Anchorbase/greekbill Integration Guide

We are pleased to announce that the Anchorbase and greekbill 2.0 integration has come to fruition. With that there will be some new occurrences happening to greekbill when you add or modify someone in Anchorbase.

What to expect?

1. New members will now automatically populate in greekbill once submitted through Anchorbase.

    ➢ What if I already submitted my chapters new members for this year? Don't worry, greekbill will be pulling any previously uploaded new members behind the scenes. Meaning, your greekbill roster as of today should be up to date.

2. When a current member's status is changed (resigned, expelled, graduated, etc.) this will now be automatically indicated in greekbill once their new status is uploaded to Anchorbase. The seven possible "Member Types" (status') a woman can fall under within greekbill are:

    - Abroad
    - Graduated/Alumni
    - Live In
    - Live Out
    - Member
    - New Member
    - Resigned/Expelled

    ➢ What about if a woman receives EAS status? What about transfers? Greekbill is working diligently to ensure that these member types are available soon.

➢ What if the member type I am seeing on greekbill is different from what I believe it should be? For instance if Jane Doe resigned recently and is still displaying as a "Member" in greekbill, the vp: finance should confirm with their vp: social standards or vp: communications.

How is the data we are inputting into Anchorbase coming through to greekbill?
Synchronization. Anchorbase and greekbill's information should mirror one another. That being said, we have taken the guess work out of double checking both platforms and have created a solution that allows both Anchorbase and greekbill to reflect the exact same information efficiently and accurately. That means less data entry for you and it reduces the likelihood for human error to occur when an exorbitant number of women need to be added, edited, etc.

➢ Please note that the information you input to Anchorbase will upload to greekbill at the <u>top of each hour</u>. Therefore, if you make a status change to Jane Doe at 10:30 a.m. in Anchorbase, her updated status would appear in greekbill at/after 11 a.m. If you were to update Jane Doe's status in Anchorbase at 10 a.m., the change will not be visible in greekbill until 11 a.m.

How to add new members in Anchorbase?
Task completed by:
- vp: member education
- director of new members

Read the [How to Update Your Anchorbase Roster](#) guide.

How to submit member status changes in Anchorbase?
Task completed by:
- vp: social standards for …
  - resignations,
  - 5th Year Alumnae Status,
  - Academic Professional Status (APS),
  - removal no resignation form roster changes

- vp: communications for …
  - graduates
  - member transfers, including:
    - to schools with a Delta Gamma chapter,
    - to schools without a Delta Gamma chapter,

▪ or women who will no longer be enrolled in school

➢ If you are experiencing that an individual's "Member Type" (Resigned/Expelled, Member, New Member, etc.) in greekbill is different from what you anticipated please reach out to your vp: social standards for confirmation and guidance as to where a woman maybe in the status change process.

Where to find your Anchorbase updated information in greekbill?
1. Log into greekbill 2.0
2. Select "Members" on left hand side
3. Click "Member Roster"
4. Select "More Views"
5. Click "Member Type/Sub Type/Billing Type"
   - All *new members* that were added within the last hour should populate.
   - All *status changes* that were added within the last hour should populate.

➢ If you are experiencing difficulties displaying an individual, ensure that the filters at the top of your page are selected to "All."

Where can I find a person's payment history information in greekbill?
1. Log into greekbill 2.0
2. Select "Members" on left hand side
3. Click "Member Roster"
4. Select "More Views"
5. Click "Member Type/Sub Type/Billing Type"
6. Select the name of the individual you want to view
7. Next page will list the person's "Account History" including:
   a. Invoices
   b. Due dates
   c. Payments made
   d. Pending charges
   e. Current account balance

➢ Please note that a person's account history has not been impacted by the Anchorbase/greekbill integration. Specifically, financial information is still only stored in greekbill at this time.

Where can I find a person's personal information in greekbill?

1. Log into greekbill 2.0
2. Select "Members" on left hand side
3. Click "Member Roster"
4. Select "More Views"
5. Click "Member Type/Sub Type/Billing Type"
6. Select the name of the individual you want to view
7. Click on the "Basic Details" tab in the upper left-hand corner
   a. "Basic Details" include:
      i. Home address
      ii. Mobile phone number
      iii. Primary e-mail
      iv. Emergency contact information

How is this synchronization helping me?
1. Member status changes for the categories listed below are now available in greekbill under, "Member" then "Member Roster" the "Member Type" will display on their row.
   a. Abroad
   b. Graduated/Alumni
   c. Live In
   d. Live Out
   e. Member
   f. New Member
   g. Resigned/Expelled
2. Contact your RFS to complete any open MAAs or use the any changes to "Member Type" to start an MAA to complete adjustments to their account for billing and roster updating purposes.

What to expect in the future:
1. Greekbill plans to add additional "Member Types" including:
   - APS
   - EAS
   - transfer

2. Anchorbase is now synced to greekbill, but soon greekbill will be able to sync back to Anchorbase. This would allow any updates/edits you made in greekbill to automatically populate in Anchorbase and vice versa, which would increase convenience for all.

Where can I receive guidance if I have questions?
1. Greekbill

- When you log into greekbill 2.0, your greekbill representative's picture and contact information is listed. Please feel free to reach out to your representative at anytime for guidance and support.
2. Executive Offices
   - Executive Offices is happy to help with any of your questions, comments or concerns about the integration of Anchorbase/greekbill. Please do not hesitate to ask.
3. Visual Guide
   - If you want a visual outline of where to find your Anchorbase entries in greekbill, please refer to this guide: https://www.deltagamma.org/library/handbookGuideManual/anchorbase-greekbill-integration-visual-guide