VFW Auxiliary

MALTA Training
Auxiliary Treasurers
June 2017
VFW Auxiliary

Training Items

• Navigating to Duties
• Update Payment Method
• Update Dues Amounts
• Purchase Bond
• Get a List of Members
• Pay Annual Members Dues
• Correct a Mistake
• Convert a Member to Life

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Navigating to Duties
VFW Auxiliary

As a Treasurer you will find the Menu item ‘Duties’ Simply click this link to access your Officer Role(s)
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Update Payment Method
When you first log into MALTA you should check to make sure your Stored Payment Profile for your Auxiliary is correct.

To do this: Click ‘Stored Payment Method’
Your Auxiliary’s Bank Information will be listed.

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Name on Account</th>
<th>Account Number</th>
<th>Routing Number</th>
<th>Bank</th>
<th>EIN</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking</td>
<td>VFW Auxiliary 6957</td>
<td>****4566</td>
<td>101000019</td>
<td>COMMERCE BANK</td>
<td>123456789</td>
<td></td>
</tr>
</tbody>
</table>

Change History

<table>
<thead>
<tr>
<th>Date of Change</th>
<th>Changed By</th>
<th>New Account Type</th>
<th>New Name on Account</th>
<th>New Account Number</th>
<th>New Bank</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/29/2017</td>
<td>Kelly Member</td>
<td>Checking</td>
<td>VFW Auxiliary 6957</td>
<td>****4566</td>
<td>COMMERCE BANK</td>
</tr>
</tbody>
</table>
At any time you can move backwards using your ‘Breadcrumb’ Navigation
Check to make sure your Auxiliary’s Bank Information is correct.
If your information is incorrect, you may Edit the bank information. Click Edit.
Simply update the information for the Account and ‘Save Changes’.
You may cancel at any point.
If you need help identifying your Account/Routing Number, just click the check image to enlarge the sample check.
Update Dues Amount
The second thing you must check are your configured dues. Click on ‘Configure Dues’
You will see the portions of the dues for National, your Department and Local Dues. The Total Dues is the amount you should check. If it is not correct, click ‘Change Dues’
You will be presented with a prompt and you simply must enter the TOTAL amount of a check that a member would write to your Auxiliary Annually.
Enter the correct amount and click ‘Continue’
You will be presented with the breakdown of dues for your members. If it is correct click ‘YES’ if it is incorrect click ‘NO’ to re-enter the amount
VFW Auxiliary

Purchase a Bond
To Purchase a Bond for your Auxiliary, simply click: Purchase Bond
You will be presented with a screen to purchase the bond.
Step 1: Select the bond you wish to purchase and click ‘Purchase Bond’
Step 2: Enter the Bond Amount that you wish to purchase. The Premium Per Office and Total Due will automatically adjust.
Step 3: Select your Payment Method. eCheck (ACH)
Step 4: Click ‘Purchase Bond’
Step 5: Review the Payment Page and click the 2 checkboxes at the bottom.
Step 6: Click Purchase Bond
You will now see the receipt. You may Print the Receipt or download it to PDF. Your Bond Certificate will be available in 7 days.
Get a List of Members
To get a list of your members, simply navigate to “View Members” and click on the link.
You may search for a list or for an individual.
You may run a list of All Members, Annual, Life, Lapsed, Former etc. Select the option you want and click ‘Search’
Your list will show Member ID, Name, Membership, Expiration, Phone, Email and Current Address

<table>
<thead>
<tr>
<th>Member ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Membership</th>
<th>Expiration Date</th>
<th>Phone Number</th>
<th>Email</th>
<th>Current Address</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000048471</td>
<td>Adams</td>
<td>Jane</td>
<td>Annual</td>
<td>12/31/2017</td>
<td>(785)394-6451</td>
<td><a href="mailto:sbaker@baker.com">sbaker@baker.com</a></td>
<td>123 Main Baldwin City, KS 66006</td>
<td>Edit</td>
</tr>
<tr>
<td>2000161835</td>
<td>Baker</td>
<td>Susan</td>
<td>Annual</td>
<td>12/31/2017</td>
<td></td>
<td><a href="mailto:sbaker@baker.com">sbaker@baker.com</a></td>
<td>7603 Haskins Lenexa, KS 66206</td>
<td>Edt</td>
</tr>
<tr>
<td>9340088</td>
<td>Jones</td>
<td>Mike</td>
<td>Life Member</td>
<td>N/A</td>
<td></td>
<td></td>
<td>9516 Pine Lenexa, KS 66220</td>
<td>Edit</td>
</tr>
</tbody>
</table>

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You may download a list by selecting the columns you wish to view and clicking the format (CSV, Excel or Word) you would like your list in.
Pay Annual Members Dues
To process Membership Dues, Simply click ‘Process Membership Dues’
You will be presented with this page to determine how you would like to process dues.

**Process Membership Dues**

Recording the dues of a member on this page will result in a direct debit to the Auxiliary’s bank account by National Headquarters.

**NOTE:** All dues recorded will be for the 2016-17 Membership Year and Expire on December 31, 2017
Step 1: Select how you wish to process dues and click ‘Search’
Step 2: You are presented with a list of member(s) that meet your search criteria.
Step 3: Select the member(s) you wish to pay dues for.
WARNING! By paying their dues, you are initiating a debit to your Auxiliary’s Bank Account. Make sure their payment of dues is deposited in the Auxiliary’s Bank Account before marking the member paid.
Step 4: Scroll to the bottom of the list to see the total amount to pay. It will ONLY be the Department and National portion of Dues.

Total Amount: $42.00
Step 5: Select the payment method eCheck (ACH)

Step 6: Check the box to agree to the terms and click “Pay Dues”.

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Step 7: You will be asked to confirm that you wish to continue.

Are you sure you want to continue? This operation cannot be undone.

Yes  No
Step 8: You will receive a receipt with a list of the members who you have paid. They are now paid.

**PROCESSED MEMBERS RECEIPT**

Thank you for submitting payment for the member registration
Your transaction status is pending successful clearance of payment. You will receive notification via email when your payment has cleared.

<table>
<thead>
<tr>
<th>Date</th>
<th>May 29, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>200113197 -</td>
</tr>
<tr>
<td></td>
<td>2225365 -</td>
</tr>
<tr>
<td></td>
<td>2000085959 -</td>
</tr>
<tr>
<td>Total Amount</td>
<td>$42.00</td>
</tr>
<tr>
<td>Payment Method</td>
<td>eCheck (ACH)</td>
</tr>
</tbody>
</table>

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Correct a Mistake
If you made a mistake, simply navigate to “View Receipts”: 
If a transaction was processed today and it is before MIDNIGHT Central time you may ‘Void’ the transaction.

### Auxiliary Payment History

<table>
<thead>
<tr>
<th>Payment Type</th>
<th>Payment Date</th>
<th>Payment Method</th>
<th>Receipt Number</th>
<th>Recorded By</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Dues</td>
<td>5/29/2017</td>
<td>eCheck (ACH)</td>
<td>240</td>
<td>Kelly A Member</td>
<td>Void</td>
</tr>
<tr>
<td>Bond</td>
<td>5/29/2017</td>
<td>eCheck (ACH)</td>
<td>3415</td>
<td>Kelly A Member</td>
<td>Void</td>
</tr>
</tbody>
</table>
Step 1: Click Void next to Mass Dues
Note: you may void other items but this will walk you through Mass Dues
Step 2: Confirm this is the correct receipt and click ‘Void Payment’
Step 3: Select the individuals you wish to Void. You may ‘Select All’ to void the entire receipt or just a few members.
Step 4: You will be prompted to confirm that you wish to void this transaction.
Convert a Member to Life
If a member wishes to convert their membership to a Life Membership simply click ‘Convert to Life’
Step 1: Search for the member by Member ID, First or Last Name.
Step 2: Confirm that this is the member you wish to convert to life. You may select that it is a GIFT and input the Member ID of the individual giving the gift.
Step 3: Select the payment method eCheck (ACH)
Step 4: Check the box to indicate that you agree to the terms. And click Pay Dues
WARNING! By converting the member to a Life Membership you are initiating a debit to your Auxiliary’s Bank Account. Make sure their payment of dues is deposited in the Auxiliary’s Bank Account before marking the member paid.
Step 5: You are presented with a receipt which you may print or download.
There will be more training available on the Online Auxiliary Academy throughout the year.
Thank You