



Inn Management System User Guide

April 2023





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1 Introduction

Inn administration takes time, effort, and resources, even for the most efficient and well-organized Inns. To ease some of the strains of volunteer leadership, the American Inns of Court has developed a streamlined system to handle Inn administration quickly and easily.

The Inn Management System (IMS) is a web-based application designed for the Inns of Court to help simplify Inn administration. The system is free to all chartered Inns and is accessible from any web browser. The IMS is designed to streamline Inn membership record maintenance, email members, create committees, track meeting attendance; record pupillage teams, and manage dues.

Use of the IMS requires enrollment; if your Inn is not yet enrolled, please contact your [Director of Chapter Relations](#):

- ☐ **Wes Carr:** wcarr@innsofcourt.org
Serving AL, DC, FL, GA, NJ, NY, RI
- ☐ **Anne Paul:** apaul@innsofcourt.org
Serving AR, IA, IL, IN, LA, MI, MN, MO, MS, ND, NE, SD, TX, WI
- ☐ **Michelle Runge:** mrunge@innsofcourt.org
Serving CT, DE, KY, MA, MD, ME, NC, NH, OH, PA, SC, TN, VA, VT, WV
- ☐ **Caryn Worcester:** cworchester@innsofcourt.org
Serving AK, AZ, CA, CO, HI, ID, KS, MT, NM, NV, OK, OR, UT, WA, WY, Japan

2 Getting Started with the Inn Management System

2.1 Accessing the Inn Management System (IMS)

Once your Inn has signed up to use the Inn Management System, all current members of the Inn's Executive Committee will have access to the IMS. It is important for Inn leadership to develop a policy regarding the use of the IMS based on its unique needs, and the requirement for training prior to its use.

Please note: Your Inn's Executive Committee must be up to date and individuals must have a current email address on file with the national office to log in.

2.2 Logging On

You can log on to the Inn Management System (IMS) in a few easy steps:

1. Go to the American Inns of Court website: www.innsofcourt.org
2. Click the **Sign In** link located at the top of the page.
3. Enter your **Username** and **Password** in the corresponding text boxes then click **Sign In**.
 - ☐ Your username is the email address that is on file with the American Inns of Court. If you do not remember which email is on file, click **Forgot Username**. You will be prompted to enter your email address in the **Email** text box. Click the **Submit** button and you will receive an email with instructions on how to log in.

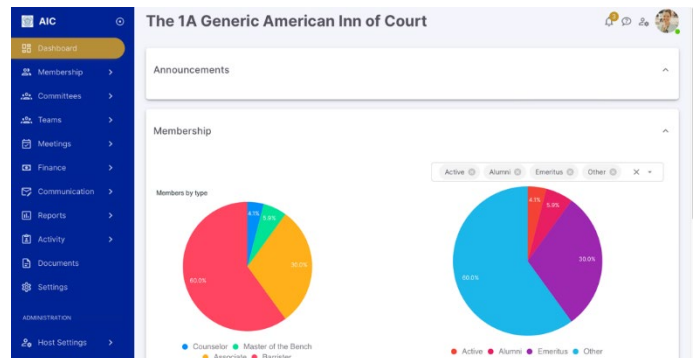
- ☐ If you have forgotten your password, or if this is the first time you have logged in, click **Forgot Password**. You will be prompted to enter your email address in the **Email** text box. Click the **Submit** button and you will receive an email with instructions on resetting your password.
 - ☐ If you are not sure if you are in the system, click **Create a new account** and enter your personal information.
4. Once you are logged in to the site, you will be returned to the homepage. Links for **My Account**, **My Cart** and **Sign Out** will have replaced the **Sign In** link.
 5. Click the **IMS** link at the top of the page.

2.3 IMS Dashboard

Once you have signed in, you will see the Dashboard for your Inn. **Note:** If you are an Inn leader for more than one Inn of Court, click your avatar at the top-right of the page to choose which Inn to manage.

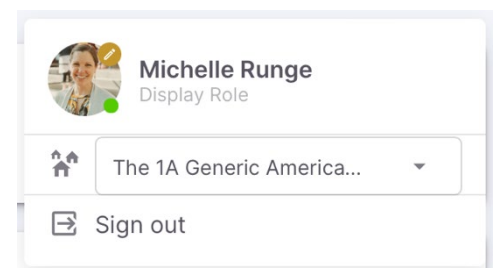
The **Dashboard** acts as the landing page for the IMS and displays useful information, such as:

- ☐ System announcements, which can be dismissed by clicking the upward arrow at the top of the **Announcements** box. Once dismissed, announcements will stay hidden until the browser session has ended.
- ☐ Graphs of members by type (Master of the Bench, Barrister, Associate, Affiliate, Pupil) and status (Active, Alumni, Emeritus, Honorary), as well as a line graph of the number of members over the past five years. The default view is all members, but these can be filtered by choosing applicable member statuses in the drop-down menu near the top of the Membership box.
- ☐ A line graph showing the number of members and guests attending each meeting of the current Inn year.
- ☐ Graphs of invoice statuses, payment types, and paid versus outstanding invoices for the current Inn year.



At the top of the screen, there are three icons:

- ☐ **Notifications:** The bell icon will show a gold badge when there are unread notifications. Click the bell icon to see notifications; click **Dismiss** to erase read notifications; click the **"X"** to hide the notifications pane.
- ☐ **Help:** Click the speech bubble to submit a request for assistance or chat directly with staff (when available).
- ☐ **Theme Customizer:** Click the person icon with the gear to customize the look and feel of your IMS view. Click the **"X"** to dismiss the theme customizer pane.
- ☐ **Avatar:** Click your photo (or the circle with your initials if no photo) to edit your profile photo or sign out of the IMS. If you are on the Executive Committee of multiple Inns, you will see a drop-down menu where you can choose which Inn to manage.



Please note: After 10 minutes of inactivity, the IMS will automatically sign out.

3 Membership

3.1 Viewing Members

1. In the left-hand navigation menu, click the arrow next to **Membership**, then click **Member List**.

The screenshot shows the AIC Member List interface for 'The 1A Generic American Inn of Court'. The sidebar on the left contains navigation options: Dashboard, Membership (selected), Member List (highlighted), Member Reports, Committees, Teams, Meetings, Finance, Communication, Reports, Activity, Documents, and Settings. The main content area displays a table of members with columns: FIRST NAME, LAST NAME, MEMBER TYPE, MEMBER SUB TYPE, MEMBER STATUS, and ACTIONS. The table lists members: 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), and Edward3 Brady (Barrister, Alumnus). Above the table are filters for Member Type, Member Sub Type, and Member Status, a search box, and buttons for '+ ADD NEW MEMBER' and 'EXPORT'.

2. All current and former members are shown. You can use filters to view specific portions of the membership. The following filters can be used separately or in combination:
 - ☐ **Member Type:** Associate, Barrister, Master of the Bench, etc.
 - ☐ **Member Subtype:** Government, Private Practice, Judiciary, etc.
 - ☐ **Status:** Active, Emeritus, Honorary, etc.
3. To apply a filter, click the down arrow in the filter drop-down box and select the desired category from the drop-down list. The member list on the page will automatically update based on the filter(s) selected. Note: You can apply more than one filter at a time.
4. To remove a filter, click “X” next to the filter criterion you wish to remove, or click the “X” in the drop-down box to remove all filters in that category. The member list will automatically update.
5. Search for members by typing full or partial terms in the Search box. To clear the search box, click the “X”.
6. Click the **View** icon under the Actions column to view individual member information.

Please note: The default view for every list page is 10 rows. To see more rows, scroll to the bottom of the list and click the arrow next to **Rows per page**, then choose the desired number of rows.

The screenshot shows a dropdown menu for 'Rows per page' with options: 5, 10 (selected), 15, and All.

3.3 Adding Members

If a new member has joined your Inn and that person does not already have a record associated with your Inn, you will need to create a new member record.

1. From the Member List page, click the **+Add New Member** button.
2. Fill out as much information as possible regarding the member. After each section, click the **Next** button to continue. Note that some fields are marked as required.
3. On the final page, click the **Complete** button.

The 'Add New Member' form is a multi-step process. It starts with a 'Personal' section containing fields for Salutation, First Name (Required), Last Name (Required), Nickname, Title, Phone (Required), Email (Required), and Practice Areas. The 'Picture' section has a profile picture upload. The 'Address' section includes Address Information. The 'Membership' section includes Prefix, Middle Name, Suffix, Designation, Company, and Cell. The 'Assistant' section includes Assistant Information. The 'Bar' section includes Bar Information. A 'NEXT' button is at the bottom right.

3.4 Exporting Members

The IMS includes the option to export member data to an .csv spreadsheet. To export membership information:

1. Under the Membership section of the menu on the left, click **Member List**.
2. On the Member List page, click the **Export** button.
3. Check or uncheck the export options you wish to include on your spreadsheet (ID, Member Type, Member Status, Prefix, First Name, Middle Name, Last Name, Suffix, Designation, Full Name, Company, Address 1, Address 2, Address 3, City, State, Zip, Country, Phone Fax and Email are selected by default). Click and drag your choices into your preferred order if you would like.
4. When you have selected your member export options click the **Save Export** button. The export will automatically download.
5. Save the resulting .csv spreadsheet to a location of your choosing.

The 'Export Member List' dialog box shows a table of export options. The table has three columns: #, Column, and Enabled. The options are: 1. Address 1 (Enabled), 2. Address 2 (Enabled), 3. Address 3 (Enabled), 4. Bar Information (Disabled), and 5. Cell Phone (Enabled). There are 'SAVE EXPORT' and 'CANCEL' buttons at the bottom.

#	Column	Enabled
1	Address 1	Enabled
2	Address 2	Enabled
3	Address 3	Enabled
4	Bar Information	Disabled
5	Cell Phone	Enabled

Please note: If you filtered the membership list prior to exporting, the resulting export will only include members on the filtered list. To include all members, ensure all filter options and the **Search** box are clear. The American Inns of Court data privacy policy prohibits Inns from sharing their membership lists outside of their Inns. For more information, please visit www.innsofcourt.org/AIC/Privacy_Policy.aspx.

4 Committees

4.1 Managing Committees

The default view for each committee is current committee members. To see past or future committee members, click the filter box at the top left of the page.

Note that the default view for every list page is 10 rows. To see more rows, scroll to the bottom of the list and click the arrow next to **Rows per page**, then choose the desired number of rows.

COMMITTEE LIST > COMMITTEE VIEW

Executive Committee Roster

☒ Current
☐ Past
☐ Future

FIRST NAME	LAST NAME	ROLE
Abraham	Lincoln	Treasurer
Michelle	Runge	Administrator

Rows per page: 10 ▾

The IMS includes by default the Executive Committee. The Executive Committee will be populated with the current information on file at the national office. This committee is **required** for all Inns. Any other committees the Inn creates are not pre-populated and are optional for Inns.

To view committees, click the arrow next to **Committees** in the left-hand navigation menu. Then, click **Committee List**. The list defaults to Active committees; click the filter box at the top of the page to include Archived committees. Use the **Search** box to search for a specific committee.

There are several actions you can take on the Committee List page:

- ☐ Click the **View** icon to see the members of a committee. (Alternatively, click the name of the committee.)
- ☐ Click the **Edit** icon to change the name and/or description of a committee.
- ☐ Click the **Email** icon to email all members of a committee.
- ☐ Click the **Three Dots** to archive a committee.

4.2 Adding Committees

- Under the Committees section in the left-hand navigation menu, click the **Committee List**.
- On the Committee List page, click the **+Create Committee** button on the right.
- Enter the name of the committee in the **Name** text box (required) and a description, if desired. Then, click the **OK** button. If you do not need to create a new committee, click **Cancel**.

Create Committee

Name (Required)
Law School Liaison Committee

Builds and maintains relationships with local law schools.

OK CANCEL

4.3 Adding Committee Members

Once a committee is set up, you can add members to the committee.

1. On the Committee List page, search for the committee to which you would like to add members. Click the name of the committee.
2. Click the **+Add Committee Member** button at the top-right of the committee members list.
3. Click the check box next to the name of the member you are adding to the committee. Or type in the search box to find a specific member.
4. Select the committee member's role from the **Role** dropdown box.
5. Enter the committee member's start date in the **Term Begin** text box.
6. Enter the committee member's end date in the **Term End** text box.
7. When you are finished entering the new committee member's information, click the **Complete** button.

4.4 Editing or Removing Committee Members

1. On the Committee List page, click the **View** icon next to the name of the committee from which you would like to remove a member. (Alternatively, click the name of the committee.)
2. Click the **Three Dots** under the Actions column next to the name of the committee member you want to edit. There will be four options:

- ☐ **Add additional role:** If the committee member is filling more than one position on the same committee OR moving into a different position after their current term, choose this option. Define the new role and term dates. Note that the term dates default to the American Inns of Court fiscal year, July 1 to June 30. See [Section 11.1](#) for Committee Settings.

FIRST NAME	LAST NAME	ROLE	TERM BEGIN	TERM END	ACTIONS
Max	Alridge	Committee Administrator	07/01/2022	06/30/23	+ Add additional role
Troy	Dahmert	Committee Administrator	02/01/2022	01/31/23	✎ Extend Term
Cindy	Dennis	Vice Chair	07/01/2022	06/30/23	✎ End Term Early
Cindy	Dennis	President	02/05/2022	05/28/23	✎ Make Corrections

Rows per page: 10

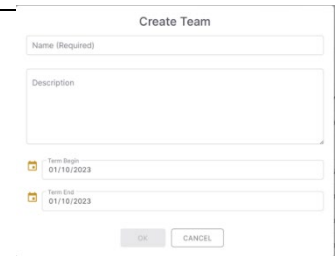
1-4 of 4

- ☐ **Extend term:** If the committee member is continuing in their current role, choose this option and define the new term end date. Note that you will not be able to edit the role or the term begin date.
- ☐ **End term early:** If the committee member is ending their current role early, choose this option and define the new term end date. Note that you will not be able to edit the role or the term begin date.
- ☐ **Make corrections:** If the committee member's role, term begin date, and/or term end date were entered incorrectly, choose this option. This will also give you the option to delete the member from the committee altogether. Note that if you delete a member from a committee, there will be no record of that person having served in that role on the committee and this action cannot be undone.

5 Teams

Pupillage teams plan, research, and present programs for monthly Inn meetings or other Inn activities. The IMS allows Inns to set up any number of pupillage teams and to track and communicate with team membership and leadership.

To view the current list of teams, click the arrow next to **Teams** in the left-hand navigation menu. Then, click **Team List**. The default view is set to active teams only; to view archived teams, click in the filter box and choose the appropriate filter. You can also search for a particular team in the search box.



The 'Create Team' form contains the following fields: 'Name (Required)' (text input), 'Description' (text area), 'Term Begin' (date picker set to 01/10/2023), and 'Term End' (date picker set to 01/10/2023). At the bottom are 'OK' and 'CANCEL' buttons.

From the team list, you can:

- ☐ Click the **View** icon to see the members of a team. (Alternatively, click the name of the team.)
- ☐ Click the **Edit** icon to edit the name, description, and term dates of a team.
- ☐ Click the **Email** icon to email all members of a team.
- ☐ Click the **Three Dots** to archive a team.



The screenshot shows the 'The 1A Generic American Inn of Court' interface. On the left is a navigation menu with 'Teams' selected and 'Team List' highlighted. The main area is titled 'Teams' and features a filter dropdown set to 'Active', a search box, and a '+ CREATE TEAM' button. Below is a table with the following data:

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

5.1 Creating New Teams

1. Click the **Team List** link in the left-hand navigation menu.
2. Click the **+Create Team** button to the top-right of the team list.
3. Enter the team name (required) and description (optional). Define the term dates for the team (i.e., how long the team will be active; it is recommended that the term covers the current Inn year).
4. Click **OK**.

5.2 Adding Team Members

Once you have created your team, you can add team members and designate the team leader(s).

1. Click **Team List** in the left-hand navigation menu, then click the **View** icon (or the team name) for the team to which you wish to add members.
2. To add team members, click the **+Add Team Member** button.
3. Check the box next to the member(s) you wish to add or use the search box to find a specific member. Click **Next**.
4. To assign a leader to the pupillage team, click the **role** drop-down menu next to the name of the person you wish to designate as leader.
5. Click **Complete**.

FIRST NAME	LAST NAME	MEMBER TYPE	MEMBER SUB TYPE	MEMBER STATUS	ROLE
Max	Akridge	ASOC	PER	A	Member

5.3 Editing Team Members

1. Click the **Team List** link in the left-hand navigation menu.
2. Click the **View** icon or the name of the team you wish to edit.
3. To edit an existing team member's role, click the **Edit** icon. Note that the role is required.
4. To email an individual team member, click the **Email** icon.
5. To remove a team member, click the **Three Dots** and click **Remove**. A dialogue box will pop up and ask if you are sure; click **Yes** to remove the member; click **No** to cancel.

5.4 Emailing Teams


Once a team has been created, Inn leaders can email teams with the IMS.

1. Click the **Team List** link in the left-hand navigation menu.
2. To email all members of a team, click the **Email** icon under the Actions column next to the team you wish to email.
3. Compose the email or choose an email template.
4. Click **Send**.

5.5 Archiving Teams

When creating a team, you will be prompted to define term dates. Once a team's **term end date** has passed, the team will automatically be archived. However, after a team has presented their program or at the end of the Inn year, you can archive the team manually. Archiving teams preserves the historical record for the Inn and keeps the Team List manageable.

1. Click the **Team List** link in the left-hand navigation menu.
2. Click the **Three Dots** under the Actions column next to the team you wish to archive.
3. Click **Archive**. A pop-up dialogue box will ask you to confirm; click **Yes** to confirm or **No** to cancel.

NAME	DESCRIPTION	TERM BEGIN	TERM END	MEMBER COUNT ↓	ACTIONS
October 2023 Team	Topic: DEI and the practice of law	07/01/2023	06/30/2024	9	 Archive

4. To view archived teams, click the arrow in the filter box at the top of the Team List page.
5. Check the box next to **Archived**.
6. To view an archived team, click the **View** icon.
7. To restore an archived team, click the **Three Dots** under the Actions column next to the archived team you wish to unarchive. Then, click **Unarchive**.

NAME	DESCRIPTION	TERM BEGIN	TERM END	MEMBER COUNT	ACTIONS
Atticus Team	December 2019 Program			13	View ...
A Test 7				1	View ...
January Team	Presents for the January meeting			1	View ...

6 Meetings

The IMS allows Inns to create meetings, send invitations, and track RSVPs, attendance, and earned CLE credits for its members.

To view the current list of meetings, click the arrow next to **Meetings** in the left-hand navigation menu. Then, click **Meeting List**. The default view is set to active meetings only; to view archived meetings, click in the filter box and choose the appropriate filter. You can also search for a particular meeting in the search box.

From the meeting list, you can:

- ☐ Click the **View** icon to see the details for a meeting. (Alternatively, click the Begin Date of the meeting.)
- ☐ Click the **Edit** icon to edit the details of a meeting.
- ☐ Click the **Calendar** icon to view or create invitations for a meeting.
- ☐ Click the **Email** icon to send invitations or reminders for a meeting.
- ☐ Click the **Three Dots** to archive a meeting.

BEGIN	END	TOPIC	DESCRIPTION	CATEGORY	INVITATIONS SENT	RSVP	ACTIONS
11/01/2021	11/01/2021	November meeting		Committee	2	1	View Edit Calendar Email ...
10/01/2021	10/01/2021	Testing		Committee	3	3	View Edit Calendar Email ...
12/31/2020	12/31/2020	Test meeting	Test meeting	Inn	1	0	View Edit Calendar Email ...
09/01/2020	09/01/2020	Test Virtual Meeting		Inn	2	2	View Edit Calendar Email ...
05/15/2020	05/15/2020	Planning for Inn year		Committee	4	1	View Edit Calendar Email ...
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	View Edit Calendar Email ...
11/21/2019	11/21/2019	test meeting		Committee	1	1	View Edit Calendar Email ...
11/01/2019	11/01/2019	New Member Orientation		Committee	0	0	View Edit Calendar Email ...
11/01/2019	11/01/2019	New Member Orientation		Committee	10	2	View Edit Calendar Email ...
10/01/2019	10/01/2019	Ethics		Committee	0	0	View Edit Calendar Email ...

6.1 Adding New Meetings

1. Click the drop-down arrow next to Meetings in the left-hand navigation menu, then click the Meeting List link.
2. On the Meeting List page click the **Create Meeting** button.
3. Enter the Meeting information. The following fields are required: **Begin Date**, **Topic**, and **Category**. Click the **Next** button at the bottom-right of the page.
4. If you wish to assign a pupillage team to the meeting, click the drop-down **Teams** menu, and choose a team from the list. Click Next. NOTE: Teams must be created before adding them to a meeting. For information on how to create pupillage teams in the IMS, see [Section 5](#).
5. Enter the **RSVP deadline date** for the meeting, and the **RSVP deadline time** and **RSVP instructions** as applicable. Click **Next**.
6. If the Inn offers CLE credit for the meeting, add the number of **CLE hours** and applicable **state**. Click **Next**.
7. If the Inn allows substitutes for members who cannot attend, click the box next to **Allow Subs**. If the Inn allows members to bring guests, click the box next to **Allow Guests**. If members will have a meal choice, enter each choice in a separate **Meal Option** box. Click **Next**.
8. Review the details of your meeting. If you wish to make changes, click **Previous**. To complete creating the meeting, click **Save**.
9. The system will confirm the meeting was created successfully. Click **Close** to return to the Meeting List.

Create Meeting

Meeting Info Team RSVP CLE Options Review Confirmation

Begin On (Required)
03/07/2023

Begin At
05:30

End On

End At
07:00

Topic (Required)
Diversity, Equity, and Inclusion in the Practice of Law

Description

Category (Required)
Inn

Address 1

City

State

Zip Code

Country

NEXT

6.2 Assigning Teams to Meetings

The IMS allows Inns to assign teams to meetings to track team presentation responsibilities.

1. A team must be created in advance to associate it with a meeting. To create teams, please refer to [Section 5](#) of this user guide.
2. On the **Meeting List** page, click the **Edit** icon next to the meeting to which you would like to assign to a team.
3. On the Manage Meeting page, scroll down to the **Team Selection** section. Click the drop-down box and choose the team(s) you wish to assign to the meeting.
4. At the bottom of the page, click **Save Changes**.

6.3 Creating and Sending Invitations

Once you have created your meeting, you can invite members.

1. Click the **Meeting List** link in the left-hand menu.
2. Find the meeting to which you would like to invite members and click the **Calendar** icon.
3. Click the **+Create Invitation** button.
4. Click the **Search** icon next to the Recipients box.
5. Select your filters (you may choose more than one option in each filter, and more than one filter at a time). Click **Search**.
6. To select all members on the filtered list, click the check box next to the Name header. Click the **Select** button at the bottom of the page.
7. To send a copy of the email invitation to any assistants listed on members' records, click the **CC Assistant** box.
8. Enter any additional recipients if needed. To enter more than one additional recipient, hit Enter between each address. Note that additional recipients will receive a copy of the meeting invitation without personal identifying information.
9. Click **Next**.
10. Enter the Subject of the email invitation in the **Subject** text box.
11. To include any attachments (such as program materials), click in the Attachments box, choose your file(s), and click **Upload**.
12. If you have created a saved invitation template, select the template from the list in the **Template** drop-down box. For additional information on Templates, see [Section 8](#).

- Enter the body of your email invitation in the **Body** text area (or make any necessary edits to the template text). To insert information about your meeting or members, you can select fields from the Meeting Placeholders or Member Placeholders drop-down menus. To include an RSVP link in the outgoing invitation, select Meeting URL from the Meeting Placeholders drop-down menu.

IMPORTANT: If you are using the **Meeting url** placeholder in your meeting invitation template, you must delete it in the body of the email and re-insert it from the Meeting Placeholders. If you leave the original Meeting URL placeholder from the template, the link will not work, and members will not be able to register for the meeting.

- Click **Next**.
- If you wish to send the invitation in the future, designate the date and time to send. If you wish to send the invitation as soon as possible, leave those fields blank. Click **Next**.
- Review your email for accuracy. When you are ready, click **Send**.

FIRST NAME	LAST NAME	MEMBER TYPE	COMMENT	RSVP Response	STATUS	ACTIONS
David	Arledge	Barman	American Inn of Court Foundation	Accept	0	ⓘ
Kenneth	Anderson	Counselor	Second District Court	NoResponse	0	ⓘ
Alan	Barrens	Judge		NoResponse	0	ⓘ
Joe	Carroll	Associate		NoResponse	0	ⓘ
Alfred	Finch	Master of the Bench		NoResponse	0	ⓘ
Ulla	Hurst	Master of the Bench	Green Lake Firm	NoResponse	0	ⓘ
Tom	Johnson	Associate		NoResponse	0	ⓘ
Caryn	Worcester	Barman	American Inn of Court Foundation	Accept	0	ⓘ
Leslie	Worcester	Master of the Bench	US Navy	NoResponse	0	ⓘ
Andrew	Young	Barman	American Inn of Court Foundation	NoResponse	0	ⓘ

6.4 Sending Meeting Reminder Emails

Prior to your meeting, you may want to send out an email reminder. Note that you cannot send a reminder email to members until they have been invited to a meeting.

- From the **Meetings List**, click the **Email** icon next to the meeting for which you want to send reminders. Or, from the **Meeting View**, click **Email Invites**.
- Select the appropriate status(es) from the **Invitation Status** drop-down box.
- If you want to send a copy of the invitation to any assistants on members' profiles, click the **CC Assistant** box.
- If you would like someone outside the Inn to receive a copy of the reminder (with personal identifying information removed), type their email address into the **Additional Recipients** box.

5. Click **Next**.
6. Click **CC Admin** to send a copy of the meeting reminder to any assistants listed on members' profiles. Add any additional recipients to the **Additional Recipients** box.
7. Click **Next**.
8. Enter the **Subject** for the reminder email.
9. Click into the **Attachments** box to add any files to the email. Note that the total size of attachments must be less than 10MB.
10. If you have created a saved reminder template, select the template from the **Template** drop-down box. For additional information on templates, see [Section 8](#).
11. Enter the **Body** of your email reminder (or make any necessary edits to the template text). To insert information about your meeting or members, select fields from the **Meeting Placeholder** or **Member Placeholder** drop-down menus.
12. Click **Next**.
13. If you want to schedule your reminder to send in the future, enter a date and time. If no date is entered, the email will be sent out as soon as possible.
14. Click **Next**.
15. Review the reminder. When you are ready to send, click **Send**.

6.5 Tracking Attendance and CLE Credit





After the meeting has occurred, you may want to track who attended the meeting and who earned CLE credit (if applicable).

1. From the Meetings list, click the **Calendar** icon to view invitees. Or, from the Meeting View, click **Manage Invites**.
2. To record CLE, click the check box in the **CLE** column. To record attendance, click the check box in the **Attended** column.

6.6 Archiving Meetings

After a meeting has occurred, the Archive function will remove the meeting from your list of active meetings but maintain a historical record for the Inn. Archived meetings can be restored at any time.

1. Click the Meeting List link in the left-hand menu.
2. Find the meeting you would like to archive and click the **Three Dots**. Click **Archive**.
3. The system will ask you to confirm. Click **Yes** to archive the meeting. Click **No** to return to the Meeting List.
4. To view archived meetings, click the drop-down arrow in the filter box at the top-left of the Meeting List page, then click the box next to **Archived**.

BEGIN	END	TOPIC	DESCRIPTION	CATEGORY	INVITATIONS SENT	RSVP	ACTIONS
03/07/2023	01/01/2001	Diversity, Equity, and Inclusion in the Practice of Law		Inn	0	0	 <div>  Archive </div>
11/01/2021	11/01/2021	November meeting		Committee	2	1	 <div>  Delete </div>

6.7 Restoring a Meeting

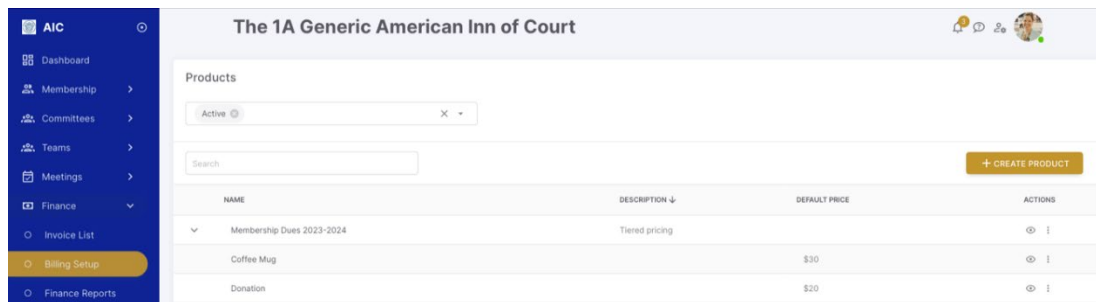
1. From the left-hand navigation menu, click the **Meeting List** link.
2. Click the drop-down arrow in the filter box at the top-left of the Meeting List page, then click the box next to **Archived**.
3. Find the meeting you wish to unarchive (use additional filters and/or the search box, if necessary). Click the **Three Dots** next to the meeting, then click **Restore**.
4. The system will ask you to confirm. Click **Yes** to archive the meeting. Click **No** to return to the Meeting List.
5. The restored meeting will now be visible on the Meeting List page as an **Active** meeting.

7 Finance

The Inn Management System allows an Inn to bill members for dues (and other fees or products), track payments, collect credit card payments online, record other methods of payment, and run financial reports. Note that an Inn can elect to accept credit card payments at any time; it does not have to be done when enrolling to use the IMS.

7.1 Billing Setup

Prior to issuing bills to members, you must set up the Inn's dues structure and other fees.



1. Click the arrow next to the **Finance** link in the left-hand navigation menu, then click **Billing Setup**.
2. Click **+Create Product**.
3. Enter a name (required) and description (optional) for your new product or dues billing. Click **Next**.
4. Choose a pricing model:
 - ☐ **Flat Price:** This option is best for dues, products, or events for which everyone pays the same amount.
 - ☐ **Tiered Pricing:** This option is best for dues, products, or events for which different categories and/or subcategories of membership pay different prices.
5. If you choose **Flat Price**, enter the price in the text box. *Skip to Step 13.*
6. If you choose **Tiered Pricing**, click **Add Price Rule**.

IMPORTANT: If your Inn utilizes Member Subtypes in categorizing its members, you must define both the Member Type and Member Subtype in your Price Rule. If you only choose the Member Type without corresponding Member Subtype, those members will not be billed. It is recommended that, prior to Billing Setup, the membership roster is checked for consistency and accuracy.

7. Choose a **Member Type** from the drop-down menu.
8. If applicable, choose a **Member Subtype** from the drop-down menu. Note that if you choose a subtype, only members that have both the corresponding member type AND subtype will be billed.
9. Type in a number in the **Price** field. Note that you do not need to add a dollar sign or monetary symbol to the price box.
10. Click **Save & Close**.
11. Repeat steps 6-10 for all other member types and member subtype combinations.
12. To remove a Price Rule, click the **Delete** icon next to the price you wish to remove.
13. When you are finished, click **Next**.
14. Review the price(s) and parameters listed. If you need to make changes, click Previous. If everything looks correct, click **Create Product**.
15. The Confirmation page will ask if you want to invoice members now. Click **Create Invoices** to choose members to invoice (see [Section 7.5](#)); click **No, I'm Done** to return to the Billing Setup page.

7.2 Editing Products

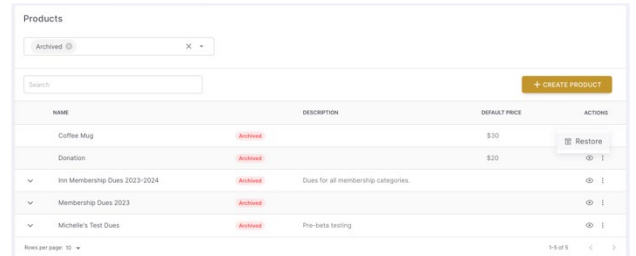
1. Click **Billing Setup** in the left-hand navigation menu.
2. To see all the tiers in a Tiered Pricing product, click the arrow next to the name of the product you wish to view.
3. To view or edit a product, click the **View** icon next to the product you wish to view.
4. In Product View, click the **Edit** button at the bottom of the page to edit the name, description, and/or price(s) of a product.
 - ☐ To remove a price, click the **Delete** button next to the price you wish to remove.
5. When you are finished making changes, click **Save Changes**.
6. Make any changes necessary and click the green **Save** button.

MEMBER TYPE	MEMBER SUBTYPE	PRICE	ACTIONS
Associate	Government/Public Employee	\$ 100	[Delete]
Associate	Private Practice	\$ 150	[Delete]
Public		\$ 50	[Delete]
Associate		\$ 150	[Delete]
Barrister		\$ 250	[Delete]
Barrister	Government/Public Employee	\$ 200	[Delete]
Barrister	Private Practice	\$ 250	[Delete]
Master of the Bench		\$ 350	[Delete]
Master of the Bench	Government/Public Employee	\$ 300	[Delete]
Master of the Bench	Private Practice	\$ 350	[Delete]

7.3 Archiving Products

Archiving products your Inn no longer needs for billing purposes keeps the Product List organized. Archived products can be retrieved via the filter option at the top of the Product List page.

1. Click **Billing Setup** in the left-hand navigation menu.
2. Click the **Three Dots** next to the name of the product you wish to archive.
3. Click **Archive**.
4. To view archived products, click in the filter box at the top of the Product List page and check the box next to Archived. Archived products will be noted with a red archived symbol next to the description.
5. To view an archived product, click the **View** icon next to the product you wish to view.
6. To restore an archived product, click the **Three Dots** next to the product you wish to unarchive, then click **Restore**.

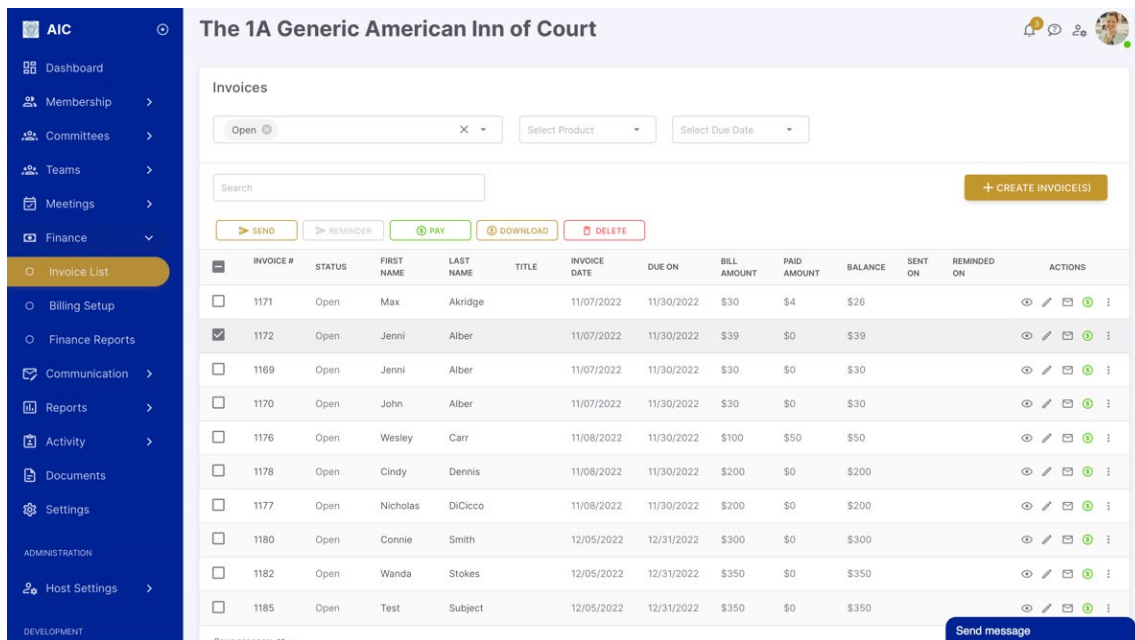


The screenshot shows the 'Products' page with a filter dropdown set to 'Archived'. The table lists several products, all marked as 'Archived' in red. The products include 'Coffee Mug', 'Donation', 'Inv Membership Dues 2023-2024', 'Membership Dues 2023', and 'Michelle's Test Dues'. Each product has a 'Restore' button in the actions column.

NAME	DESCRIPTION	DEFAULT PRICE	ACTIONS
Coffee Mug	Archived	\$30	Restore
Donation	Archived	\$20	Restore
Inv Membership Dues 2023-2024	Archived Dues for all membership categories		View
Membership Dues 2023	Archived		View
Michelle's Test Dues	Archived Pre-beta testing		View

7.4 Managing Invoices

Once your dues categories are set up, you can create invoices for your members. This can be initiated from the confirmation page of the Billing Setup process (see [Section 7.1](#)), or from the **Invoice List**.



The screenshot shows the 'The 1A Generic American Inn of Court' interface. The left-hand navigation menu has 'Invoice List' selected. The main area displays a table of invoices. The table has columns for Invoice #, Status, First Name, Last Name, Title, Invoice Date, Due On, Bill Amount, Paid Amount, Balance, Sent On, Reminded On, and Actions. The first two invoices are highlighted: Invoice 1171 (Max Akridge) and Invoice 1172 (Jenni Alber). Below the table, there is a 'Send message' button.

INVOICE #	STATUS	FIRST NAME	LAST NAME	TITLE	INVOICE DATE	DUE ON	BILL AMOUNT	PAID AMOUNT	BALANCE	SENT ON	REMINDED ON	ACTIONS
1171	Open	Max	Akridge		11/07/2022	11/30/2022	\$30	\$4	\$26			View Edit Send Message
1172	Open	Jenni	Alber		11/07/2022	11/30/2022	\$39	\$0	\$39			View Edit Send Message
1169	Open	Jenni	Alber		11/07/2022	11/30/2022	\$30	\$0	\$30			View Edit Send Message
1170	Open	John	Alber		11/07/2022	11/30/2022	\$30	\$0	\$30			View Edit Send Message
1176	Open	Wesley	Carr		11/08/2022	11/30/2022	\$100	\$50	\$50			View Edit Send Message
1178	Open	Cindy	Dennis		11/08/2022	11/30/2022	\$200	\$0	\$200			View Edit Send Message
1177	Open	Nicholas	DiCicco		11/08/2022	11/30/2022	\$200	\$0	\$200			View Edit Send Message
1180	Open	Connie	Smith		12/05/2022	12/31/2022	\$300	\$0	\$300			View Edit Send Message
1182	Open	Wanda	Stokes		12/05/2022	12/31/2022	\$350	\$0	\$350			View Edit Send Message
1185	Open	Test	Subject		12/05/2022	12/31/2022	\$350	\$0	\$350			View Edit Send Message

1. Click **Invoice List** on the left-hand navigation menu.
2. The Invoice List is filtered to open invoices by default. This includes unpaid and partially paid invoices. On the Invoice List page, you can:
 - ☐ **Filter** for closed invoices by clicking in the filter box at the top of the page, then clicking the box next to Closed. You can also filter for invoices by product and/or due date. Multiple filters can be set at the same time.

- ☐ **Search** for an invoice by typing in the search box. You can search by member name price, or paid amount.
- ☐ **View** a person's invoice by clicking the **View** icon next to the member's name, under the Actions column.
- ☐ **Edit** a person's invoice by clicking the **Edit** icon next to the member's name, under the Actions column.
- ☐ **Send** an existing invoice(s) by clicking the box next to the name of the person(s) to which you wish to send an invoice, then click the **Send** button above the Invoice List. Or click the **Email** icon under the Actions column next to the name of the person to whom you wish to send the invoice. (See [Section 7.6.](#))
- ☐ Send a **reminder** to a member(s) who has already been sent their invoice by clicking the box next to the name of the person(s) to which you wish to send an invoice, then click the **Reminder** button above the Invoice List. Or click the **View** icon under the Actions column next to the name of the person you wish to remind, then click **Reminder**. (See [Section 7.7.](#))
- ☐ **Pay** an existing invoice(s) by clicking the box next to the name of the person(s) to which you wish to send an invoice, then click the **Pay** button above the Invoice List. Or click the **Pay** icon under the Actions column next to the name of the person for whom you wish to record payment. (See [Section 7.8.](#))
- ☐ **Download** existing invoice(s) by clicking the box next to the name of the person(s) to which you wish to send an invoice, then click the **Download** button above the Invoice List. Or click the **Three Dots** under the Actions column and click **Download**. Open your downloads folder on your computer to view the invoice.
- ☐ **Delete** an existing, unpaid invoice(s) by clicking the box next to the name of the person(s) to which you wish to send an invoice, then click the **Delete** button above the Invoice List. Or click the **View** icon under the Actions column next to the person's name for whom you wish to delete an invoice, then click the **Delete** button.

IMPORTANT: To perform the same action for multiple invoices on the Invoice List, the invoices must have that action in common. For instance, if you select an invoice with a partial balance and an invoice without any payment recorded, you will not be able to delete the invoices because one of those invoices has been partially paid. As another example, if you select an invoice that has not been sent and an invoice that has been sent, the Send and the Reminder functions will not be available.

7.5 Creating Invoices

1. Click the **Invoice List** link in the left-hand navigation menu.
2. Click the **+Create Invoice(s)** button, to the right above the Invoice List.
3. Click the arrow in the **Select Product** drop-down menu and choose the name of the product for which you want to invoice members.
4. Enter the invoice date of the invoices in the **Invoice Date** text box.
5. Enter the due date of the invoices in the **Due Date** text box.
6. Click the **Next** button.

- Find the members you wish to invoice using the **Member Type**, **Member Subtype**, and/or **Member Status** filters. If you are only invoicing a few members, you can type their names in the **Search** box to find them.

First Name	Last Name	Member Type	Member Sub Type	Member Status
<input checked="" type="checkbox"/>	Max	Akridge	Associate	Active
<input checked="" type="checkbox"/>	John	Alber	Associate	Active
<input checked="" type="checkbox"/>	Ernest	Barrens	Master of the Bench	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	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
<input checked="" type="checkbox"/>	Robert	Garland	Barrister	Government/Public Employee
<input checked="" type="checkbox"/>	Howard	Honey	Master of the Bench	Active
<input checked="" type="checkbox"/>	Abraham	Lincoln	Master of the Bench	Government/Public Employee
<input checked="" type="checkbox"/>	John	Marshall	Master of the Bench	Judicial
<input checked="" type="checkbox"/>	Samuel	Member	Master of the Bench	Private Practice
<input checked="" type="checkbox"/>	Barack	Obama	Master of the Bench	Active

- Click the box next to the members' names you wish to invoice. To select all members in a list, click the check box at the top of the list.
- Once you have selected the members to invoice, click the **Next** button.
- Review the invoice details. If any information is incorrect, click the **Previous** button to return to the previous screen. If the invoices are correct, click the **Create Invoice(s)** button.

Member Name	Price	Invoice Date	Due Date
Max Akridge	\$ 150	08/01/2023	10/31/2023
John Alber	\$ 150	08/01/2023	10/31/2023
Ernest Barrens	No pricing defined.	08/01/2023	10/31/2023
Libby Bingham	\$ 350	08/01/2023	10/31/2023

IMPORTANT: If you invoiced members of a category and/or subtype that were not defined in the Billing Setup for this product, you will see the message **No pricing defined** next to the members' names. Either click **Cancel** at the top of the page and return to the Billing Setup page to edit the product's pricing rules or click **Previous** and unselect those members.

- Once you have created the invoices, you will have the option to send the invoices to members. To send invoices, click the **Send Invoice(s)** button. To send invoices later, click **No, I'm Done**.

7.6 Sending Invoices

Creating an invoice does not automatically send invoices to members.

- If you created invoices following the directions in [Section 7.5](#), go to the **Invoice List**.
- Use the search box and/or filters to find the members to whom you wish to send invoices. Select members by clicking the checkbox next to their name. To select all, click the checkbox next to the Invoice header.
- Click the **Send** button above the Invoice List. Note that all members selected must have the same invoice status (i.e., **unsent**) to send invoices in a batch.
- Type a **subject** for your email and attach any documents as necessary. If you are using a **template**, choose it from the drop-down menu; alternatively, type your message into the body of the email.
The following placeholders on the Invoice Placeholders drop-down menu will help compose the invoice:

- ☐ **Invoice Number:** Number generated by the Inn Management System (e.g., 27637).
- ☐ **Dues Name:** The name of the dues category will show up here (e.g., “Barrister”).
- ☐ **Bill Amount:** The amount due from the member (e.g., \$400).
- ☐ **Due Date:** The date the invoice is due (e.g., 9/30/2023).

TIP: Members can only pay invoices online if the Inn has set up an account with PayPal and entered the account information under Settings. See [Section 11.2](#) for more information.

5. Include any instructions for paying dues in the body of your email.
6. Click **Next**.
7. Review your email. When you are satisfied, click **Send**.

7.7 Sending Invoice Reminders

1. From the left-hand navigation menu, click **Invoice List** in the Finance section.
2. Use the search box and/or filters to find the members to whom you wish to send invoices. Select members by clicking the check the box next to their name. To select all, click the check box next to the Invoice header.
3. Once you have finished selecting members to remind, click the **Reminder** button above the Invoice List. Note that all members selected must have the same invoice status (i.e., sent) to send reminders in a batch.
4. Type a **subject** for your email and attach any documents as necessary. If you are using a **template**, choose it from the drop-down menu; alternatively, type your message into the body of the email. The following placeholders in the **Invoice Placeholders** drop-down menu will help compose the invoice:
 - ☐ **Invoice Number:** Number generated by the Inn Management System (e.g., 27637).
 - ☐ **Dues Name:** The name of the dues category will show up here (e.g., “Barrister”).
 - ☐ **Bill Amount:** The amount due from the member (e.g., \$400).
 - ☐ **Due Date:** The date the invoice is due (e.g., 9/30/2023).
5. Include any instructions for paying dues in the body of your email.
6. Click **Next**.
7. Review your email. When you are satisfied, click **Send**.

7.8 Processing Payments

1. Click **Invoice List** in the left-hand navigation menu.
2. Select the member for whom you wish to record payment by clicking the box next to their name. You may select more than one invoice for the same person.
3. Click the green **Pay** button above the Invoice List.
4. On the Pay Invoices page, type in the payment amount in the text box for each item on the invoice, as applicable. The Payment Total beneath the text boxes will automatically update.
5. Check that the **Recipient Email** is correct and change it in the text box as necessary.

6. Choose the **Paid On** date. Today's date will be selected by default.
7. Click the arrow in the **Payment Type** drop-down box. The following payment options are available as default; see [Section 11.2](#) for information about opting-in to other payment methods.
 - ☐ **Cash:** Choose this option if the member is paying with cash.
 - ☐ **Check:** Choose this option if the member is paying by check. Enter the **check number**, the **date paid**, and the **payee's name**. All fields are required.
8. When the payment information is complete, click the **Pay** button. The member will receive an email confirmation of the processed payment.

7.9 Payment History

1. Click the **Invoice List** link in the left-hand navigation menu.
2. Click the **View** icon or the name of the member you wish to view. Use the search box and/or filters to find a member as needed.
3. Scroll down to see the person's **Invoice History**, which will show when the invoice was created, updated, and sent; and by whom.

The screenshot displays the 'INVOICE VIEW' interface. At the top, it shows 'Invoice #1171' with details: 'Invoice #1171', 'Invoice On: 10/01/2022', 'Due On: 10/30/2022', 'Max Avillage', 'max.avillage@inn.com', '3001 15th May Rd', 'San Francisco, CA', and 'United States'. There are buttons for 'SEND', 'PRINT', 'DOWNLOAD', and 'ADD ITEM'. Below this is a table with columns: 'Item', 'Bill Amount', 'Paid Amount', 'Balance', and 'ACTIONS'. The table contains one row for 'Coffin Mug' with a bill amount of \$10.00, a paid amount of \$0.00, and a balance of \$10.00. A 'Total' row shows a bill amount of \$10.00, a paid amount of \$0.00, and a balance of \$10.00. At the bottom, there is an 'Invoice History' section with a list of events: 'Revised invoice' (01/10/2023 2:10:12 pm), 'Updated invoice' (01/10/2023 2:10:12 pm), 'Updated invoice' (01/10/2023 2:10:12 pm), 'Emailled invoice' (01/08/2023 2:10:12 pm), 'Updated invoice' (01/08/2023 2:10:12 pm), and 'Created invoice' (01/07/2023 2:10:12 pm).

8 Communication

8.1 Email Templates

Users can create and save email templates for future, recurring emails. This can provide consistency in communications and save time for Inn administrators. There are two types of templates: Inn templates and AIC templates.

- ☐ **Inn Templates:** These are templates that users can create for all Executive Committee members to access.
- ☐ **AIC Templates:** These are system-created sample templates for emails that Inns commonly send. While the Inn does not need to use system templates in its communications, using ready-made templates can save the Inn time in creating its own. To edit an AIC template, copy it to the Inn Templates section.

To access the templates, click the arrow next to the **Communications** module in the left-hand navigation menu. Then, click **Email Templates**. There are several options on the templates page:

- ☐ **Filter** by template category by clicking on the filter box at the top of the page.
- ☐ **Search** for a template by typing in the search bar above the templates box.
- ☐ **View** a template by clicking on the name of the template you wish to view, or by clicking the **View** icon under the Actions column.
- ☐ **Create** a new template by clicking the **Create Template** button on the right (see [Section 8.2](#)).
- ☐ **Edit** a template by clicking the **Edit** icon under the Actions column next to the template you wish to edit (see [Section 8.4](#)).

- ❑ **Send** an email using a template by clicking the **Email** icon under the Actions column next to the template you wish to use (see [Section 8.5](#)).
- ❑ **Copy** a template by clicking the **Three Dots** under the Actions column next to the template you wish to copy, then click **Copy** (see [Section 8.6](#)).
- ❑ **Delete** a template by clicking the **Three Dots** under the Actions column next to the template you wish to delete, then click **Delete** (see [Section 8.7](#)). Click **Yes** to delete the template or click **No** to cancel.

8.2 Creating Email Templates

1. Click arrow next to the **Communications** module in the left-hand menu. Then, click **Email Templates**.
2. Click the **Create Template** button on the right.
3. Enter a **name** for the template. Choose a **category** for the template from the drop-down menu.
4. In the text edit area, create the body of the template. You can add images, links, and **placeholders** (see [Section 8.3](#)) to the template. Including appropriate contact information at the end of a template may help Inn members know who to reach out to with any questions.
5. When you are finished, click **Save Changes**.

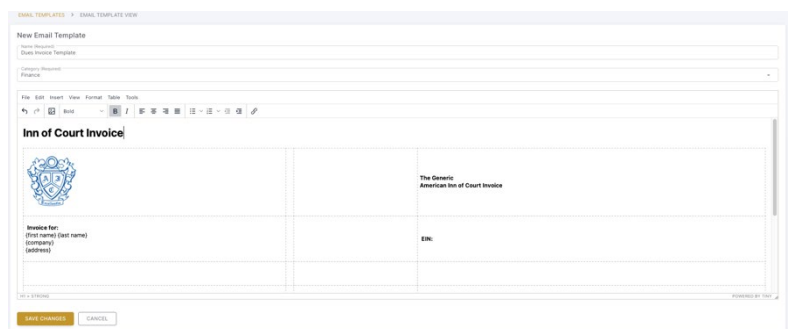


8.3 Template Placeholders

1. The **Member Placeholders** drop-down menu includes merge fields for User ID (for the member), Member ID, First Name, Last Name, Company, and Address.
2. The **Meeting Placeholders** drop-down menu includes merge fields for Meeting Start Date (for a single meeting), Meeting Start Time, Meeting Location, Meeting Description, Meeting URL, Meeting RSVP instructions, Meeting RSVP deadline, Meeting Topic, and Meeting Team.
3. The **Invoice Placeholders** drop-down menu includes merge fields for Invoice Number, Dues Name, Bill Amount, and Due Date.

8.4 Editing Email Templates

1. In the **Communications** section in the left-hand navigation menu, click **Email Templates**.
2. Find the email template you would like to edit and click the **Edit** icon in the Actions column next to the template you wish to edit.
3. Make any changes needed to the email template in the **name** text box, the **category** drop-down menu, or the **content** text area.
4. When you are finished making changes to your email template, click the **Save Changes** button.



8.5 Sending Email Templates

You can send an email using a membership category template directly from the Email Templates screen. For more information about how to send emails through the IMS, see [Section 8.9](#).

1. In the **Communications** section in the left-hand navigation menu, click **Email Templates**.
2. Find the email template you would like to use in your email and click the **Email** icon in the Actions column next to the template you wish to use.
3. Choose the recipients for the email. Click **Next**.
4. Edit the template in the body of the email and/or add attachments as needed. Click **Next**.
5. If you wish to schedule the email to send at a future date and time, choose the date and time. If you wish to send the email as soon as possible, leave those fields blank. Click **Next**.
6. Review your email. Click **Previous** if you wish to make changes. Click **Send** if you are ready to send it.

8.6 Copying Email Templates

1. In the **Communications** section in the left-hand navigation menu, click **Email Templates**.
2. Find the email template you would like to edit and click the **Three Dots** in the Actions column next to the template you wish to edit.
3. Click **Copy**.
4. In the pop-up dialog box, enter a name for the copied template. Then click **Save & Close**.

8.7 Deleting Email Templates

1. In the **Communications** section in the left-hand navigation menu, click **Email Templates**.
2. Find the email template you would like to edit and click the **Three Dots** in the Actions column next to the template you wish to edit.
3. Click **Delete**.
4. A pop-up Delete Template dialog box will ask if you are sure you would like to delete the template. If you are sure, click **Yes**. If you are unsure, click **No**.

8.8 Emailing Members

The IMS allows Inn leaders to send emails immediately or scheduled for a future date to their members.

Note that emails from the IMS will be sent from the email address “no-reply@innsofcourt.org”. The Inn will need to include a person’s contact information at the bottom of the email for Inn members to know who to contact, since they will not be able to reply directly to the email.

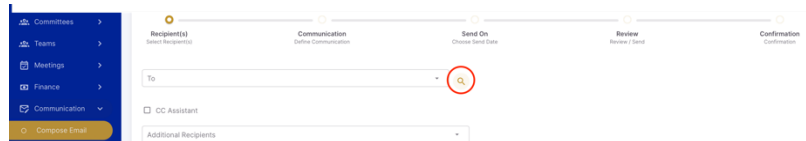
8.9 Creating an Email

1. In the **Communication** section in the left-hand navigation menu, click **Compose Email**.
2. Choose the recipients for the email. Click into the **Recipients** box to choose from a list of members or click the **search icon** to filter the member list. (The Search function is best when sending an email to a large group. See [Section 8.10](#).)
3. To send a copy of the email to assistants listed on members’ profiles, check the **CC Assistant** box.

4. If you wish to send a copy of the email to anyone outside the Inn, type the email in the **Additional Recipients** box. If you are adding multiple additional recipients, hit **Tab** after each email address to separate them.
5. To remove the email address of an intended recipient, click the “X” next to the name of that recipient.
6. Click **Next**.
7. Enter a subject for your email in the **Subject** text box.
8. To add any attachments, click in the **Attachments** box and choose a file(s) to upload. Note that the total attachment size cannot exceed 10MB.
9. If you are using a template, click the **Template** drop-down arrow and choose a template from the Inn Templates list. Note that if you plan to use a template, choose the template first and then make edits to the email, since inserting a template will erase anything you have already typed in the body of the email.
10. Type the body of your email or make edits to your template in the large text box.
11. Click **Next**.
12. If you wish to schedule the email to send at a future date and time, choose the date (mm/dd/yyyy) and time (hh:mm pp). If you wish to send the email as soon as possible, leave those fields blank. Click **Next**.
13. Review your email. Click **Previous** if you wish to make changes. Click **Send** if you are ready to send it. You will receive a confirmation email once the email has been sent.

8.10 Selecting Email Recipients

1. To select individual recipients, click on the **Recipients** drop-down box. A drop-down list of the full Inn membership sorted by first name will appear; click on individual Inn member’s name to select them and add them to the recipient list.
OR
2. To select multiple recipients, click the **Search** icon next to the **Recipients** box.
3. You can email groups of Inn members after filtering by First Name, Last Name, Company, Member Type, Member Status, Practice Area, and/or State.
4. To email all active members, click the **Member Status** drop-down box. Select **Active** from the drop-down list.
5. Click **Search**.
6. To select all members, click the **Check** box next to **Name** in the column header. NOTE: If you wish to only select specific individuals, click the check box in the column beside their name.
7. At the bottom of the screen, click the **Select** button.
8. The recipients you designated will appear in the **Recipients** box.



9 Reports

There is an array of reports available in each section of the IMS. There is also a Reports section in which all reports are available. This is an evolving and ever-changing list, so instructions specific to a particular report are not included here. If you have any questions about a specific report, please call 1-800-233-3590 or send an email to your [Director of Chapter Relations](#) (see [Section 12](#)).

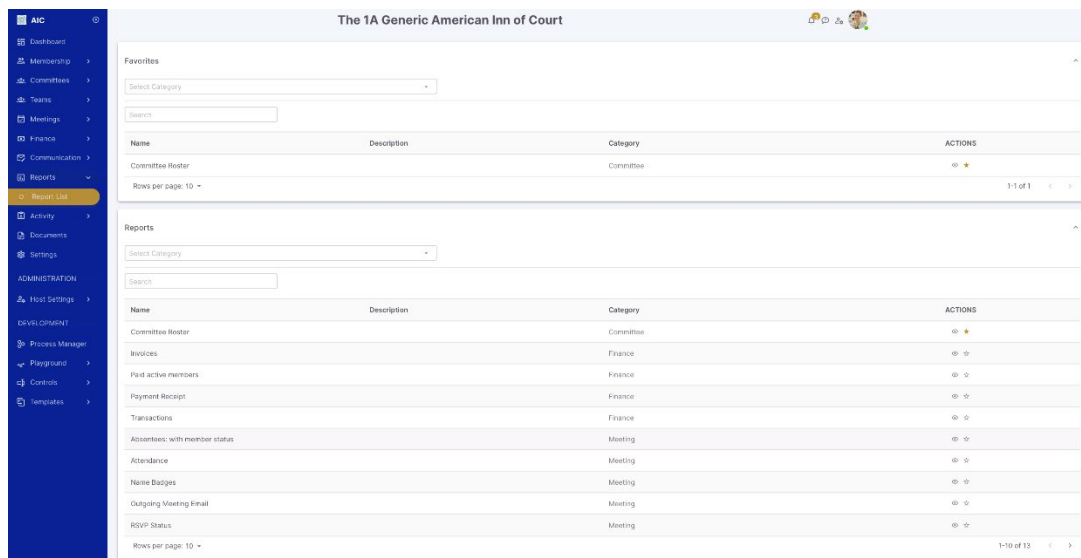
9.1 Running Reports

In each section of the IMS, there are links for reports applicable to that section (i.e., Membership Reports, Committee Reports, Team Reports, Meeting Reports, and Finance Reports). In the Reports section there are links for all Reports.

- ☐ To find a report, navigate to the section for which you want to run a report, click the arrow next to the name of the section, and click the reports link. Or click the arrow next to **Reports**, then click **Report List**.
- ☐ To find a specific report, use the category filter or search box.
- ☐ To run a report, click the **View** icon under the Actions column next to the report you wish to run. Enter the parameters for that report, then click **Print Report**. The report will appear in a new tab or window.
- ☐ To download a report, run the report per the instructions above, then click the download icon in your browser.
- ☐ To favorite a report for easy access, click the **Star** icon under the Actions column next to the report you wish to favorite. The report will appear at the top of the screen, under the Favorites list.

9.2 Customizing Reports

Within an existing report, you can define the parameters to generate a report for your Inn's needs. If you need a specific report that is not currently available, please contact the [Director of Chapter Relations](#) for your region to request the report you need. Please be as specific as possible about the information you want contained in the report and how you would like the report formatted. Please allow up to 10 days for the report to be available in the Inn Management System.



10 Documents

The Documents section of the IMS serves as a repository for Inn documents and to preserve institutional knowledge for incoming leaders. Inn leaders can upload, download, organize, and delete documents from this section as needed; documents stored here will be accessible by all the Inn's leaders.

- ☐ Access the **Documents** section from the left-hand navigation menu.
- ☐ To add a new folder, click the **Folder** icon.
- ☐ To open a folder, double-click the name of the folder you wish to open.
- ☐ To upload a new document, the **Upload** icon, which looks like a piece of paper with an up arrow.
- ☐ To download an existing folder or document, click the box next to the name of the folder or document you wish to download. Then click the **Download** icon, which looks like a piece of paper with a down arrow. Or click the **Three Dots** under the Actions column and click **Download**.
- ☐ To delete an existing document, click the box next to the name of the document you wish to delete, then click the **Delete** icon. Or click the **Three Dots** under the Actions column and click **Delete**.
- ☐ To find a document, type in the **search box**.

The screenshot displays the 'Documents' section of the AIC (American Inn of Court) interface. The left-hand navigation menu is visible, with 'Documents' selected. The main content area shows a list of files and folders under the heading 'My Files'. The list includes folders like 'Another Test Folder', 'RootFolder1', 'RootFolder2', 'RootFolder3', and 'Test', as well as PDF files like 'SampleReport (1) (6).pdf', 'SampleReport (2) (6) - Copy.pdf', and 'SampleReport (3) (6) - Copy.pdf'. Each item has a checkbox and an 'ACTIONS' column with three dots. A search bar is at the top, and a 'Rows per page: 20' dropdown is at the bottom left of the table.

<input type="checkbox"/>	Name	ACTIONS
<input type="checkbox"/>	Another Test Folder	⋮
<input type="checkbox"/>	RootFolder1	⋮
<input type="checkbox"/>	RootFolder2	⋮
<input type="checkbox"/>	RootFolder3	⋮
<input type="checkbox"/>	Test	⋮
<input type="checkbox"/>	SampleReport (1) (6).pdf	⋮
<input type="checkbox"/>	SampleReport (2) (6) - Copy.pdf	⋮
<input type="checkbox"/>	SampleReport (3) (6) - Copy.pdf	⋮

11 Settings

11.1 Committees

The Committees section of the Settings module allows users to set the default start month, end month, and term length for committee appointments.



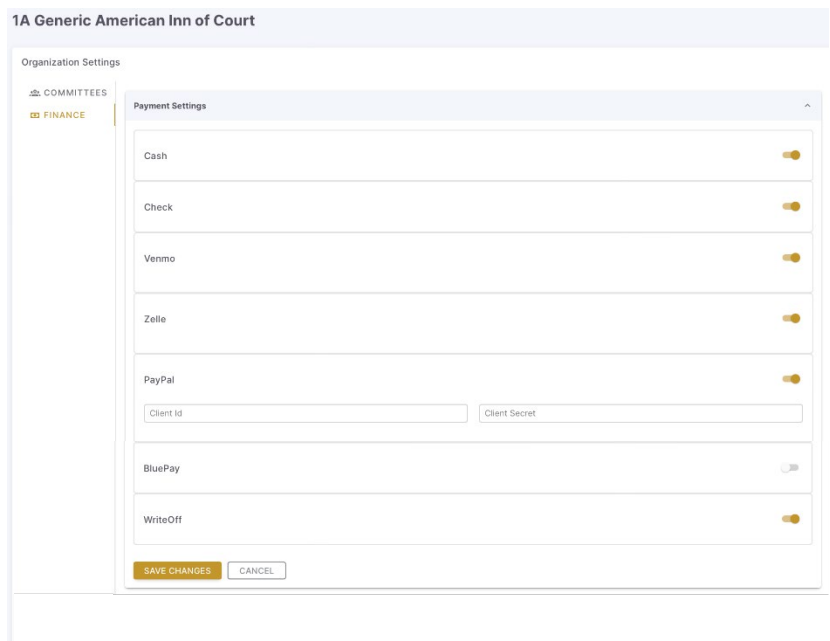
The screenshot shows the 'The 1A Generic American Inn of Court' interface. On the left is a blue sidebar with a menu: AIC, Dashboard, Membership, Committees, Teams, Meetings, Finance, Communication, Reports, Activity, Documents, and Settings (highlighted). The main content area is titled 'System Settings' and has a sub-header 'COMMITTEES'. Under 'COMMITTEES', there is a 'Default Term Month' section with three dropdown menus: 'Term Start Month' (set to October), 'Term End Month' (set to November), and 'Term Length (Years)' (set to 2). An 'Edit' button is at the bottom of this section.

11.2 Finance

The Finance section of the Settings module allows users to choose which payment methods the Inn will accept. Click the toggle icon next to the name of a payment option the Inn accepts to include it as an option on the payment screen. Click the **Edit** button at the bottom of the screen to edit any information under the payment options.

Choices include:

- ☐ **WriteOff**: This allows users to adjust an invoice amount without deleting an existing invoice.
- ☐ **Cash** (default option)
- ☐ **Check** (default option)
- ☐ **Venmo***
- ☐ **Zelle***
- ☐ **PayPal***: Members can pay invoices through the IMS if the Inn uses this service.
- ☐ **BluePay**: Members can opt to use the American Inns of Court's merchant accounts to process credit card payments.



The screenshot shows the '1A Generic American Inn of Court' interface. On the left is a blue sidebar with a menu: AIC, Dashboard, Membership, Committees, Teams, Meetings, Finance, Communication, Reports, Activity, Documents, and Settings (highlighted). The main content area is titled 'Organization Settings' and has a sub-header 'FINANCE'. Under 'FINANCE', there is a 'Payment Settings' section. It contains a list of payment methods with toggle switches: Cash, Check, Venmo, Zelle, PayPal, BluePay, and WriteOff. The PayPal section has two input fields: 'Client Id' and 'Client Secret'. At the bottom of the section are 'SAVE CHANGES' and 'CANCEL' buttons.

** The Inn must create its own account with these service providers to accept payment. Currently, the Inn can only accept credit card payments through the IMS via BluePay or PayPal. The American Inns of Court does not endorse any service provider.*

12 Questions

If you have questions or need additional training, please contact your [Director of Chapter Relations](#) at (703) 684-3590 or 1-800-233-3590. If you are experiencing technical difficulties or receive any error messages, please notify us at support@innsofcourt.org.

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