

## MAFSI Member Compass Overview

The MAFSI Member Compass is your member online profile to view, access, and manage your membership information and benefits.

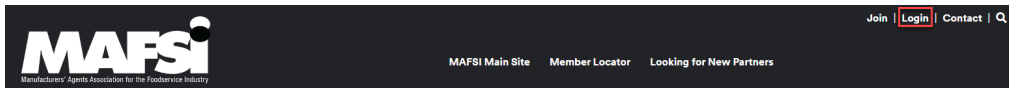
### The member compass allows you to:

- edit your personal contact information.
- update company member information.
- manage the individual profiles of your company's staff.
- view your account history & pay invoices.
- access members only resources and benefits.

## Access the Member Compass?

You can visit your Member Compass by clicking on login on the top right of the website.

*Note: If you are already logged in you can click on your name to access your Member Compass.*



## Member Compass Sections

- Dashboard
- Pay Balance
- Account History
- My Events
- Profile
- Login & Password
- Payment Methods
- Company (*users with mgmt access only*)
- Staff (*users with mgmt access only*)

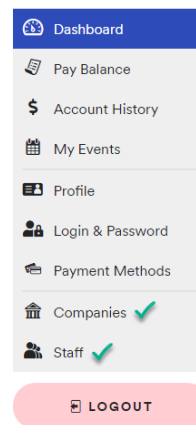
If you are a principal or main contact for your company, been assigned with Company Privileges.

If you can see the Company and Staff tab in the Member menu on the left side of your screen, then you have management access to your company.

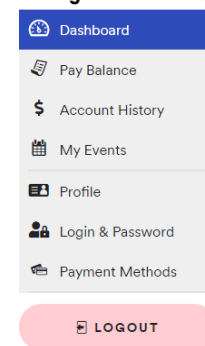
### **Please note: Only users with Company Privileges will have access to:**

- update company member information.
- manage the individual profiles of your company's staff.
- view/print/pay invoices for your ENTIRE company.

#### This Member has Management Access



#### This member does NOT have Management Access



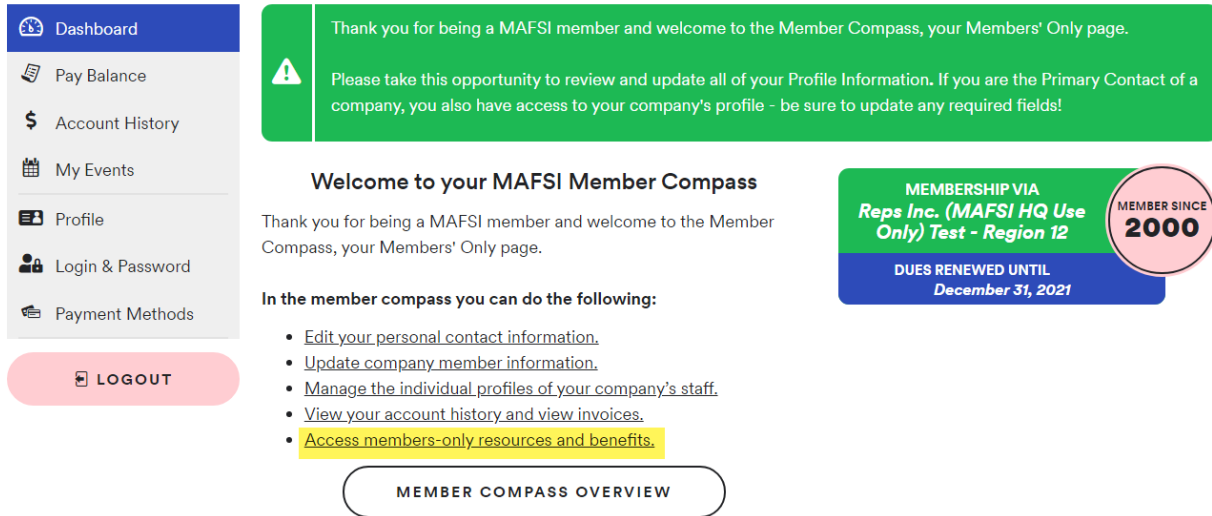
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## Dashboard

The [Dashboard](#) is the first page you will see upon login. This is where you will be able to see your membership status, any outstanding invoices, upcoming events and MAFSI updates.

**Access Members-Only Resources and Benefits** click on the last bullet point in the dashboard of your Member Compass. This will grant access to your Members-Only resources and benefits, like our Best Practices documents, Webinar registration or past recordings, and more

## Member Compass™



The screenshot shows the Member Compass dashboard. On the left is a navigation menu with options: Dashboard, Pay Balance, Account History, My Events, Profile, Login & Password, and Payment Methods. Below the menu is a red 'LOGOUT' button. The main content area features a green banner with a warning icon and text: 'Thank you for being a MAFSI member and welcome to the Member Compass, your Members' Only page. Please take this opportunity to review and update all of your Profile Information. If you are the Primary Contact of a company, you also have access to your company's profile - be sure to update any required fields!'. Below this is a 'Welcome to your MAFSI Member Compass' section with a similar welcome message. To the right is a membership badge for 'Reps Inc. (MAFSI HQ Use Only) Test - Region 12' with 'MEMBER SINCE 2000' and 'DUES RENEWED UNTIL December 31, 2021'. Below the welcome message is a list of actions: 'Edit your personal contact information', 'Update company member information', 'Manage the individual profiles of your company's staff', 'View your account history and view invoices', and 'Access members-only resources and benefits'. At the bottom is a 'MEMBER COMPASS OVERVIEW' button.

## Pay Balance

The [Pay Balance](#) tab shows transactions that have been billed to you.

*Note: Primary Contacts, Billing Contacts, and those with management access will also be able to see open balances for their company, all sub-companies, and related staff.*

## Account History

The [Account History](#) tab that will show transactions that have been billed to you. Here, you can view transactions, pay invoices, or print transactions in bulk.

*Note: Primary Contacts, Billing Contacts, and those with management access will also be able to see transactions billed to their company, all sub-companies, and other related contacts of the company.*

## My Events

The [My Events](#) tab will show any upcoming events you are registered for as well as events you have registered for in the past.

*Please note: It will only show past events that you have attended since switching to the new member system.*

## Profile

The [Profile](#) section allows all individuals to edit their own profile information - such as contact information and other membership fields.

*Note: There are certain fields that we do not allow members to update, if you need to update this information, please contact [info@mafsi.org](mailto:info@mafsi.org).*

## **Login & Password**

The [Login & Password](#) section allows you to see your main Contact Email and Login Email, and to edit your login email and password.

*Note: You must know your current password to make these changes.*

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## **Payment Methods**

In the [Payment Methods](#) tab, you can add, update, or delete saved credit cards.

*Note: You are the only one with access to your saved payment methods. No one else in your company can access this information and it is not shared with MAFSI.*

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## **Company/Companies (Users with Management Access Only)**

The [Company/Companies](#) section allows users with company privileges to edit company information such as contact info and custom membership information.

To learn more about accessing and editing your company information, [click here](#).

*Note: You will not be able to edit the company's name. if you need to update this information, please contact [info@mafsi.org](mailto:info@mafsi.org).*

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## **Staff (Users with Management Access Only)**

The [Staff](#) tab lets users with management access view and make edits to your company's Staff list. In addition to adding, removing, and editing staff profiles, you can also assign/remove management access from other users.

To learn more about managing staff members, [click here](#).

*Note: Adding a staff member does not automatically create a login for the new staff member - that person will still need to create an account on the website.*

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