



# Inn Management System Overview



## Introduction

The American Inns of Court understands that Inn administration takes time, effort, and resources, even for the most efficient and well-organized Inns. With this in mind, the [Inn Management System](#) (IMS) was developed as a web-based application to handle all aspects of Inn administration. The system is free to all chartered Inns, is available to key members of the Executive Committee, and is accessible 24/7.

The IMS provides your Inn's leadership team with a system of consistent administrative procedures in a central, secure location. The system can serve as an archive of valuable information for your team and provides consistency in Inn record keeping, regardless of leadership transition.

## Features

The Inn Management System encompasses strategic areas of Inn administration. Below are the highlights of what the IMS can do, and more detailed information is available in the attached pages:

- **Membership:** manage member contact information
- **Committees:** add/edit committees, member roles, and terms
- **Teams:** add/edit team members, team leaders, and meeting assignments
- **Meetings:** manage meeting details, send meeting invitations, and track responses and attendance statistics
- **Finance:** create billing for dues or products, send invoices, and record payments
- **Communication:** send emails, create email templates, and track member communications
- **Documents:** upload and download important Inn documents in a centralized location
- **Reports:** generate and export data about each module, and customize existing reports to fit your Inn's needs

## Demonstrations Available

If your Inn's Executive Committee is interested in taking a closer look at how the Inn Management System can support your Inn, please contact your [Director of Chapter Relations](#) by email or phone for a personal demonstration of the IMS.

## Opt-In only

Because we know that all Inns are not the same, we ask that Inns specify their interest in using the IMS by submitting an enrollment form. To opt-in to using the IMS, download the [Inn Management System Enrollment Form](#), complete the information, and return it to your Director of Chapter Relations. You will receive a user guide, training on how to use the system from your Director of Chapter Relations, and on-going technical support as you need it. Please remember that this system is optional and the Inn can choose to stop using it at any time.

Return your completed [Inn Management System Enrollment Form](#) by email to your [Director of Chapter Relations](#) or mail it to:

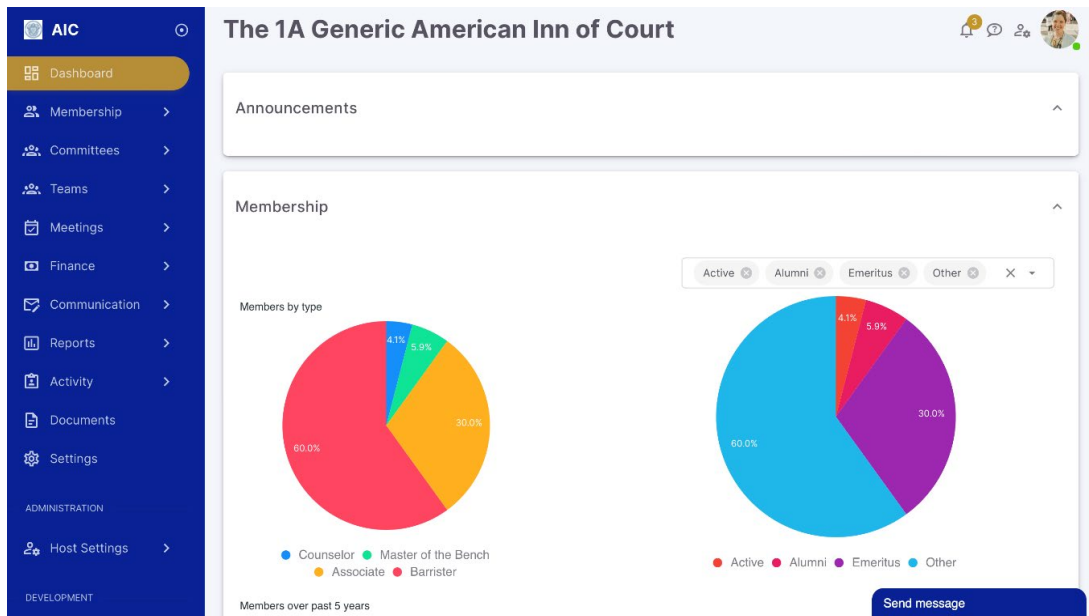
American Inns of Court  
225 Reinekers Lane, Suite 770  
Alexandria, VA 22314

## System Overview

The following System Overview will walk through the modules in the Inn Management System to give a more thorough understanding of its features and capabilities.

### Dashboard

The Dashboard is the landing page for the Inn Management System. This includes announcements and notifications, as well as a variety of graphs on membership, meetings, and invoices.



### Membership

The Membership module allows you to view or edit members' information and add new members. This information is populated by the membership data that the national office has collected from the Inn throughout the Inn's existence. Inns that opt-in to the system are responsible for keeping the membership data updated on an on-going basis.

The 1A Generic American Inn of Court

Members

Select Member Type | Select Member Sub Type | Select Member Status

Search | + ADD NEW MEMBER | EXPORT

FIRST NAME	LAST NAME	MEMBER TYPE	MEMBER SUB TYPE	MEMBER STATUS	ACTIONS
Max	Akridge	Associate	Private Practice	Active	👁
Jenni	Alber	Barrister		Alumnus	👁
John	Alber	Associate		Active	👁
Kenneth	Anderson	Counselor	Judicial	Alumnus	👁
Ernest	Barrens	Master of the Bench	Professor	Active	👁
Libby	Bingham	Master of the Bench		Active	👁
Edward3	Brady	Barrister		Alumnus	👁

## Committees

The Committees module allows you to manage existing committees, create new committees, and manage committee members' terms. The Executive Committee is required for all Inns and other committees can be added as needed. In addition, Pupillage Teams can be created, managed, and assigned to specific meetings through the Membership module.

The screenshot shows the 'Committees' page for '1A Generic American Inn of Court'. The left sidebar contains navigation options: Dashboard, Membership, Committees (expanded), Committee List (selected), Committee Reports, Teams, Meetings, Finance, Communication, Documents, Reports, Activity, and Settings. The main content area features a filter for 'Active' committees, a search bar, and a '+ CREATE COMMITTEE' button. Below is a table listing various committees with their member counts and action icons.

NAME	DESCRIPTION	MEMBER COUNT	ACTIONS
Communications Committee		0	View Edit Mail
Executive Committee		6	View Edit Mail
Membership Committee		2	View Edit Mail
Program Committee		2	View Edit Mail
Social Committee		2	View Edit Mail
Test Committee	2023-2024 Inn year	0	View Edit Mail

## Teams

The Teams module, like the Committees module, includes managing existing pupillage teams and creating new pupillage teams, as well as archiving teams, assigning roles within each team, and assigning teams to meetings.

The screenshot shows the 'Teams' page for 'The 1A Generic American Inn of Court'. The left sidebar contains navigation options: Dashboard, Membership, Committees, Teams (expanded), Team List (selected), Team Reports, Meetings, Finance, and Communication. The main content area features a filter for 'Active' teams, a search bar, and a '+ CREATE TEAM' button. Below is a table listing various teams with their member counts, term begin/end dates, and action icons.

NAME	DESCRIPTION	TERM BEGIN	TERM END	MEMBER COUNT	ACTIONS
A Team 11	Test	07/01/2022	07/31/2022	9	View Edit Mail
A Team 33	sasas	06/24/2022	07/30/2022	1	View Edit Mail
a team 53		05/04/2022	05/31/2022	5	View Edit Mail

## Meetings

The IMS allows the user to set up meetings, invite attendees, and send reminders. All member RSVPs, guests and substitutes, and meal options are tracked in the IMS Meetings module. Using this tool helps reduce email overload since members can RSVP online directly through the IMS instead of sending email replies to an administrator's inbox.

The screenshot shows the 'Meetings' section of the IMS. A sidebar on the left contains navigation options like Dashboard, Membership, Committees, Teams, Meetings, Meeting List, Meeting Reports, Finance, Communication, Documents, Reports, Activity, Settings, ADMINISTRATION, Host Settings, DEVELOPMENT, Process Manager, Playground, and Controls. The main area displays a table of meetings with columns for BEGIN, END, TOPIC, DESCRIPTION, CATEGORY, INVITATIONS SENT, RSVP, and ACTIONS. A '+ CREATE MEETING' button is visible. At the bottom, there is a copyright notice for American Inns of Court and a 'Send message' button.

BEGIN	END	TOPIC	DESCRIPTION	CATEGORY	INVITATIONS SENT	RSVP	ACTIONS
11/01/2021	11/01/2021	November meeting		Committee	2	1	
10/01/2021	10/01/2021	Testing		Committee	3	3	
12/31/2020	12/31/2020	Test meeting	Test meeting	Inn	1	0	
09/01/2020	09/01/2020	Test Virtual Meeting		Inn	2	2	
05/15/2020	05/15/2020	Planning for Inn year		Committee	4	1	
04/01/2020	04/01/2020	Test virtual meeting	Michelle Runge is inviting you to a scheduled Zoom meeting. Topic: Michelle Runge's Personal Meeting Room Join Zoom Meeting https://us04web.zoom.us/j/5327507211 Meeting ID: 532 750 7211	Committee	4	1	
11/21/2019	11/21/2019	test meeting		Committee	1	1	
11/01/2019	11/01/2019	New Member Orientation		Committee	0	0	
11/01/2019	11/01/2019	New Member Orientation		Committee	10	2	
10/01/2019	10/01/2019	Ethics		Committee	0	0	

The screenshot shows the 'Meeting Information' form and two charts. The form includes fields for 'Begin On' (10/01/2023), 'Begin At' (18:00:00.000), 'End On' (10/01/2023), 'End At', 'Topic (Required)' (Testing), 'Description', 'Category (Required)' (Committee), 'Address 1', 'City', 'State', and 'Zip Code'. There are 'MANAGE INVITES' and 'EMAIL INVITES' buttons. The 'Invitation Status' chart is a pie chart with three segments, each labeled 33.3%. The 'Meal Choice' chart is a horizontal bar chart showing 100% for 'Steak' and 0% for 'Chicken'.

In addition, Pupillage Teams can be assigned to specific meetings through the Meetings module.



## Finance

An Inn administrator or treasurer can use this module to create products and dues categories specific to your Inn, invoice members, send invoices and payment reminders, and record payment information.

**The 1A Generic American Inn of Court**

Products

Active

Search

+ CREATE PRODUCT

NAME	DESCRIPTION	DEFAULT PRICE	ACTIONS
Membership Dues 2023-2024	Tiered pricing		View
Associate/ Government/Public Employee- 100			
Associate/ Private Practice- 150			
Pupil- 50			
Associate- 150			
Barrister- 250			
Barrister/ Government/Public Employee- 200			
Barrister/ Private Practice- 250			
Master of the Bench- 350			
Master of the Bench/ Government/Public Employee- 300			

After setting up dues categories, Inn leaders can create invoices and email or print them for distribution to Inn members.

Create Invoice X CANCEL

Product: Select product      Members: Select members      Review: Review selections      Confirmation: Invoice confirmation

Associate   Barrister   Master of the Bench   X

Pupil

Select Member Sub Type

Active

Search

	FIRST NAME	LAST NAME	MEMBER TYPE	MEMBER SUB TYPE	MEMBER STATUS
<input checked="" type="checkbox"/>	Max	Akridge	Associate	Private Practice	Active
<input checked="" type="checkbox"/>	John	Alber	Associate		Active
<input checked="" type="checkbox"/>	Ernest	Barrens	Master of the Bench	Professor	Active
<input checked="" type="checkbox"/>	Libby	Bingham	Master of the Bench		Active
<input checked="" type="checkbox"/>	Grover	Cleveland	Master of the Bench		Active
<input checked="" type="checkbox"/>	Janet	Daniels	Barrister	Private Practice	Active
<input checked="" type="checkbox"/>	Cindy	Dennis	Barrister		Active
<input checked="" type="checkbox"/>	Nicholas	DiCicco	Barrister		Active
<input checked="" type="checkbox"/>	Craig	Dykstra	Barrister	Government/Public Employee	Active
<input checked="" type="checkbox"/>	Robert	Garland	Barrister	Government/Public Employee	Active
<input checked="" type="checkbox"/>	Howard	Hurey	Master of the Bench		Active
<input checked="" type="checkbox"/>	Abraham	Lincoln	Master of the Bench	Government/Public Employee	Active
<input checked="" type="checkbox"/>	John	Marshall	Master of the Bench	Judicial	Active
<input checked="" type="checkbox"/>	Sample	Member	Master of the Bench	Private Practice	Active
<input checked="" type="checkbox"/>	Barack	Obama	Master of the Bench		Active

Send message

## Communications

The interactive email capability is used to email individual members, a group of members (sorted by membership type or status), or multiple groups.

Compose Email

Recipient(s) ✓      Communication ○      Send On ○  
Select Recipient(s)      Define Communication      Choose Send Date

Subject

Attachments The total size of all attachments for a message must be less than 10MB      0 files (0 B in total)

Template

File Edit Insert View Format Table Tools

↶ ↷ 📎 Paragraph **B** *I* ☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷ ☸ ☹ ☺ ☻ ☼ ☽ ☾ ☿ ♀ ♂ ♁ ♃ ♄ ♅ ♆ ♇ ♈ ♉ ♊ ♋ ♌ ♍ ♎ ♏ ♐ ♑ ♒ ♓ ♁ ♃ ♄ ♅ ♆ ♇ ♈ ♉ ♊ ♋ ♌ ♍ ♎ ♏ ♐ ♑ ♒ ♓

Member Placeholder

P POWERED BY TINY

The IMS can also be used to create and send meeting invitations, meeting reminders, dues invoices, and dues reminders through a standardized email screen in the Meetings and Finance modules.

## Documents

The Documents module allows the Executive Committee to share important Inn-related documents with each other. Users can upload new documents, arrange them in folders, and download or delete existing documents.

The screenshot shows the 'Documents' module interface. On the left is a dark blue sidebar with navigation options: AIC, Dashboard, Membership, Committees, Teams, Meetings, Finance, Communication, Reports, Activity, Documents (highlighted), Settings, ADMINISTRATION (Host Settings), and DEVELOPMENT (Process Manager). The main content area is titled 'The 1A Generic American Inn of Court' and 'Documents'. It features a search bar, a toolbar with icons for folder, upload, download, and delete, and a table of 'My Files'. The table has columns for 'Name' and 'ACTIONS'. The files listed are: Another Test Folder, RootFolder1, RootFolder2, RootFolder3, Test, SampleReport (1) (6).pdf, SampleReport (2) (6) - Copy.pdf, and SampleReport (3) (6) - Copy.pdf. At the bottom, it shows 'Rows per page: 20' and '1-8 of 8'.

## Reports

Each module (Membership, Meetings, Committees, Teams, and Finance) contains reports that can be downloaded and printed with the information requested. Reports can be modified as needed and marked as a favorite for easy access. If a specific report is required that is not currently included, a request can be sent by email to your Director of Chapter Relations.

The screenshot shows two sections: 'Favorites' and 'Reports'. Both sections have a 'Select Category' dropdown and a search bar. The 'Favorites' section shows a table with columns 'Name', 'Description', 'Category', and 'ACTIONS', and a message 'No data available'. The 'Reports' section shows a table with columns 'Name', 'Description', 'Category', and 'ACTIONS'. The reports listed are: Committee Roster (Category: Committee), Invoices (Category: Finance), Paid active members (Category: Finance), and Payment Receipt (Category: Finance). Each report has an eye icon and a star icon in the 'ACTIONS' column.

## Sign Up Today

If the IMS is a good fit for your Inn, enroll today to start taking advantage of the benefits. If you have any questions or would like to schedule a demonstration, please contact your [Director of Chapter Relations](#).