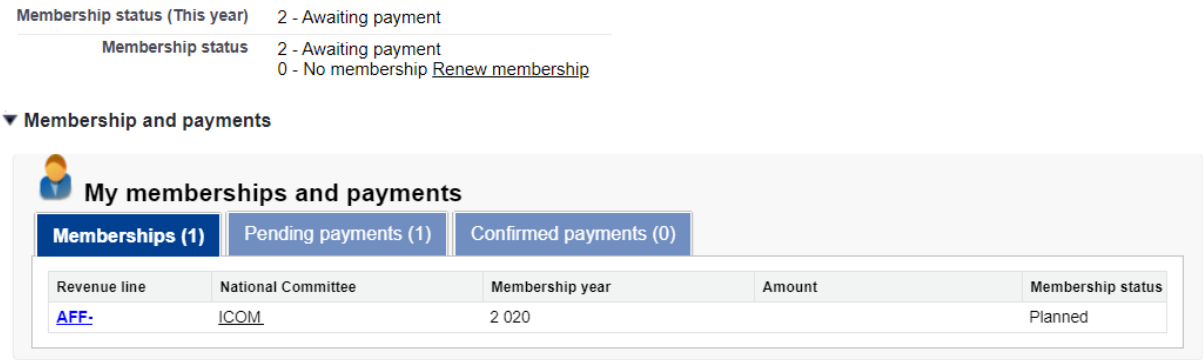
0 - No membership means that the member has no revenue line registered on its file. This value can be displayed for the current year and the next year:



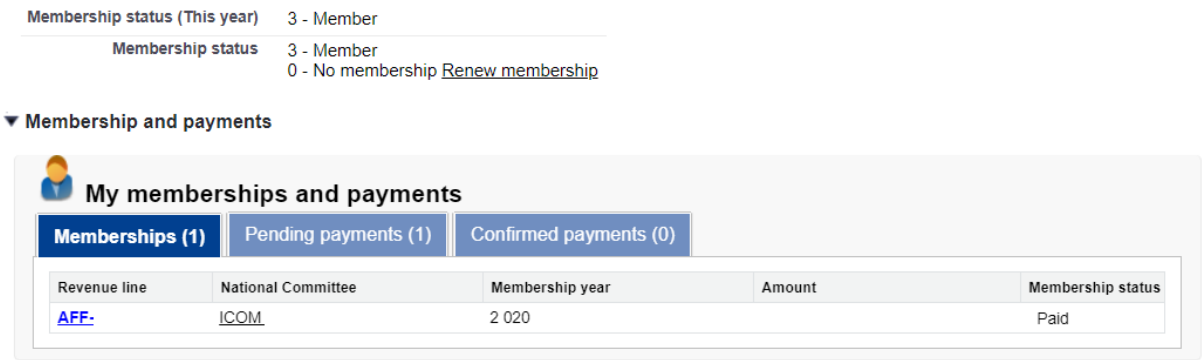
1 – Asked for renewal means that the member has asked for the renewal of its membership. This value is displayed for the next year:



2 – Awaiting payment means that the payment has to be validated either by the National Committee or by the Secretariat.

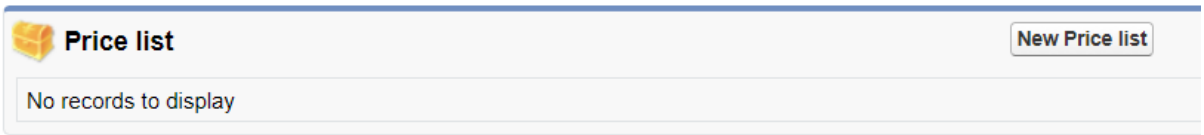


3 – Member means that the payment has been validated either by the National Committee, and in this case the transfer of the fees may have or not been sent to the Secretariat, or by the Secretariat, and in this case it also validate that the transfer of the fees by the National Committee to the Secretariat has been done.

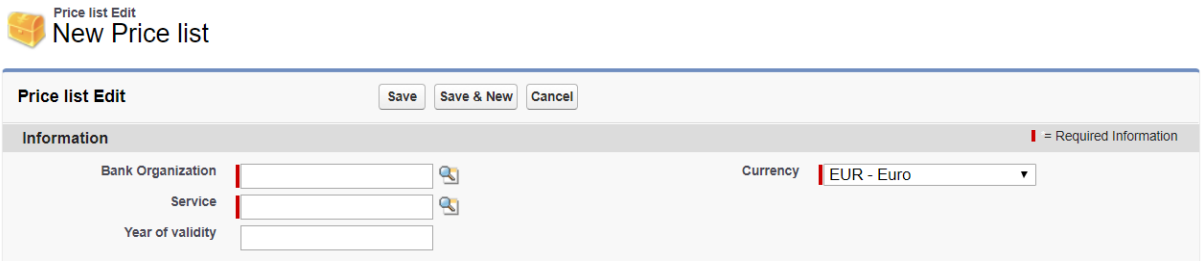


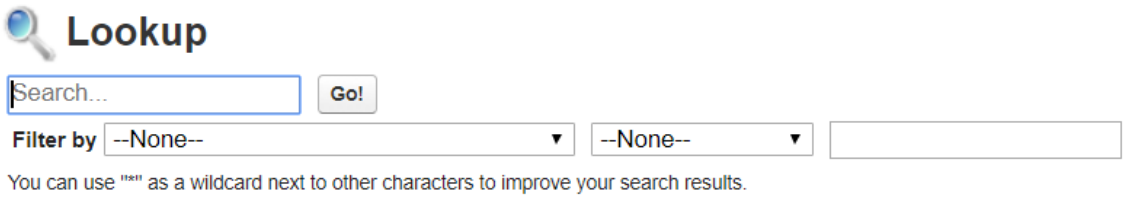
The Price List

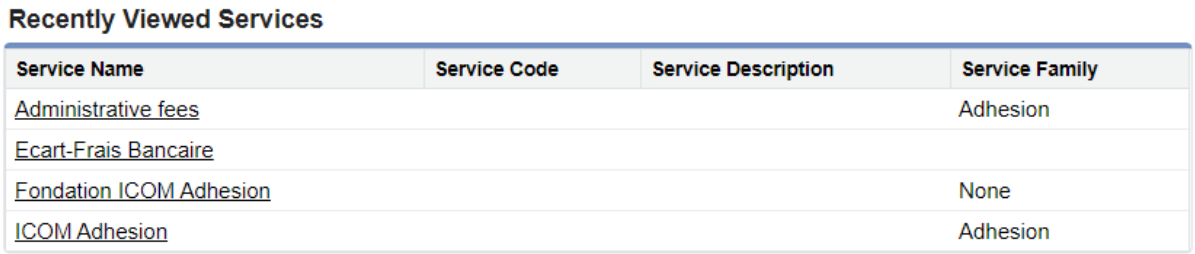
- At the bottom of the **Bank organization** page (refer to the introduction of this paragraph), you find the **Price list** section which displays the price lists of your National Committee. It is important to fill in a price list for each membership year. Otherwise no amount will be displayed in the payment line of the member. If you do not indicate the membership year in the price list, this price list will be used for all membership years.



- To create a new price list, click on the **New Price list** button. The **Bank Organization** field should display the Recipient organization of your Committee.
- In the Service field, click on the magnifying glass icon and select **ICOM Adhesion**.
- If in the Currency dropdown list the currency of your country doesn't appear, please contact the membership department at the address: **membership@icom.museum**. The currency will be added swiftly.
- You can indicate the **Year of validity**. If not, the price list will be used to create the payments of the members of your committee, whatever the year of membership.



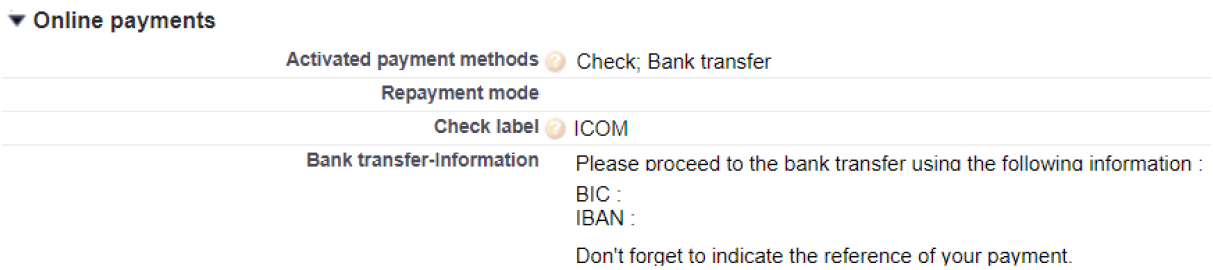




The wording displayed on IRIS for the members

- To display useful information about payment, on IRIS for the members, you need to:
- Open the file of your National Committee
    - Click on the **My national committee** tab:

- Scroll down to the **Membership renewal and Payment information** section,
- Click on the **Recipient organization** link.
- On the **Online payments** section, fill in the fields **Check label** and **Bank transfer-information**. Please find below an example:

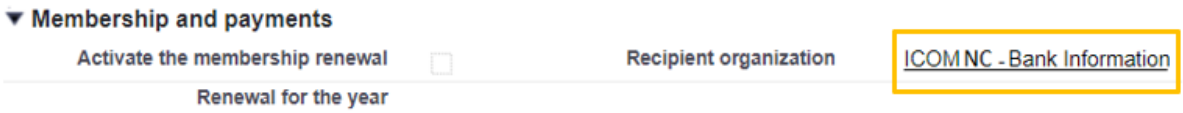


Management

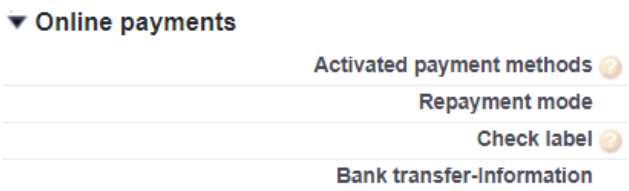
How to add an online payment for the members?

- If you want that the members of your Committee give you the information about how they intend to pay their membership, you have to follow the following steps:
  - Click on the **My national committee** tab:

  - Scroll down to the **Membership and payment** section and click on the **Recipient Organization** link.

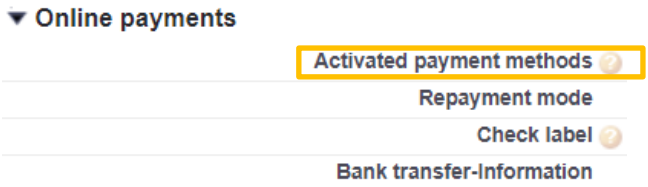


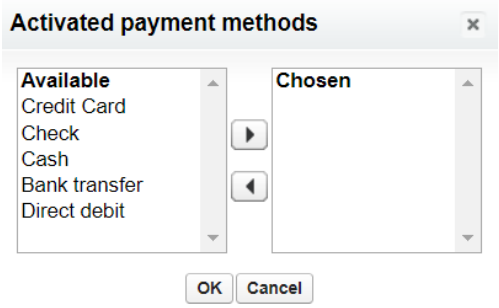
  - On the displayed screen you have a section named **Online payments**.



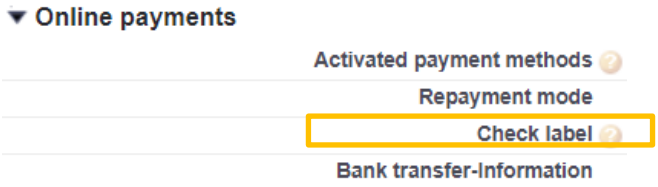
In this section you can:

- Activate the payment methods you want to offer to your members by double-clicking on the field **Activated payment methods** and selecting them. Please note that you can select the **Credit Card** payment method *only* if it has been implemented by the Secretariat.

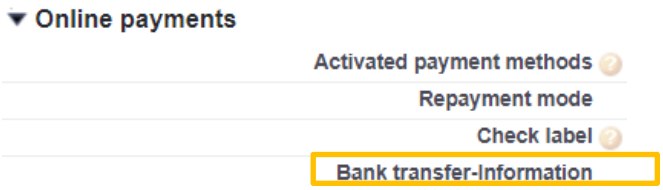




- Indicate the name to whom the checks are payable to by filling the field **Check label**.

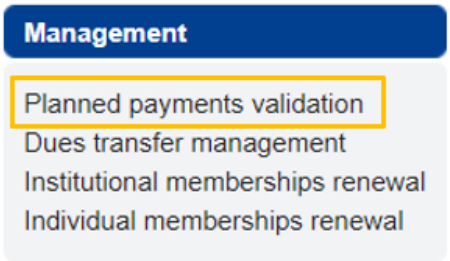


- Indicate the bank information for bank transfers by filling the field **Bank transfer information**.

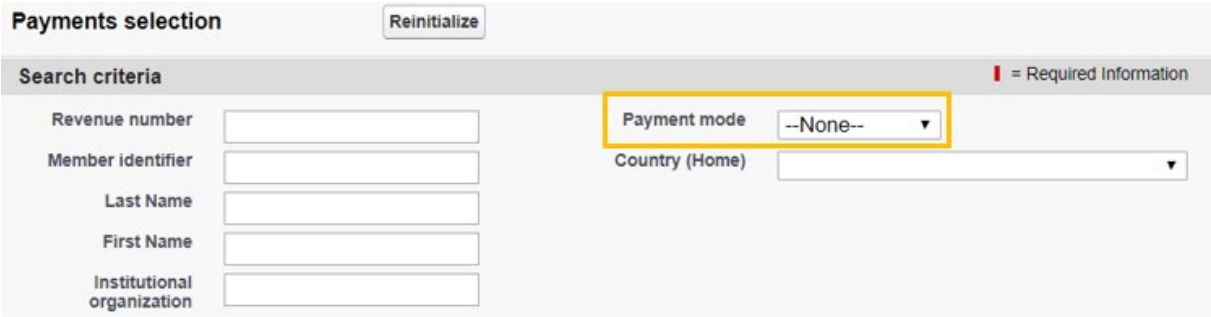


Payments by cheque

- If you have activated this payment method, your members can indicate on IRIS that they are going to send or have already sent a cheque to your Committee for the payment their membership.
- As this is a manual way to pay a membership, IRIS cannot update the status of this type of payments. Which means you have to do it manually.
- At this step you can search in IRIS the name of the member who has sent a cheque to you and update the status of the payment or use the IRIS view implemented to help you in this task.
    - This view is accessible by clicking on the **Planned payments validation** link.



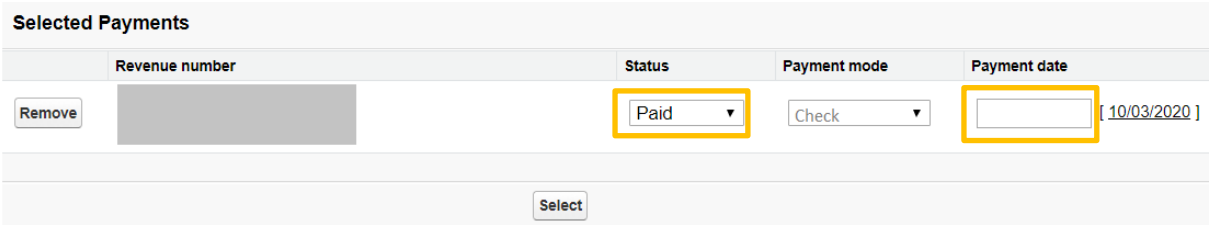
    - To see the cheques that your members will send or have already sent to your Committee you have to, in the **Payments selection** section, click on the drop-down list **Payment mode** and select the **Check** option. If you need to find a specific cheque. You can use the other fields to filter the list displayed on the **Search results** section.



- To update the status of a payment, you have to tick the corresponding check box and click on the **Select** button.

- The selected payments are instantly displayed on the **Selected Payments** (top of the window) section where you can enter the date of the payment in the **Payment date** text field. The status of the payment is automatically switched from *planned* to *paid*.
- By clicking on the **Select** button, you register the status and the payment date of the membership.

For information, and as it is described on the next chapter, all the payments with a status equal to **Paid** are added to the list of dues to transfer to the Secretariat.



Payments by bank transfer

- The management of a payment done by Bank transfer is similar to a payment done by cheque. Indeed, for this payment method, you need to check that a payment has been transferred to the bank account of your Committee, update its status on IRIS and indicate the payment date.

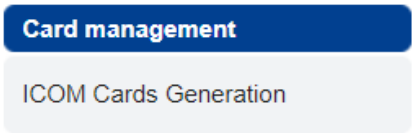
Payments by credit card

- The implementation of this online payment method has to be validated and configured by the Secretariat. Therefore, before activating this payment method, you need to contact the Secretariat to know if this solution can be implemented for your Committee.
- For this payment method, the status and the payment date are updated instantly and automatically on IRIS, as soon as the payment has been validated by the online payment solution.

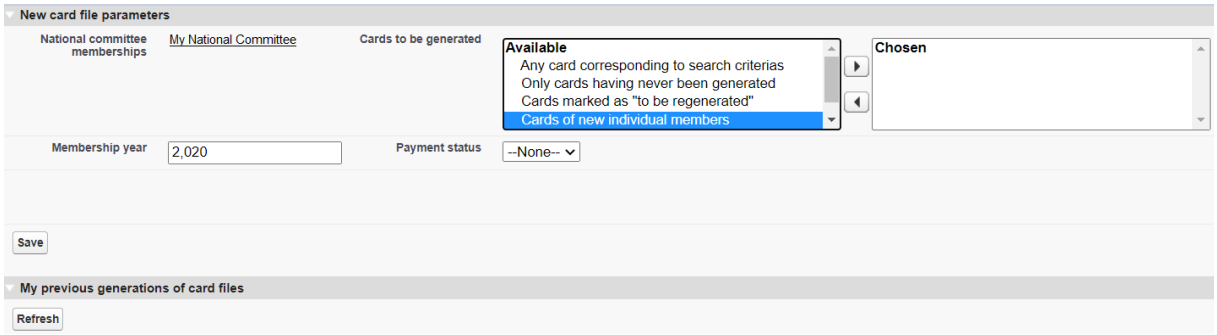
Cards

How to ask the cards to the Secretariat?

- Send to the Membership department the list of your new members. The Membership department will proceed to the manufacturing of the cards and send them to your National Committee.
- You can create this list yourself, but you can also ask IRIS to generate it for you. For that follow the steps below:
    - On the left side bar, click on the **ICOM Cards Generation** link.



    - On the screen displayed, double click on the **Cards of new individual members** or **Cards of new institutional members** option,
    - And click on the **Save** button.

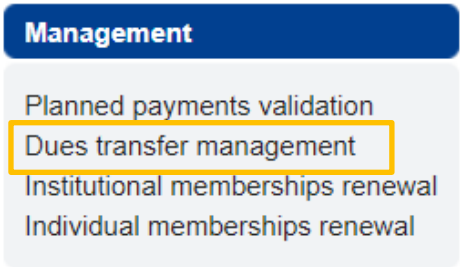


- A downloadable document will be generated under the **My previous generation of card files** section. Download it and send it to the Secretariat.

Dues

How to manage the dues transfer to the Secretariat?

- All dues transfer must be done by bank transfer from the Bank of the National Committee.
- Even if IRIS cannot substitute your bank, you can use it to prepare the dues transfer that your National Committee plans to send to the Secretariat or indicate the dues transfers that your National Committee has already sent to the Secretariat.
- All payments with a status equal to **Paid** are instantly added to the list of the dues transfer to be transferred to the Secretariat.
- You can see these dues transfer by clicking on the **Dues transfer management** link.



The page displayed shows:

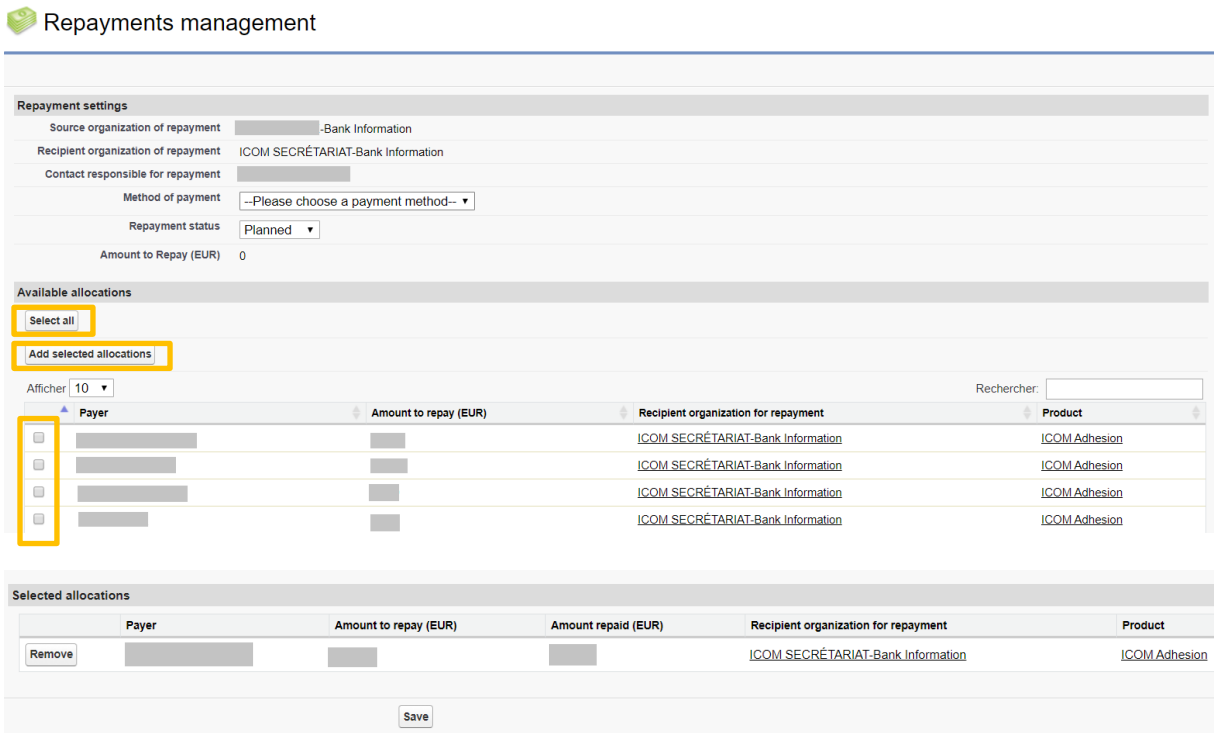
- The **Source organization of ~~repayment~~ transfer** which is your National Committee.
- The **Organization of ~~repayment~~ transfer** which is the Secretariat.
- The **Contact responsible for ~~repayment~~ transfer** who is the manager of your National Committee, that is to say yourself.

This view allows you to prepare a transfer to the Secretariat or to indicate to the Secretariat that you have already made it.

Prepare a transfer to the Secretariat

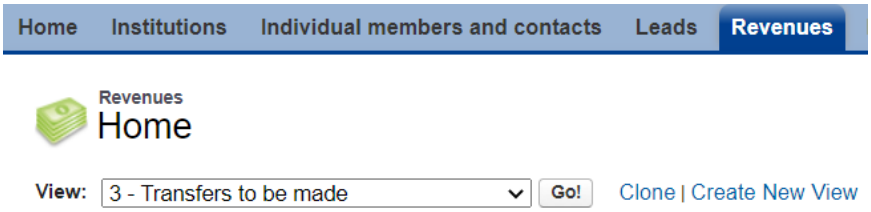
- To prepare a transfer to the Secretariat you need to tick the checkboxes corresponding to the transfers to the Secretariat you want to make and click on the **Add selected allocations** button. If you want to select all the transfers to the Secretariat that can be done for your National Committee, just click on the **Select all** button.
- The selected allocations are displayed on the **Selected allocations** section.
- To save the transfer to the Secretariat, click on the **Save** button.

Saving a transfer to the Secretariat creates two revenues: a positive one with the ICOM SECRÉTARIAT as the **Target recipient organization** and a negative one with the National Committee as the **Target recipient organization**.



Update the status of a transfer to the Secretariat

- Once you have actually paid the dues to the Secretariat, you can change the status of the transfer to the Secretariat to **Paid**. To do that, click on the **Revenues** tab, select the view **3-Transfers to be made** and edit the transfer to the Secretariat.



As soon as you indicate the transfer to the Secretariat as **Paid**, the Secretariat is informed and will indicate the transfer as **Confirmed** as soon as the payment is credited in its bank account.

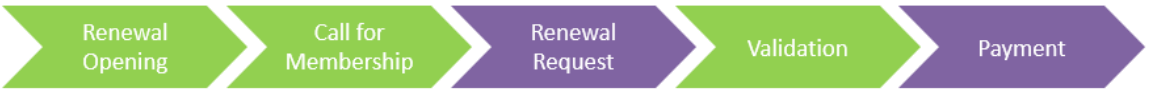
The Excel file

- If you do not want to manage the transfers to the Secretariat, you can send an Excel file which format is provided by the Membership department, listing the members for whom the transfers have been sent to the Secretariat.
- As the data in this Excel file replaces the corresponding information already registered in IRIS, please, take care to send updated data.
- The import of this file will update the status of the payments. Therefore, if you choose this method to inform the Secretariat that your National Committee has repaid its dues, there is no need to update manually the status of the payments of your members.

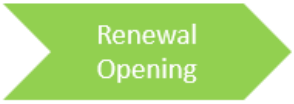
Renewals

How to renew the members of my Committee?

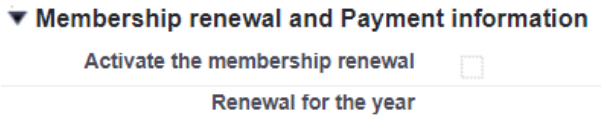
- The renewal of the memberships can be illustrated in five steps as follows:



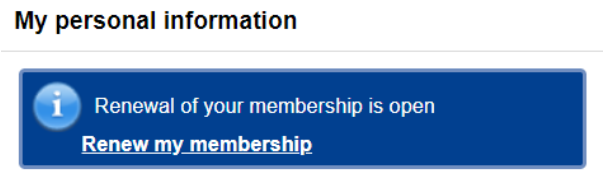
Step nº1: Renewal Opening



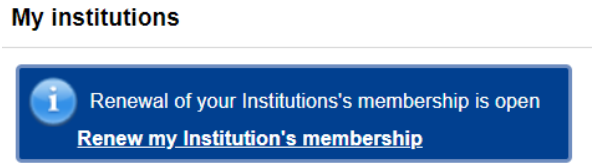
- To renew your members, you have to tick the checkbox **Activate the membership renewal** and indicate the year for the renewal in the field **Renewal for the year**. You will find these fields on the **Membership renewal and Payment information** section, on the file of your Committee.



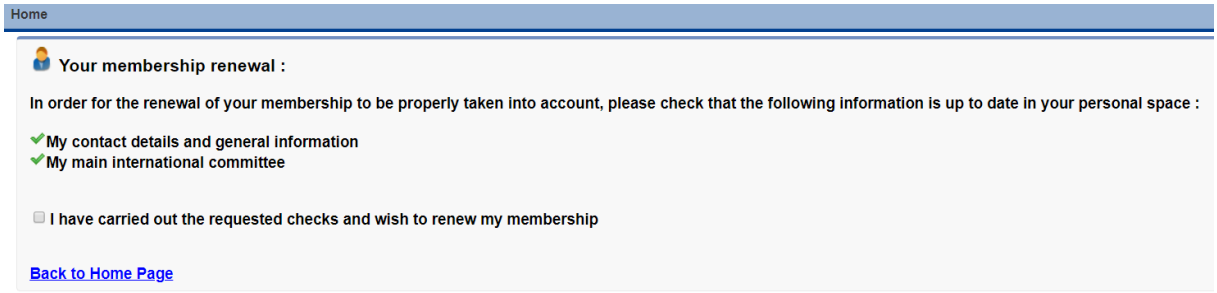
- These combined actions generate on IRIS, for the members of your Committee, a button that once clicked on creates, in IRIS a request for the renewal of the membership.
- This button is displayed:
  - On IRIS for **individual members** who are in good standing for the current year:



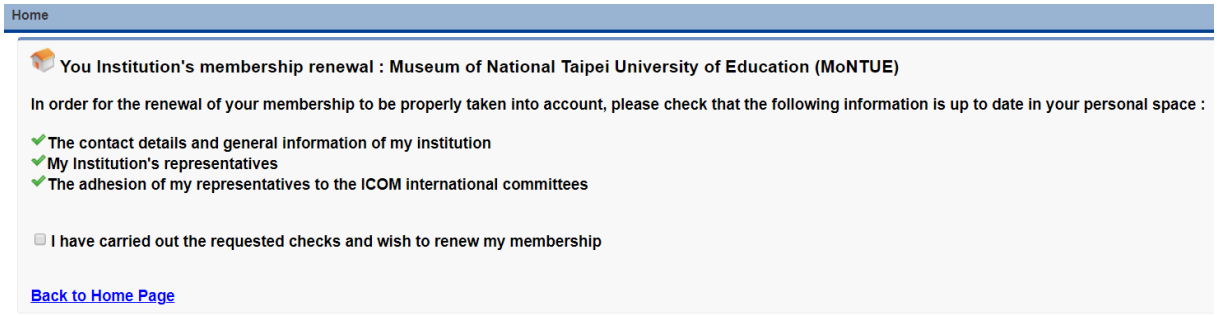
  - On IRIS for the **managers of an institution** in good standing for the current year.



  - When the member clicks on that button, the following page is displayed:
  - For an individual member:

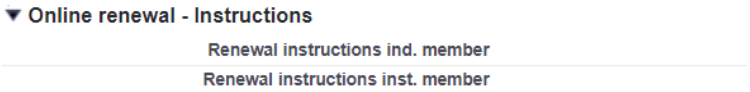


- For the manager of an institution:

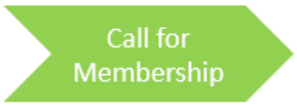


- These two pages can be configured on the **Bank information page** of your Committee. For that you need to open the file of your Committee, scroll down to the **Membership and payments** section, and click on the **Recipient organization** link.

- On the displayed page, scroll down to the **Online renewal – Instructions** and double click on the fields **Renewal instructions ind, member** and **Renewal instruction inst. member** to enter information you would like to share with your members.



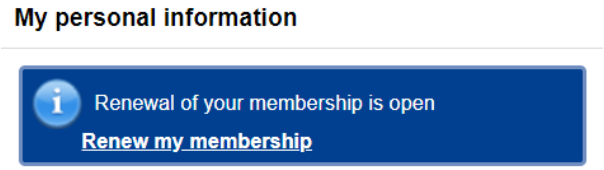
Step nº2: Call for Membership



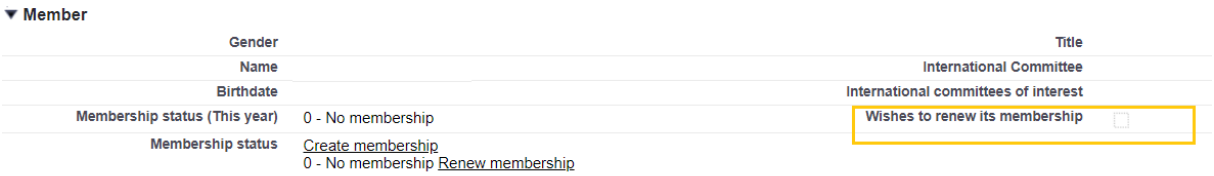
- Export the list of your members and send them an email to inform them that the opening for the renewal of their membership has started. IRIS is not an emailing tool. Therefore, you need an emailing tool to send your emailing.

Step nª3: Renewal Request

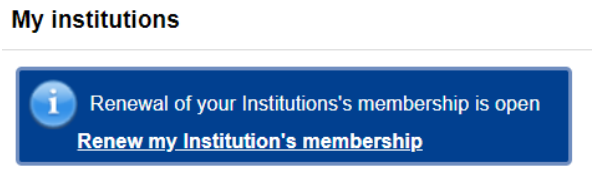
- The member logs onto IRIS.
- If the member is an individual member in good standing for the current year, the following button is displayed on IRIS:



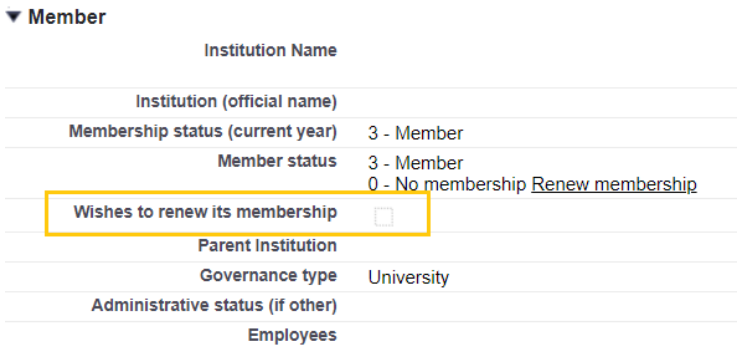
- If the member confirms he or she wishes to renew its membership, the information is updated in real time on the IRIS file of the individual member:



- If the member is the manager of an institutional member in good standing for the current year, the following button is displayed on IRIS:



- If the member confirms he or she wishes to renew the membership of its institution, the information is updated in real time on the IRIS file of the institutional member:

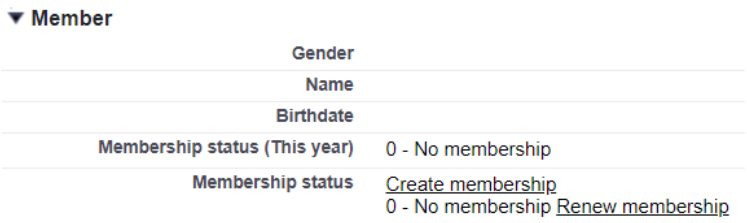


Step nº4: Validation

- The validation of renewal requests can be done manually or semi-automatically. Let us see how these two methods work.

Manual validation

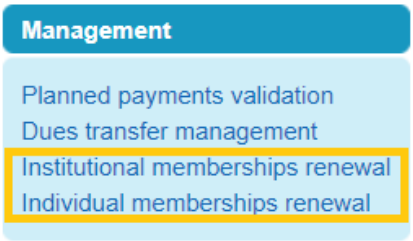
- Open the file of the member, scroll down to the **Member** section and click on the Renew membership link.



Remark: If you want to use this method for all your members, you do not need to ask them to do the step nº3. Just ask them to send an email to you indicating if they agree or not to renew their membership, attaching to their message all the documents you need to check if their request for renewal responds to the membership criteria of your National Committee.

Semi-automatic validation

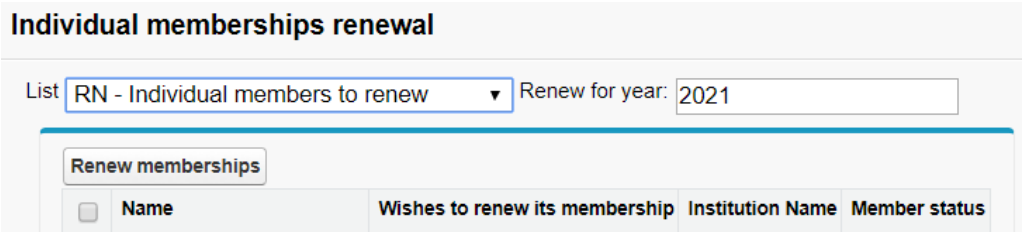
- On the left of the screen, click on the link:
- **Institutional membership renewal** for the renewal management of the memberships of the institutional members of your Committee,
- Or on the link **Individual memberships renewal** for the renewal management of the individual members of your Committee.



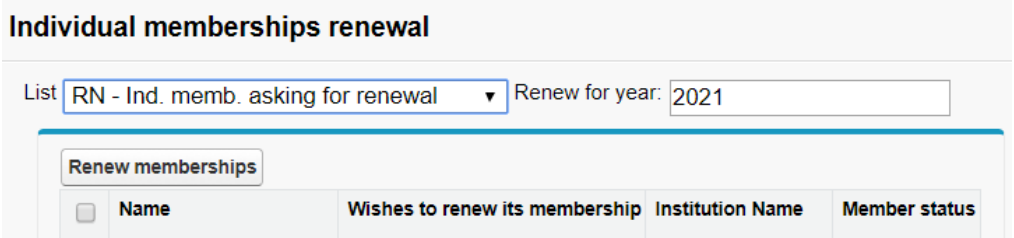
Individual memberships renewal

The page displayed shows two lists:

- The individual members to renew, corresponding to the individual members in good standing of your National Committee.



- The individual members asking for renewal

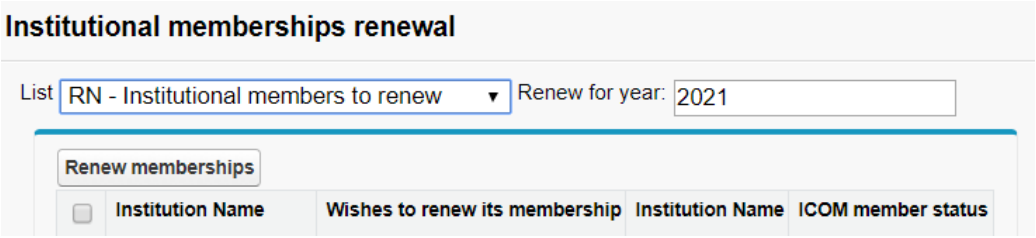


To renew the members, you can either check all the check boxes to renew all your members without checking if their situation still responds to the membership criteria of your National Committee, or tick the checkboxes one by one after having checked for each of your members that their situation still responds to the membership criteria of your National Committee.

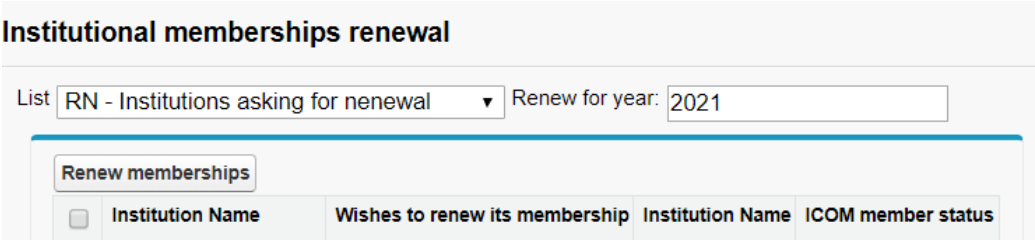
<u>Institutional memberships renewal</u>

The page displayed shows two lists:

- The institutional members to renew, corresponding to the institutional members in good standing of your National Committee.

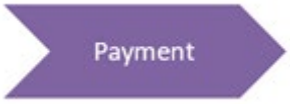


- The institutional members asking for renewal



To renew the members, you can either check all the check boxes to renew all your members without checking if their situation still responds to the membership criteria of your National Committee, or tick the checkboxes one by one after having checked for each of your members that their situation still responds to the membership criteria of your National Committee.

Step nº5: Payment



- Once the renewal request is validated by the manager of the National Committee, the member is invited to pay its membership to its National Committee.