

These are instructions for separating Foray fees and membership dues when paid together via AffiniPay on **Wild Apricot**. This process requires “Membership manager” privilege.

*Note that “Event manager” privilege is required to manage an event page, including registering new participants. Instruction for that process are on the next page.*

1. Select Admin View
2. On left menu navigate to and select Members / List
3. Select List view
4. Search for and select specific user’s account
5. For Household membership, make sure to select bundle administrator
6. **If Invoice for membership renewal exists, Skip to Step 12.**
7. Under “Membership” tab, select “Renew”
8. check that new renewal date is correct; change if necessary
9. press “Save” (upper left)
10. in yellow box, select “Generate invoice”
11. in subsequent “Add invoice” screen, select “Save” (do not make any changes)
12. **Make a note of Invoice number: “Invoice details (0xxxx)”**
  
13. Get back to user’s account screen.
14. Select “Account statement”
15. Find and select “Event registration” Invoice for Foray payment
16. While viewing Foray Invoice, select “Edit”
17. Change 2<sup>nd</sup> line item (for membership) to \$0.00 and
18. Edit field to state something like “Individual (or Household) Membership renewal - Invoice xxxx (from **note 12** above)” and amount (\$20 or 30)
19. Select “Save”
  
20. A box will open which states “New amount is less than already settled ...”
21. Click “OK”
22. You will return to Invoice details Screen. Click on “Back” (upper left)
23. This will put you back to user’s Account statement.
24. Select Payment entry for Foray (will probably include “Wild Apricot Payment”)
25. At top of screen or lower right, select “Settle”
26. This will open a box with option to settle two invoices:  
one for event reg and one for membership renewal.
27. Click “Settle” button next to either one.
28. A window will open showing “Payment details” and “PARTIALLY SETTLED.”
29. At bottom right (below “Available balance”) select “Settle” button.
30. Another “Payment settlement” window will open.
31. Select “Settle” button again.

Window should appear with stamp that Payment is “Settled”

That’s it for separating membership renewal from concurrent Foray payment.

## Manually Adding users to Event Registration on Wild Apricot

These are instructions for adding user(s) manually to Event registration, and address specifically the Registration Form for the 2022 Foray. They may need to be modified to work with more recent Foray registration forms. This process requires “Event manager” rights.

*Note that “Membership manager” privilege is required to create or modify member accounts. These instructions work only when member accounts are already in place.*

There are (at least) two possibilities to consider when setting up a new registration:

- 1: Member(s) have submitted registration and check by mail.
- 2: Member is the second name on a two-person registration.

The process varies for each. Read instructions—including Notes—before proceeding.

1. Select Admin View
2. On left menu navigate to and select Events/ Events list
3. Select desired Event (upcoming Foray)
4. Click on “Registrants & Invitees” tab
5. On top menu, select “Add registrant” button
6. Person to be added should already be a member, so choose “Select existing contact”
7. Find member’s name in list, highlight, and press “Select.”
8. Registration form will open.
9. (For Foray) under “General” select “Annual Foray” Ticket type.
10. Add notes in box directly underneath.
11. Select radio button for “NMMS membership current” (even if this is incorrect, it is more easily addressed separately.)
12. Add number(s) to appropriate boxes under “Foray Fee(s)”
13. Click any addition boxes for which you have information.
14. Select “Save”
15. In subsequent Event registration page, select “Generate Invoice”

### Additional Notes:

Record for receipt of mailed check can be created before or after invoice is generated, and can be balanced concurrent with event registration or at a later time.

*Important:* If this entry is for the second person of a dual Foray registration, leave “Foray Fee(s)” selections empty, and *do not* generate an Invoice. Both Foray fees will be included on Initial registrant’s record and Invoice.