



# Corporate Member Quick Start

## Getting Started With Your OBAP Corporate Membership

OBAP uses the NeonCRM platform to manage all aspects of our membership, donation tracking, and event registration. We call this system our OBAP Member Portal. As a Corporate/Company Member, you will be able to find all of your OBAP related information in one place. This quick start guide is intended to help you get going with the most widely used features of the system.

### Membership Management

As an OBAP Corporate Member, your membership consists of two parts.

- Your primary company member account (the “company”)- managed by your primary contact.
  - Your primary contact manages the company member account information such as membership renewals, event registrations for employees, and donation transactions for the company.
  - Your primary contact does not have to be one of the sub-members.
  - An important note is that within our system, anyone who interacts with OBAP can have an account, however not all accounts need to be “members”.
- Your sub-member accounts (the “people”) - typically up to 3 company employees or contacts you wish to be associated with your company member account. Sub-members of your company membership essentially share the same benefits of full OBAP members, but can not vote for OBAP ballot questions or elections.
  - Our system automatically scans our account database and looks for people who may be a part of your organization by using the “company” field in their profile.
  - This allows you to quickly add existing accounts as sub-members of your company membership.
  - You can also create accounts if the team members you wish to add don't already have one.



# Corporate Member Quick Start

## Adding Team Members To Your Company Membership

Setting up your account and members is easy.

- Create your company account (if you don't already have one)  
[Company Membership Registration Page](#)
- Create sub-members (or add existing accounts from our system)
  - In the contact list, look for the employee you would like to create/renew a sub-membership for. Then select the check box and click join or renew.
  - If the contact you wish to add is not shown, click create, then complete the registration form. The new member will be able to change the answers to the profile questions, so don't worry if you're unsure of their preferences.
- Join/Renew sub-members.
  - Note the system will automatically align your sub-member's expiration dates with your company membership.

## Membership History

Membership	Start Date	End Date
Corporate Membership	01/31/2021	01/30/20

### Additional Sub Members & Memberships

Contacts: **Add** **Remove** Sub-Membership: **Join** **Renew**

**2** Action **3** Member ⇅

<input type="checkbox"/> <b>1</b>		John Smith
<input type="checkbox"/>	<b>Set as Non-Current Employee</b>	Joel E Webley

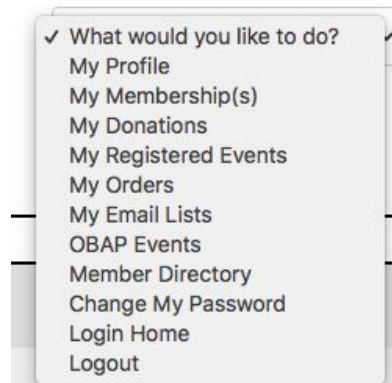


# Corporate Member Quick Start

## Registering Team Members For Events

A big part of the OBAP community revolves around our events. It's easy to get your team members registered to participate.

- Once you have your team member's accounts created, they can easily be added to event registrations
- The person registering your team for the event, does not have to be an event attendee.
- Start by navigating to the event page or in your member portal home page click the "what would you like to do?" drop down menu and select "OBAP Events".



- Click register then complete the registration form. Any of your sub-members will automatically be shown as options to register making it quick and easy.

### Event Registration

Event Name:

Dreams to Careers 2021

Event Date:

02/20/2021 CST - 02/20/2021 CST

Our system indicates the following employees are associated with your company. To register for your employees, select them below. Otherwise, click the "Continue" button below and you will be prompted to enter attendee names on the next page.

Check

Full Name

John Smith

Joel E Webley

Previous

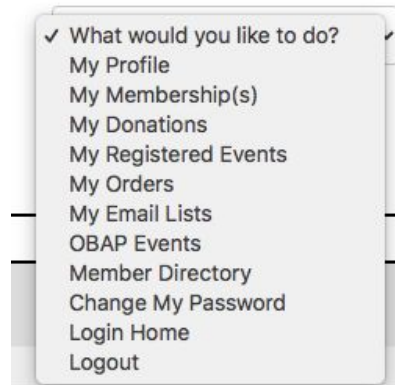
Continue



# Corporate Member Quick Start

## Registering Team Members For Events

- With your company member portal account, donating to OBAP is easy. You can even set up recurring donations.



- From the menu, select “My Donations”. You will be presented with your donation history and other options for making additional donations. Clicking the donation details link presents you with a print ready transaction receipt. Note: Your tax deduction letter will arrive via email when you complete a donation.

Your membership is currently active. [Details](#)

[Donate Now](#)

### Donation

**First Donation:**

02/09/2021

**Last Donation:**

02/09/2021

**Donation Total:**

\$1.34

### Recurring Donation:

[Set up recurring donation](#)

### History

Amount	Date	Status	Note	Transaction Details
\$1.34	02/09/2021	SUCCEEDED		<a href="#">Details</a>