



VMN Admin Info Sheet

Chapter Dues Recordkeeping in Better Impact

*This Info Sheet is intended for Chapter Board Members in the VMN Program.
Authored by Virginia Master Naturalist State Office*

Introduction and Explanation

The Virginia Master Naturalist (VMN) State Office has created a custom field within Better Impact (BI) that chapters can use to track dues payments. Chapter are not required to use this custom field or track dues in BI at all if they do not wish to. It is optional for all chapters and will only be made to show up in BI for the chapters who request it. Chapters can let the VMN State Office know if they would like this field turned on by emailing Tiffany Brown at tiffany.brown@vt.edu.

Once turned on, this custom field can be found here: Custom Fields, Office Only, VMN Chapter Dues – date dues are paid through. We can only create one field in BI for the purpose of chapter dues recordkeeping. Consequently, we are not able to customize this field for each chapter. Since we needed to create a field that would work for as many chapters as possible, we made it a field that allows for a date to be entered.

In this Fact Sheet, we layout instructions for how to do the following: 1) Bulk update this Custom Field; 2) How to conduct searches to find information in this Custom Field. If you need different/further information and cannot work out how to search for it, please contact Tiffany Brown at tiffany.brown@vt.edu for assistance.

How to Bulk Update a Custom Field

- Login to Better Impact as an admin (you must be an admin to make these updates)
- Go to People
- In the left-hand column, under Custom Fields, click on “Bulk Update User Custom Fields”
- Under Module and Status Filters, click “Accepted” and “People that have ANY of the selected modules and ANY of the selected statuses”. Do not click any other boxes in this section.
- Under Communications Filters, leave all choices as “Don’t Filter”.
- Click “Search”.
- This will give you the complete list of all “Accepted” members of your chapter.
- If you are updating everyone with the same date at the same time, leave the boxes next to everyone’s name checked.
 - If you only need to update specific people, or you need to enter specific dates for certain groups of people, click “Select All” to deselect everyone.
 - Then click the check boxes next to the names of the members whose records you wish to update.
- Under “Update Custom Field for the Selected People”, under Category, choose “Office Only”
- Under “Custom Field”, choose “VMN Chapter Dues – dates dues are paid through”

- Make sure that “Set the value for every selected person” is chosen and enter the date you wish to assign to the selected people.
- Click “Update”
- The system will ask you to confirm this update. Check the box and click “Set the Value”.
- If you need to update a different group of people, go back to the list of names, deselect all of them, select the new names you wish to update, and repeat the steps after that point.

Looking for Information – How to Execute Specific Searches

Initial steps for any search related to dues status

- Go to People.
- Click Search in the left-hand column.
- Under Module and Status Filters, click “Accepted” and “People that have ANY of the selected modules and ANY of the selected statuses. Do not click any other boxes in this section.
- Under Communications Filters, leave all choices as “Don’t Filter”.
- Click “Add Search Criteria”.
- In the Add Search Criteria pop-up window, choose Custom Fields as the Search Type.
- Under Custom Fields, next to Header choose Office Only, next to Custom Field choose “VMN Chapter Dues – date dues are paid through”
- Change the Match Type based on the particular search you want to do, as described below.

Search for: Volunteers who have a date entered in “VMN Chapter Dues – date dues are paid through”

- Change the Match Type to “Is not empty”. This will restrict your list to only those who have paid dues and a date has been entered.
- Click “Add and go”
- You will now see Search Results showing the members of the chapter who have had a date entered into the “VMN Chapter Dues – date dues are paid through”.

Search for: Volunteers who do not have a date entered in “VMN Chapter Dues – date dues are paid through”

- Change the Match Type to “Is empty”. This will restrict your list to only those who have not paid dues and a date has not been entered.
- Click “Add and go”
- You will now see Search Results showing the members of the chapter who have not had a date entered into the “VMN Chapter Dues – date dues are paid through”.

Search for: Volunteers whose dues are about to expire

- Change the Match Type to “is less than or equal to”
- Change the Match Value to the date of interest.
 - For example, if your chapter typically has dues that follow the calendar year, then you might enter 12/31/2022 for the Match Value. This will restrict your list to only those volunteers who have a “VMN Chapter Dues – date dues are paid through” that is on or before 12/31/2022. Note that it will not include anyone who has no date entered at all.
- Click “Add and go”.

For any of the searches described above, you can print the results or create a PDF by clicking the printer icon in the upper-right corner of the Search Results. You can also click on the notebook icon next to each individual listed in the Search Results to view their profile, edit their profile, or send them an individual email.

If you know that you will want to send a bulk email to all volunteers with a certain dues status at the same time, then instead of starting by going to People and then Search, start by going to Communicate and then Send Email. From that point forward, the search directions will be the same, and once you have the search results, you will be able to compose and send an email to everyone listed.

How To Generate A Full Report in Spreadsheet Format

In some cases, you may wish to generate a full report of volunteers' dues statuses that you can download to a spreadsheet to store for historical purposes or to use in another way.

To generate a report of all volunteers and their dues statuses

- Go to Reports.
- Click “Personal Profile Raw Data” in the left column.
- Under Module and Status Filters, click “Accepted” and “People that have ANY of the selected modules and ANY of the selected statuses. Do not click any other boxes in this section.
- Under Communications Filters, leave all choices as “Don’t Filter”.
- Click “Search”.
 - You will now see Search Results showing all of the accepted members of the chapter
- Choose what columns to include in the report. We recommend:
 - Basic columns – First Name, Last Name (which are always automatically selected)
 - Custom fields – VMN Chapter Dues – date dues are paid through
- Click “View Profiles”.
 - This will show you the names and the dates entered (if any) of the people in your chapter who have a date entered for “VMN Chapter Dues – date dues are paid through”.
- To sort while viewing in Better Impact
 - Click on the title of the column you wish to sort by
- To create a spreadsheet
 - Click “Export Profiles”. This will export to an Excel spreadsheet.
 - A “Save as” dialog box will appear. Name the file something meaningful to you and click “Save”
- Once you open the spreadsheet, you can sort in any way you would like.

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