



Anchorbase and greekbill Integration

VISUAL GUIDE

To get started, log into greekbill 2.0 and click **"Members"**:

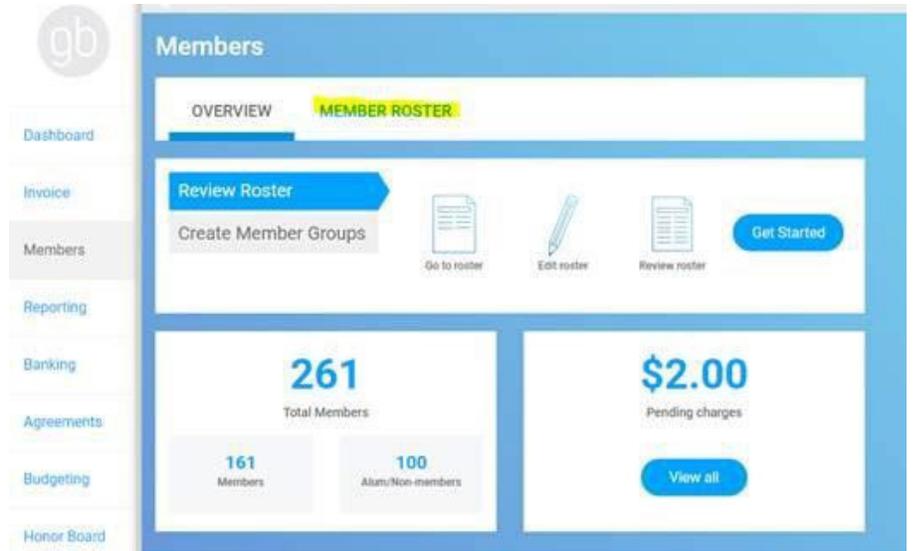
The screenshot shows the greekbill 2.0 dashboard. On the left is a navigation menu with options: Dashboard, Invoice, **Members** (highlighted), Reporting, Banking, Agreements, Budgeting, Honor Board, and MAA. The main content area is titled 'Dashboard' and includes a 'Create Charges' button, 'Review Roster', and 'Create Member Groups'. A three-step process is shown: 1. Create your charge, 2. Assign to members, 3. Send your invoices, with a 'Get Started' button. Below this are several data cards: 'Total Member Groups' with a table, 'Total Members' (261) broken down into 161 Members and 100 Alum/Non-members, 'Next invoice date' with last and next due dates (07/08/2015 and 09/10/2015), and 'Pending charges' (\$2.00) with a 'View all' button. At the bottom are three sections: 'Charges', 'Member Roster', and 'Checks & Deposits'. A user profile for Camya Ross is visible in the bottom left corner.

Group Name	# of Members
Members	0
New Member	0
Other	0

Category	Count
Members	161
Alum/Non-members	100

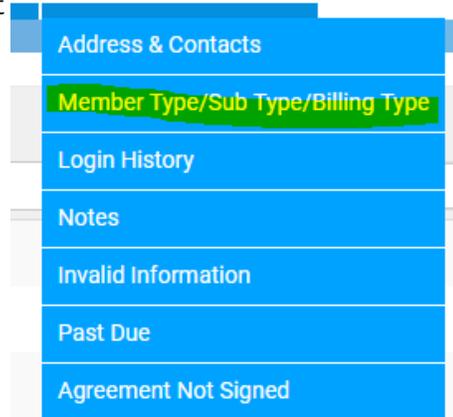
Date	Type
07/08/2015	Last invoice date
09/10/2015	Last due date

From here, you are going to click **“Member Roster”**:



MORE VIEWS ▾

To see an outline of all the available information, select **“Member Type/Sub Type/Billing Type”** under **“More Views”**:



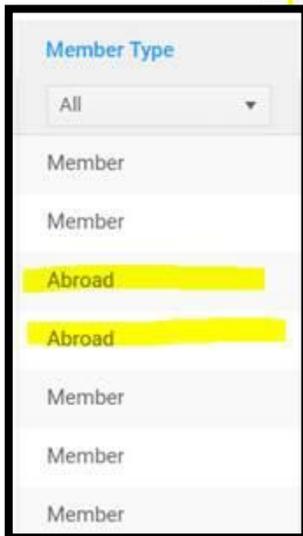
From here you will be transported to all the women listed on your roster:

Member Roster - DG Demo Region 1

BASIC VIEW BILLING VIEW **MEMBER TYPE/SUB TYPE/BILLING TYPE** ▾ Start Bulk Edit

Name	Member ID	Member Type	Sub Type	Billing Type	Member Status	System Status	
ALDRIDGE, HANAH	939500	Member		Ebill Only	Member	ON	Edit
ALDRIDGE, HANAH	2053797	Member		Ebill Only	Member	ON	Edit
CLAUSEN, LAUREN	939498	Member		Ebill Only	Member	ON	Edit
COSME, DANIELLE	939506	Member		Ebill Only	Member	ON	Edit
DELSIGNE, ERIN	939503	Member		Ebill Only	Member	ON	Edit
DONOVAN, RILEY	939502	Member		Ebill Only	Member	ON	Edit
GOH, SERENA	939501	Member		Ebill Only	Member	ON	Edit
KATO, SARA	939505	Member		Ebill Only	Member	ON	Edit
RACIAK, ASHLEY	939504	Member		Ebill Only	Member	ON	Edit
SNYDER, SARAH	939497	Member		Ebill Only	Member	ON	Edit

10 items



A woman's member type will sync with greekbill within an hour of being updated in Anchorbase.

Member Types include:

- Abroad
- Graduated/Alumnae
- Member

- New Member
- Resigned/Expelled
- Live In
- Live Out

The screenshot shows the GreekBill dashboard for Delta Gamma - Alpha Chi at Pennsylvania State University. The main content area is titled 'MEMBER ROSTER' and includes a 'Review Roster' button, a 'Create Member Groups' button, and three icons for 'Go to roster', 'Edit roster', and 'Review roster'. A 'Get Started' button is also present. Below this, there are two summary cards: one for 'Total Members' showing 261 (with sub-cards for 161 Members and 100 Alum/Non-members) and another for 'Pending charges' showing \$2.00. A 'View all' button is located below the pending charges card. The dashboard is divided into a grid of six sections: 'Member Roster' (with a 'View' button), 'Member Groups' (with 'Add a group' and 'View all groups' buttons), 'Member Notes' (with a 'GO' button), 'Member Summary' (with an overview of all members, balances, and payment schedule), 'Member Status Change' (with instructions on making changes to member status), and 'Member Collection Form' (with instructions on submitting members into the collection process). A sidebar on the left contains navigation links for Dashboard, Invoice, Members, Reporting, Banking, Agreements, Budgeting, and Honor Board. A profile card for Camya Ross is highlighted with a yellow circle, showing her name, phone number (210-802-4614), email (cross@greekbill.com), and a 'Schedule a Call' button.

If you have any questions, please reach out to your greekbill representative. Her name and contact information are listed on your greekbill homepage.