

# CHAPTER ON THE STORE:

## HOW-TO'S AND BEST PRACTICES

Tuesday, April 5<sup>th</sup> 2022  
Lauren Sharrock - Membership Engagement Manager  
[Lsharrock@td.org](mailto:Lsharrock@td.org)

# What is Chapter on the Store?

A joint-membership initiative!

Members can purchase Chapter membership on National's website & are encouraged to do so in the checkout process & receive a discount on their National dues.

# What's in it for the Chapter?

- Helps you hit Joint Membership goals more easily
  - Lessens administrative burden on Chapters
- Helps us sell your memberships & market all Chapters to wider audience

# How does it work?

- The Chapter's CHiP code is automatically applied at checkout
- National either sends the Chapter a list of the new member information to the chapter for upload into WildApricot, or directly puts the information into the Chapter's database
- National sends the Chapter the collected dues and a report of sales on a monthly basis



Search

State Name

Chapter

\$50.00

66.6 miles away

REMOVE

Chapter

96.9 miles away

Contact

Chapter

\$50.00

145.7 miles away

Add To Order

Chapter

\$75.00

152 miles away

Add To Order

## From Your Shopping Cart

### ATD Membership - Professional

[Save for Later](#)

\$279.00


### Chapter Membership

[Save for Later](#)

\$50.00

**TOTAL:**

**\$329.00**

 **Checkout**

Taxes & Shipping Calculated at Checkout.

By advancing, you accept and agree to ATD's [Terms of Use](#) and indicated you have reviewed the [Privacy Policy](#).

Payment for this transaction is processed by Worldpay. More information on the Worldpay Privacy and Cookie Policy may be found [here](#).

# We are not on the Store – What do I need to do?

- Email Lauren Sharrock at [Lsharrock@td.org](mailto:Lsharrock@td.org)
- The process:
  - The Chapter makes edits to their WildApricot fields
  - The Chapter completes an agreement form
  - National establishes a connection between our database and the Chapter's WildApricot
  - The Chapter gives the final approval for launching on the Store

# We are on the Store - What do I need to do?

- Know who is receiving the Daily Import Files. Don't know?  
Email [Lsharrock@td.org](mailto:Lsharrock@td.org)
- Complete upload of Daily Import Files to WildApricot
- Do not change the fields in WildApricot that correspond to the fields in the Daily Import File. If you do, the information will not import correctly
- Let National know when you change your Membership Levels or dues amounts



Let's see it in action!



# Phase II of Chapter on the Store

- Makes the process even easier!
- Phase II allows us to import member data directly into your WildApricot!
  - You no longer need to do Daily Import File uploading
  - Ensures new member data is included in your database in a timely manner
  - Chapters still receive the weekly emails with a list of all new members that week. Need to periodically check that imports are working correctly.

It is our goal to migrate all Chapters on Phase I to Phase II in 2022. We will be sending out information on this change directly to chapter leaders soon.

# Common Pitfalls & Things to Avoid

- Do not change your Common Field or Membership Field names in WildApricot without checking them against the Import File field names
- Realize you haven't done your Daily Upload File import? Email Lauren to receive a bulk file to import. Specify the date range needed.
- Succession Planning & Training: When someone new steps into the role train them on these procedures!
- Best Practice: In order to keep your data clean frequently search for and void old open invoices.
- Save frequent searches in the Saved Searches area.



Let's see it in action!

# What to do right now

- Make sure the Daily/Weekly/Monthly emails are being received by someone on your Board
- If you are in Phase I, make sure Daily Import File uploads are being completed
- If you are in Phase I, talk with your Board about moving to Phase II
- If you are not on the store, talk to Lauren S. about getting on!



# Contact Information:

Lauren Sharrock  
Membership Engagement Manager

[Lsharrock@td.org](mailto:Lsharrock@td.org)

