

What Does the MA Portal Offer

The Fonteva platform is a membership software built on salesforce. It offers online collaborative tools, searchable member directory and helps you to set goals based on real-time data. The items below are things you as the MA can do in working within the system.

- One License per MA (WEF budgets to cover the cost of one license)
- MA can only see their MA membership information
- A Dashboard provides current membership numbers by category in real-time
- Reports - Twelve specific reports have been created for MA use 24/7.
 - Reports Offered:
 - Address Change
 - All Contacts (members)
 - Company Data Transfer Report
 - Expired Member
 - MA Rebate by Date
 - Member Licenses
 - Member Roster
 - My Case
 - New Member
 - Subscriptions by Type
 - UPP Members
 - WEF Committee Report
 - Reports are not customizable
 - Filter options are available
- Cases - MA's can easily communicate with the WEF Customer Service Team. Creating a case will offer the MA the ability to:
 - Address edits related to a member record, or other matter
 - Cases are directly sent to the WEF Customer Service Center Team to be resolved
 - The MA will be able to:
 - View cases submitted
 - Track resolution
 - Chat with the WEF Customer Service Team on matters related to a specific case.
- Member Lookup – MA's can “use” the Member Tab – from the Home page navigation bar – to find a list of MA Members. They can search by category, name, company etc...
- The MA can create a new contact and process payment (check, credit card, EFT)
- The MA is able to print out payment receipt in a PDF format and send a receipt to the member
- Membership information is provided in real-time. The refresh button provides a constant refresh option.

GLOSSARY OF TERMS

- **Contact** = Individual customer (member)
- **Account** = Organization / company
- **Case** = user is able to open a message that goes to the WEF customer service team that can be tracked for resolution and will be part of the historical communication within the system.
- **ROE** = Rapid Order Entry allows the user to process transaction on behalf of the customer / member in the backend quickly and easily.

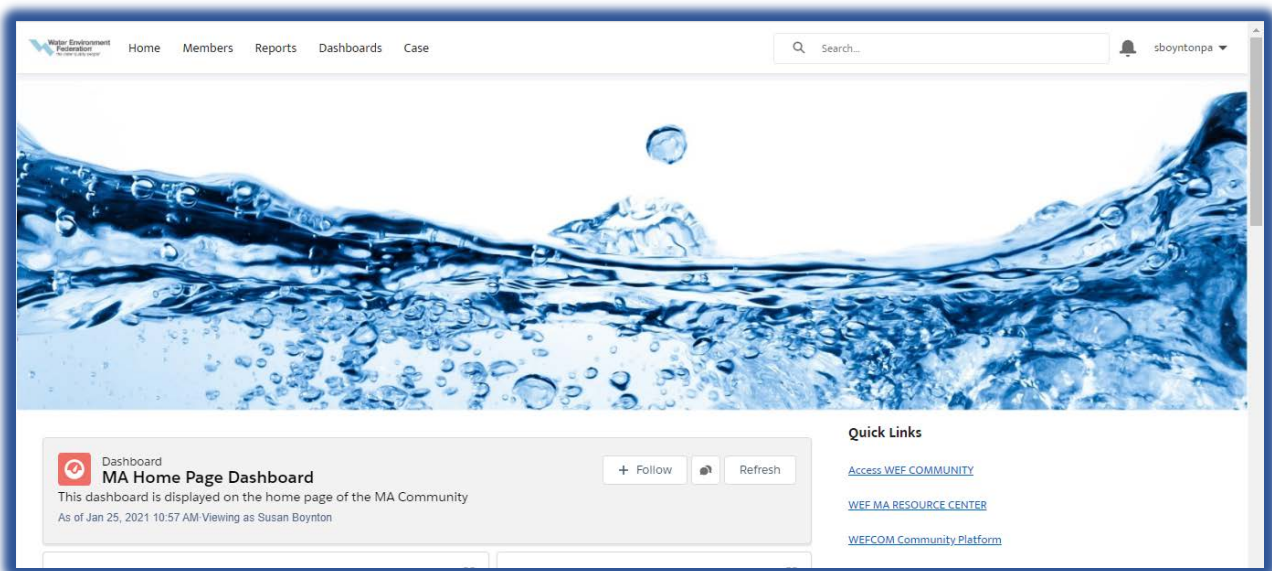
wef Member Association

Logging into the MA Portal

Login to <https://connect.wef.org/MA/s> provided using username and password you created for this system. After successful logging in, you will see the home page below at the top menu of your screen.

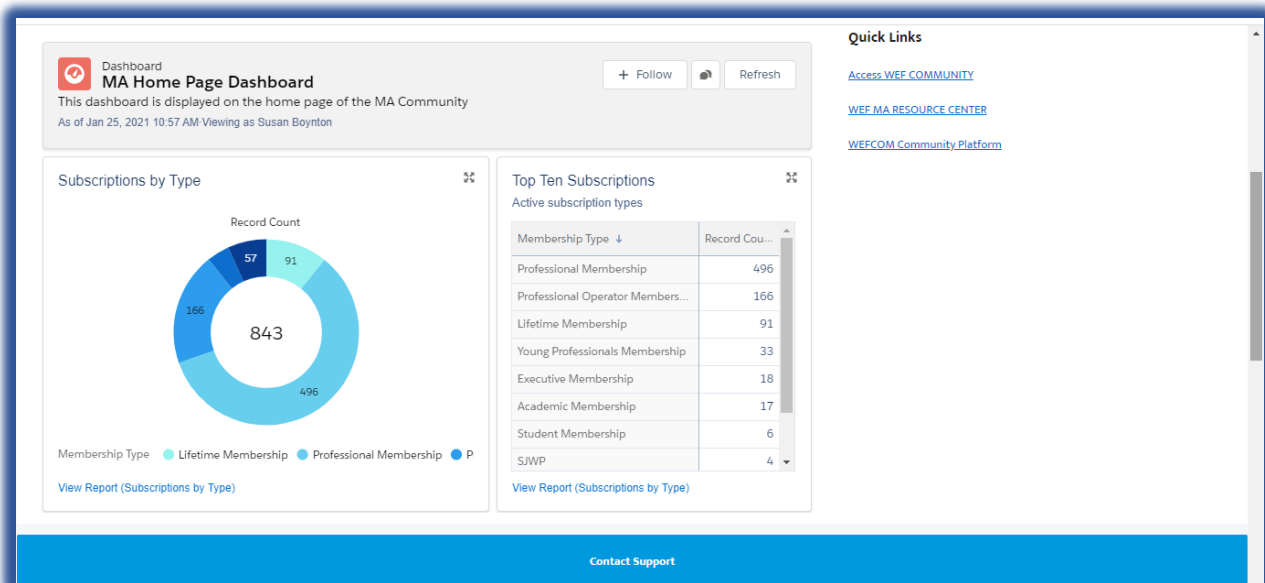
HOME PAGE

The **Home page** houses your dashboard. At the top left, next to the WEF logo, you can click tabs to view your Members, Access Reports, dig deeper into your dashboard and view Cases.

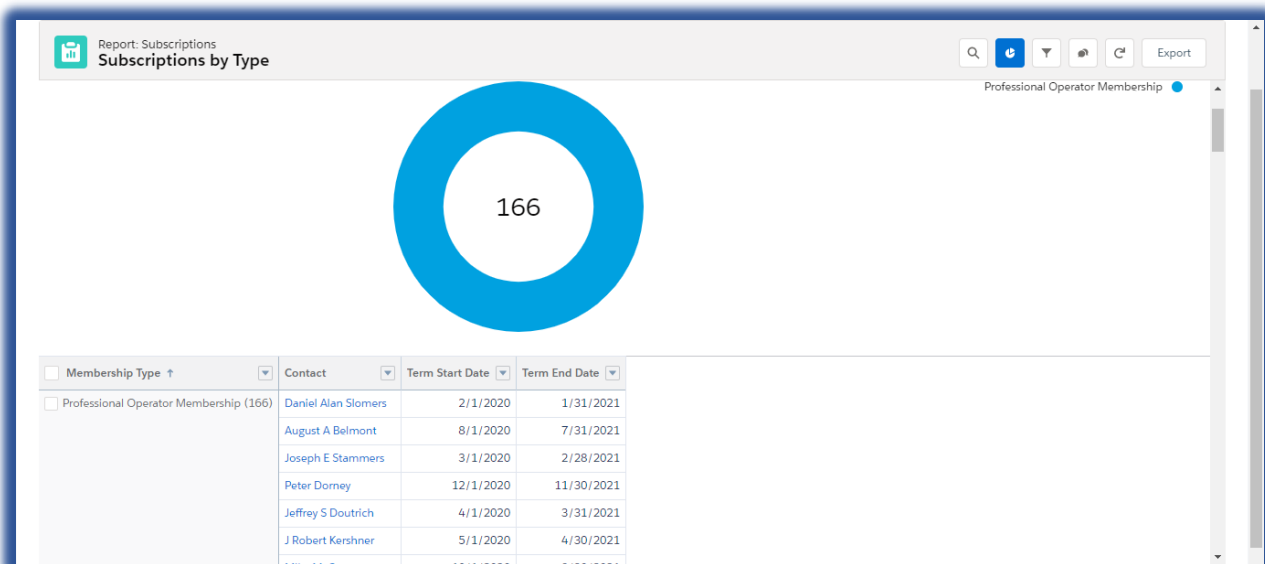


DASHBOARD

The Dashboard is on your Home Page. Here you will find a pie chart of your current membership in real time by type and a list of your top 10 active memberships by category and membership numbers. Notice to the right side some quick links provide access to external WEF communities (WEFCOM) and resources MA Resource Center. It allows you quick access without relogging in with credentials. Also, clicking on the refresh tab recalculates the dashboard to reflect changes in real-time.

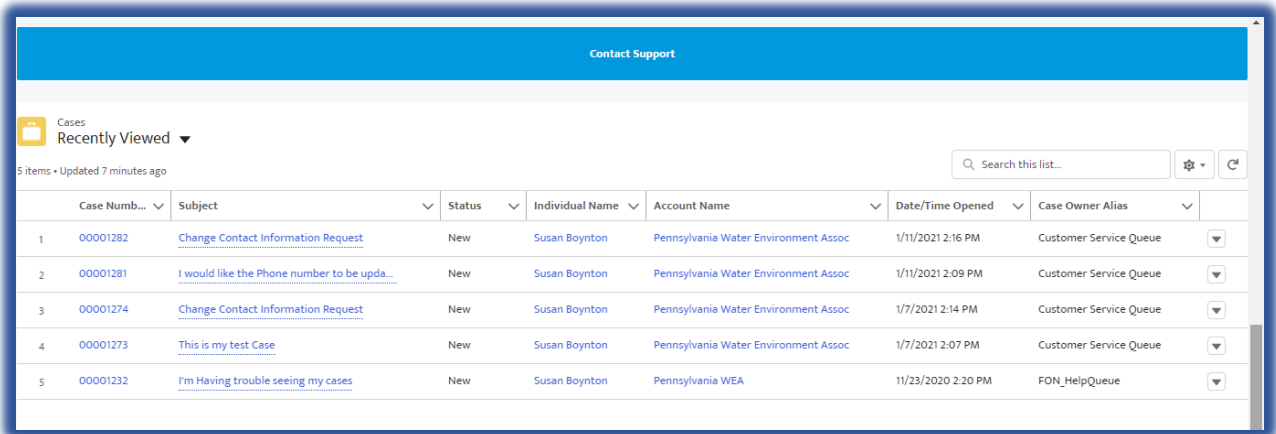


The **View Report** (Subscriptions by type) located under the pie chart allows you to view details of all membership categories and the individual members within each category. **Click on any part of the pie chart** to dig deeper within a particular membership category. Ex: click on the Professional Operator (166 members) and it takes you to the following page that provides all members within the operator category. Here you see their name (with a link into their member record), and their start and end date.



CONTACT SUPPORT

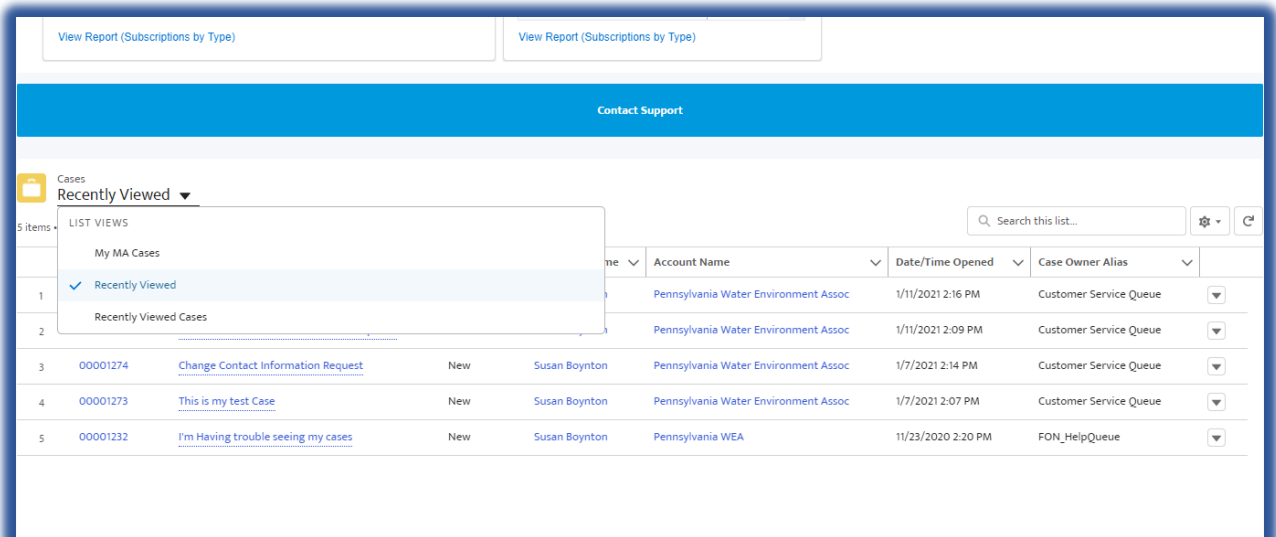
Below the dashboard is the **Contact Support**. Here you will find all cases you have opened and sent to the WEF Customer Service Team about a specific member of your MA i.e., let WEF know of a change to a member's contact information, membership etc... It provides the case number, subject, who created the case, the MA name and the date/time case was submitted.



The screenshot shows the 'Contact Support' dashboard with a table of cases. The table has columns for Case Number, Subject, Status, Individual Name, Account Name, Date/Time Opened, and Case Owner Alias. There are 5 items listed, all with a status of 'New' and created by 'Susan Boynton'.

Case Num...	Subject	Status	Individual Name	Account Name	Date/Time Opened	Case Owner Alias
1	Change Contact Information Request	New	Susan Boynton	Pennsylvania Water Environment Assoc	1/11/2021 2:16 PM	Customer Service Queue
2	I would like the Phone number to be upda...	New	Susan Boynton	Pennsylvania Water Environment Assoc	1/11/2021 2:09 PM	Customer Service Queue
3	Change Contact Information Request	New	Susan Boynton	Pennsylvania Water Environment Assoc	1/7/2021 2:14 PM	Customer Service Queue
4	This is my test Case	New	Susan Boynton	Pennsylvania Water Environment Assoc	1/7/2021 2:07 PM	Customer Service Queue
5	I'm Having trouble seeing my cases	New	Susan Boynton	Pennsylvania WEA	11/23/2020 2:20 PM	FON_HelpQueue

If you click on **Recently Viewed**, you can sort as shown below by: my cases, recently viewed, and recently viewed cases.



The screenshot shows the 'Contact Support' dashboard with the 'Recently Viewed' dropdown menu open. The menu options are 'My MA Cases', 'Recently Viewed' (selected), and 'Recently Viewed Cases'. The table of cases is visible in the background.

Case Num...	Subject	Status	Individual Name	Account Name	Date/Time Opened	Case Owner Alias
1	Change Contact Information Request	New	Susan Boynton	Pennsylvania Water Environment Assoc	1/11/2021 2:16 PM	Customer Service Queue
2	I would like the Phone number to be upda...	New	Susan Boynton	Pennsylvania Water Environment Assoc	1/11/2021 2:09 PM	Customer Service Queue
3	Change Contact Information Request	New	Susan Boynton	Pennsylvania Water Environment Assoc	1/7/2021 2:14 PM	Customer Service Queue
4	This is my test Case	New	Susan Boynton	Pennsylvania Water Environment Assoc	1/7/2021 2:07 PM	Customer Service Queue
5	I'm Having trouble seeing my cases	New	Susan Boynton	Pennsylvania WEA	11/23/2020 2:20 PM	FON_HelpQueue

CREATE A NEW CASE REPORT

If you have edits to a member record or problems within the system, creating a new case report offers you the ability to communicate directly with WEF's Customer Service Team. Once a case is created, both you and WEF will be able to track case responses, and sort for historical information.

To open a new report, click on the blue bar (Contact Support) located below the dashboard and it will take you to the page below. A new case could be a follow-up question or comment in which you would

fill in the Subject and Description or it could be related to edits to a member's record i.e., name, address, email, phone etc... so you can search and select the member name, fill in the subject and brief description of what needs to be done. Then click Confirm (blue button).

The screenshot shows the 'New Case' form in the WEF Customer Service Portal. The form includes the following fields:

- Individual Name:** A search box with the placeholder text 'Search Individual Contacts...'. A magnifying glass icon is on the right.
- *Status:** A dropdown menu currently set to 'New'.
- Subject:** A text input field.
- Description:** A larger text area for providing details.
- Confirm:** A prominent blue button at the bottom center.

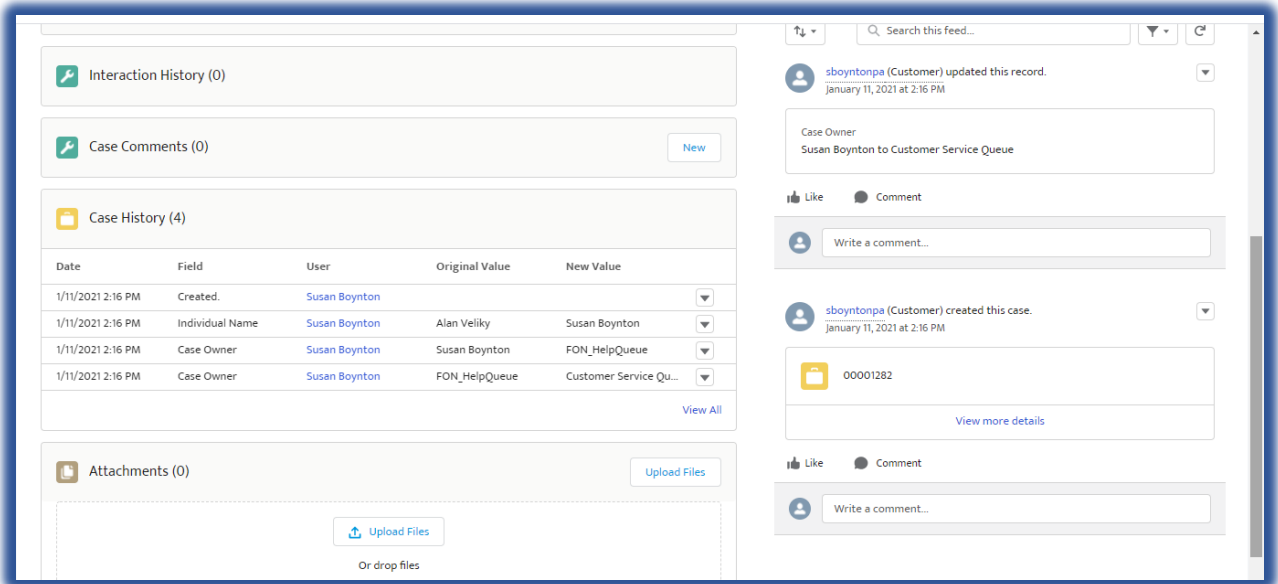
The top navigation bar includes 'Home', 'Members', 'Reports', 'Dashboards', and 'Case'. A search bar and a user profile 'sboyntonpa' are also visible.

It will create a case number sent directly to the WEF Customer Service Team. Cases are listed on the dashboard page under Contact Report The case report has a DETAILS tab and a RELATED tab. The **DETAILS** tab shows the request...and what you need done. You can also use the **Questions** section located on the right side of the page to further communicate with the WEF Customer Service Team on additional comments, status etc...

The screenshot displays the details for Case 00001282. The page is divided into several sections:

- Case Header:** Shows 'Case 00001282' with '+ Follow' and 'Printable View' buttons.
- Case Metadata:** A table-like view showing:
 - Subject: Change Contact Information Request
 - Priority: Medium
 - Status: New
 - Individual Name: Susan Boynton
 - Individual Phone: (717) 642-9500
 - Case Origin: Community Portal
- Navigation:** 'DETAILS' and 'RELATED' tabs.
- Case Information:**
 - Case Owner: Customer Service Queue
 - Case Number: 00001282
 - Individual Name: Susan Boynton
 - Account Name: Pennsylvania Water Environment Assoc
 - Membership Status: [edit icon]
 - Case Currency: USD - U.S. Dollar
 - Case Source: [edit icon]
- Individual Contact Info:**
 - Individual Phone: (717) 642-9500
 - Individual Email: sboynton@pwea.org.test
- Question Section:** A 'Question' input field with an 'Ask' button and a search bar for the feed.
- Activity Feed:** A notification from 'sboyntonpa (Customer)' stating 'updated this record. January 11, 2021 at 2:16 PM'. Below it, the case owner 'Susan Boynton to Customer Service Queue' is listed.
- Interactions:** 'Like' and 'Comment' buttons, and a 'Write a comment...' input field.

The **RELATED** tab allows you to add a file or photo/image. This can be very helpful to assist the WEF Customer Service Team in processing the request.



By using the case submission system, you and WEF can better track requests efficiently. It will also work nicely for attaching a spreadsheet providing large number of changes. We hope it will be a feature you will find useful and take advantage of. You can also access your cases on the Home page by clicking the Case tab at the top of the page.

MEMBER TAB

On the home page (dashboard), go to the top bar and click on the **Member tab**. This is another way to view all your members. You can sort by name, account number, phone, email, title or you can use the search option to locate a member using their full name, first name or last name. You can also do a global search (the search option is located on the top bar to the right of the Case tab). This allows you the ability to look for a specific person, case, recent view etc...

Water Environment Federation
Home Members Reports Dashboards Case

Individual Contacts
MA Portal - All Contacts

50+ items • Sorted by Account Name • Filtered by All Individual contacts - Is MA Affiliated • Updated a few seconds ago

	Name	Account Name	Phone	Email	Title	Indiv...
1	Amy E Perry	Abbotstown Paradise Joint Sewer Auth	(717) 259-9120	aperry@apjsa.com.test		
2	Robert S Leber	Abington Wwp	(215) 234-1803	rleber@verizon.net.test		
3	George R Wrigley	Abington Wwp	(215) 884-8329	gwrigley@abington.org.test		
4	Ruth Patrick	Academy of Natural Sciences of Philadelphia	(215) 299-1098			
5	Harold P Neff	Advanced Fluid Systems Intl Inc	(570) 327-1711			
6	Timothy C Dean	AECOM	(724) 602-1909	timothy.dean@aecom.com.test	Area Water Sector Lead	
7	Mary Elizabeth Miller	AECOM	(484) 274-3517	mepaskewicz@gmail.com.test		
8	Haluk Bafrafi	Aerisa	(412) 735-0565	hbafrafi@aerisa.com.test	Director of Sales and Marketing	
9	Karen M Mancl	Ag Engineering	(614) 292-4505	mancl.1@osu.edu.test		
10	John D Findley	Alcosan	(412) 734-8730	john.findley@alcosan.org.test		

The MA Portal – All Contacts lists all members associated with your MA. Clicking on the arrow by the MA Portal – All Contacts additionally offers two other search options (Recently Viewed (Pinned) and Recently Viewed Individual Contacts) as shown below.

Water Environment Federation
Home Members Reports Dashboards Case

Individual Contacts
MA Portal - All Contacts

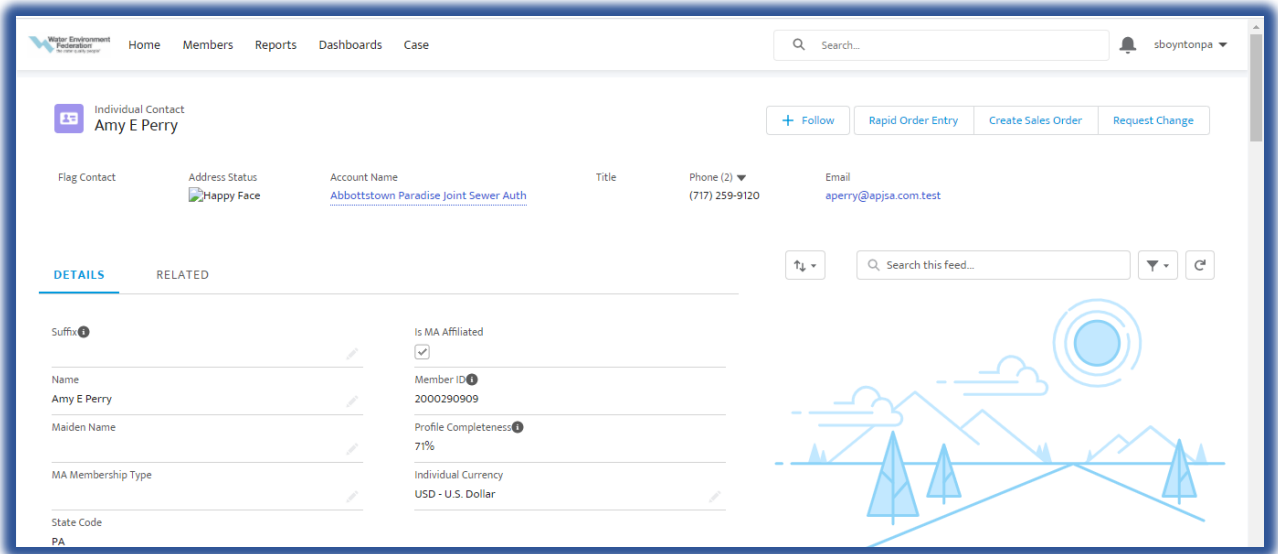
50+ items

LIST VIEWS

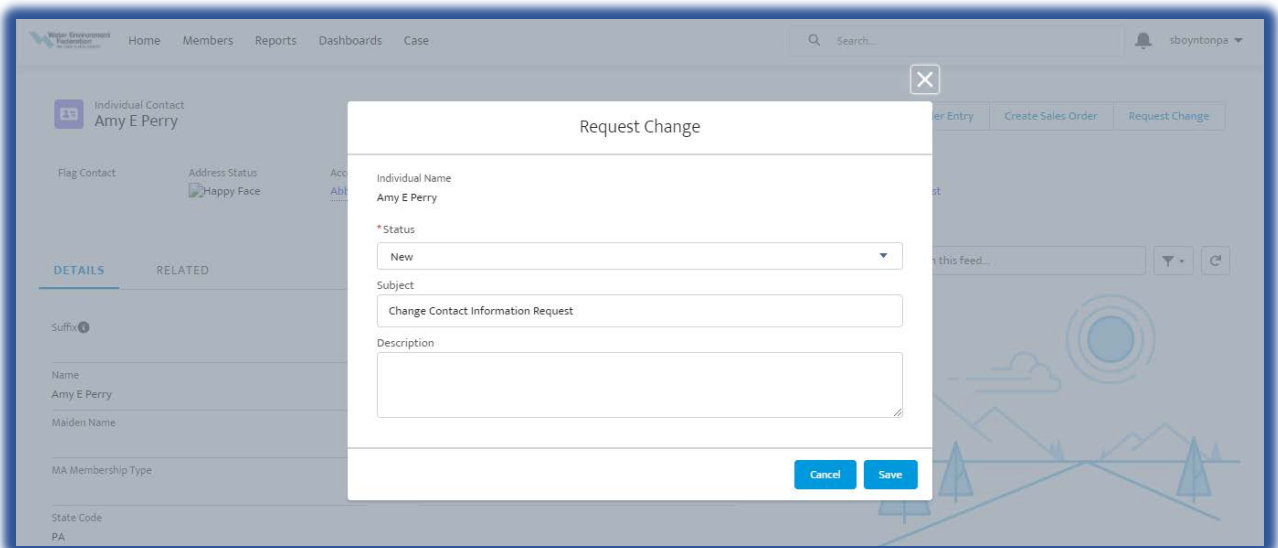
- MA Portal - All Contacts
- Recently Viewed (Pinned list)
- Recently Viewed Individual Contacts

	Name	Account Name	Phone	Email	Title	Indiv...
1	Amy E Perry	Abbotstown Paradise Joint Sewer Auth	(717) 259-9120	aperry@apjsa.com.test		
2	Robert S Leber	Abington Wwp	(215) 234-1803	rleber@verizon.net.test		
3	George R Wrigley	Abington Wwp	(215) 884-8329	gwrigley@abington.org.test		
4	Ruth Patrick	Academy of Natural Sciences of Philadelphia	(215) 299-1098			
5	Harold P Neff	Advanced Fluid Systems Intl Inc	(570) 327-1711			
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9	Karen M Mancl	Ag Engineering	(614) 292-4505	mancl.1@osu.edu.test		
10	John D Findley	Alcosan	(412) 734-8730	john.findley@alcosan.org.test		

When in a member record, you can open a new case. Click on **Request Change** to notify WEF's Customer Service Team that something within this member's record needs specific editing. The Request Change is located at the top right of the page next to create a sales order as shown below.



When you click on **Request Change**, you will be asked to fill in the name and description of what needs to be edited. Another avenue to quick access in communicating with WEF on necessary edits. Click save and a new case will be created. You and WEF will get notification.



REPORT

The Report tab will show you all Reports, Folders and Favorites you have access to. **The system defaults to the reports you use most often.** If you don't see your report, then click on the All reports option in the left menu. See image below.

List of Reports Offered:

Address change; All Contacts; Company Data Transfer Report; Expired Members; MA Rebate by Date; Member Licenses; Member Roster; My Cases; New Members; Subscriptions by Type; UPP Members; and WEF Committee Report

Water Environment Federation
Home Members **Reports** Dashboards Case

Search...

Reports
Recent
11 Items

Search recent reports...

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Subscriptions by Type		MA Community Report	Fonteva Admin	12/15/2020, 9:17 AM	
Created by Me	WEF Committee Roster		MA Community Report	Fonteva Admin	10/13/2020, 12:31 PM	
Private Reports	Company Data Transfer Report		MA Community Report	Fonteva Admin	11/30/2020, 9:30 AM	
All Reports	Contact Data Transfer		MA Community Report	Fonteva Admin	12/15/2020, 9:32 AM	
FOLDERS	MA Rebate by Date		MA Community Report	Fonteva Admin	8/3/2020, 5:21 PM	
All Folders	UPP Members		MA Community Report	Fonteva Admin	12/10/2020, 11:58 AM	
Created by Me	Address Change		MA Community Report	Fonteva Admin	12/10/2020, 12:09 PM	
Shared with Me						
FAVORITES						
All Favorites						

You can select the **All Reports** to see the full list. See image below.

Water Environment Federation
Home Members Reports Dashboards Case

Search...

Reports
All Reports
13 Items

Search all reports...

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Address Change		MA Community Report	Fonteva Admin	12/10/2020, 12:09 PM	
Created by Me	All Contacts	All contacts associated with the MA	MA Community Report	Fonteva Admin	11/19/2020, 3:48 PM	
Private Reports	Company Data Transfer Report		MA Community Report	Fonteva Admin	11/30/2020, 9:30 AM	
All Reports	Contact Data Transfer		MA Community Report	Fonteva Admin	12/15/2020, 9:32 AM	
FOLDERS	Expired Members		MA Community Report	Fonteva Admin	12/30/2020, 8:01 AM	
All Folders	MA Rebate by Date		MA Community Report	Fonteva Admin	8/3/2020, 5:21 PM	
Created by Me	Member Licenses		MA Community Report	Fonteva Admin	10/13/2020, 12:29 PM	
Shared with Me						
FAVORITES						
All Favorites						

For example: Select the MA Rebate Report. This automatically provides you the rebates owed to the MA for the current month. You have the ability to **filter** by all receipts and filter by posted date as shown below i.e., current FY or previous FY.

Report: Receipts with Receipt Lines
MA Rebate by Date

Total Records: 6 Total Total: USD 275.00

	Membership Number ↓	First Name ↓	Last Name ↓	WEF Membership Type ↓	Membership Start D
1	2000433116	Lucia	Guerrero	Professional Membership	1/1/
2	2000432829	Kara	Smith-Leon	Professional Membership	1/1/
3	2000432026	Sally	Kirk	Professional Membership	1/1/
4	2000432025	Alice	Perez	Professional Membership	1/1/
5	2000431622	Lebron	James	Professional Membership	1/1/
6	2000428997	test upp portal	cp	Professional Membership	1/1/
7					

Notice the Export tab on the upper right corner allows you to export your reports in an excel or csv format. You will be responsible for running all your reports to include your rebate report (WEF will no longer send these out monthly as the system provides this for you).

CREATE A NEW MEMBER RECORD

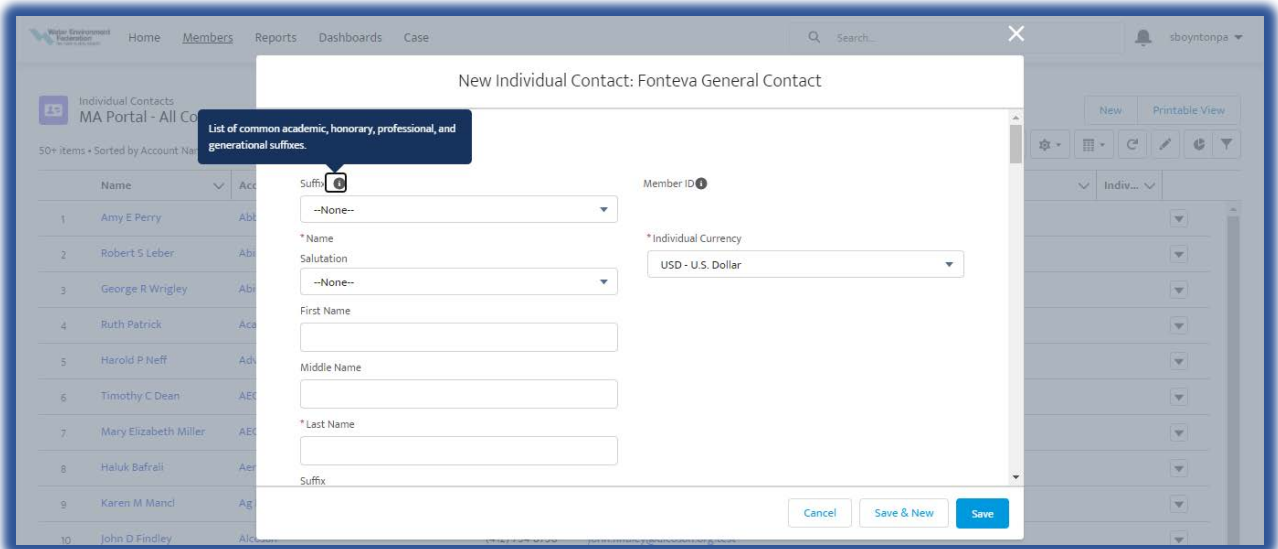
Go the Home Page and click on Member. Then click on the New button on the top right side of the page.

Individual Contacts
MA Portal - All Contacts

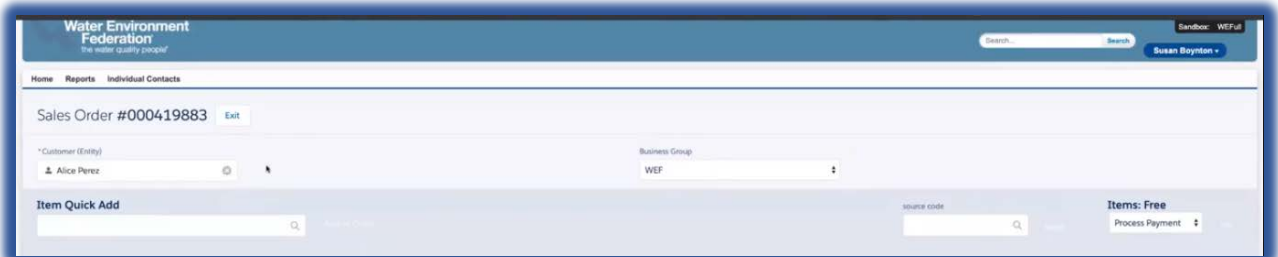
50+ Items • Sorted by Account Name • Filtered by All individual contacts - Is MA Affiliated • Updated a few seconds ago

	Name ↓	Account Name ↑	Phone ↓	Email ↓	Title ↓	Indiv... ↓
1	Amy E Perry	Abbotstown Paradise Joint Sewer Auth	(717) 259-9120	aperry@apjsa.com.test		
2	Robert S Leber	Abington Wwp	(215) 234-1803	rsleber@verizon.net.test		
3	George R Wrigley	Abington Wwp	(215) 884-8329	gwrigley@abington.org.test		

It takes you to a form that will need to be fill out. It is important to fill out as much information as possible that you have for the member and note there are a few required fields to fill out in order to process the membership. The click **Save**.



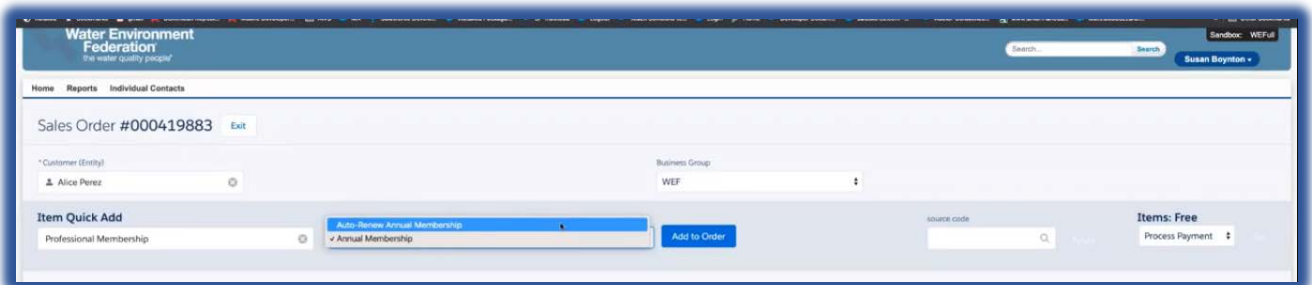
You will then see your new contact has been added into the system. On this contact's page, under DETAILS, you will see the information filled out however if you click on the RELATED tab, there is nothing listed. Once the membership payment is processed, then the RELATED tab will show data on this new contact/member. Click on the Rapid Order Entry at the top right side of the page to process membership payment. It will take you to the sales order page as shown below. Here you will see the name of the contact is automatically filled in. The Business group will always be WEF.



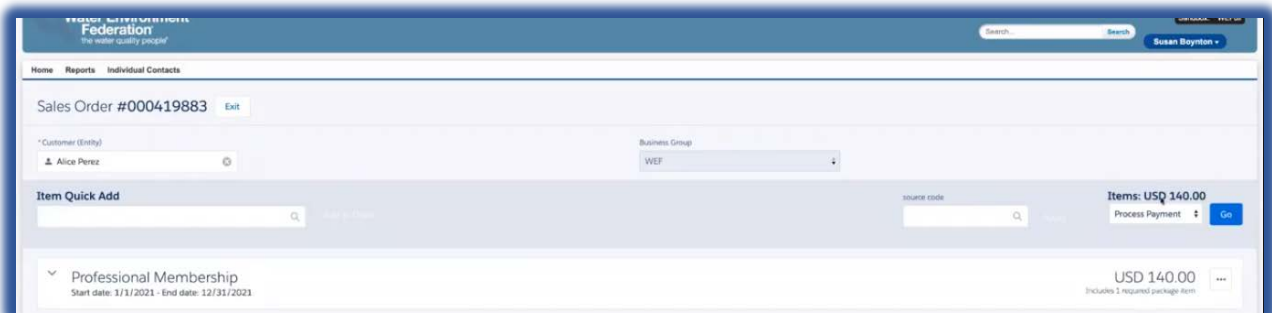
In the **Item Quick Add Field**, type in membership category. As you type, membership options will appear. Click on the specific membership.



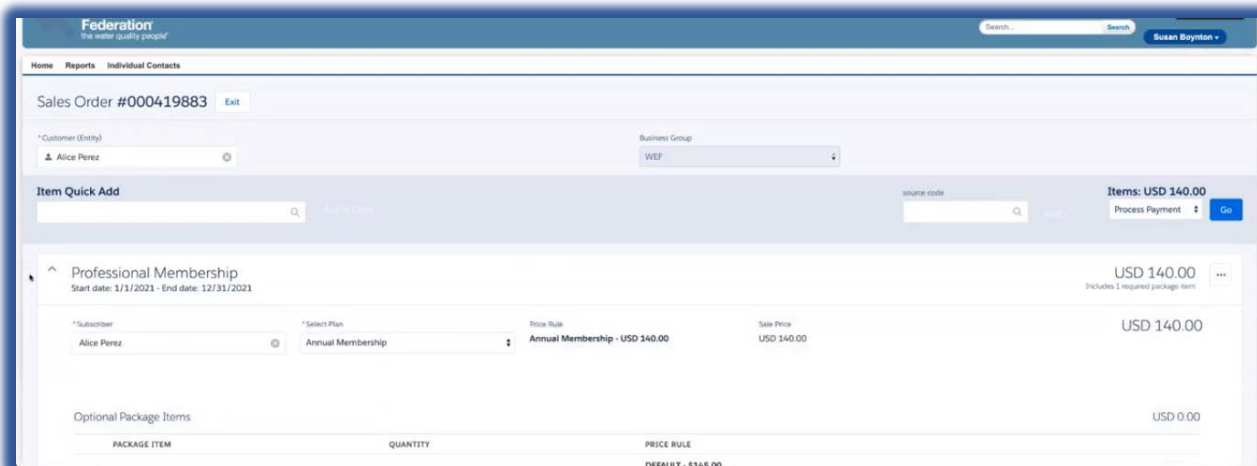
You are provided two options – Select Annual Membership or Auto Renew (Auto Renew means you must provide a credit card on file in order to participate in the auto renew option). Select your option and click the **Add to Order** button.



Within a minute, you will see the **Items: Free** has not calculate the cost of WEF portion of the membership as \$140.00.



Click on the arrow next to the Professional Membership to add in the Member Association membership.



A list of MAs are provided. Scroll to select the MA membership for this member's record.



The MA fee is added to the order, recalculating to a final cost of \$195.00 as shown below.

Water Environment Federation
The water quality people!

Home Reports Individual Contacts

Sales Order #000419883 [Exit](#)

*Customer (Entity) Alice Perez Business Group WEF

Item Quick Add resource code

Items: USD 195.00

Professional Membership
Start date: 1/1/2021 - End date: 12/31/2021 USD 195.00
Includes 1 required package item

*Subscriber Alice Perez *Select Plan Annual Membership Price Rule Annual Membership - USD 140.00 Sale Price USD 140.00

Optional Package Items USD 55.00

PACKAGE ITEM	QUANTITY	PRICE RULE
		DEFAULT - \$143.00

Now click the Process Payment Go button underneath the fee. You will be redirected to a payment page. From the Payment Section, select the type of payment (Check, Credit Card, EFT etc..).

WEF Apply Payment [Advanced Settings](#) [Cancel](#) [Previous](#)

Customer Information
Account/Contact Alice Perez Available Credit USD 0.00 Credit Applied USD 0.00 Payment Applied USD 195.00

Payment Section
Payment Type Reference Number Batch Deposit Account 00-10013-0000000 - CAPITAL ONE OPERATING Payment Date 01/07/2021 Priced Date 01/07/2021

Offline - Check
 Offline - Credit Card
 Offline - EFT
 Offline - Account Credit
 Offline - Other
 Credit Card
 ECheck

Override Credit Applied \$0.00 Payment \$195.00

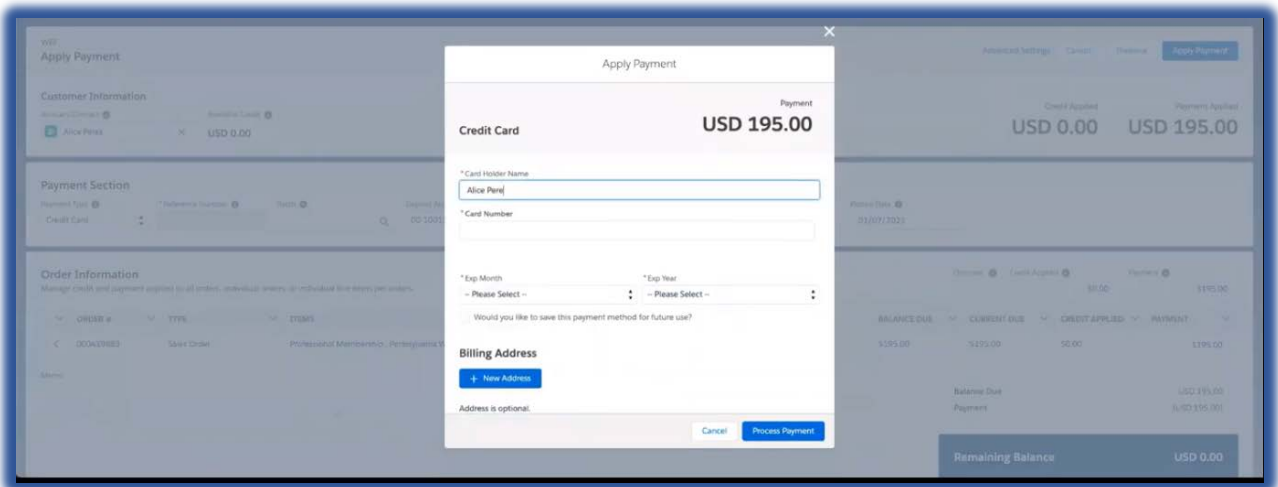
ORDER #	TYPE	ITEMS	DUE DATE	BALANCE DUE	CURRENT DUE	CREDIT APPLIED	PAYMENT
< 000419883	Sales Order	Professional Membership, Pennsylvania WEA, Water Environment & Technology		\$195.00	\$195.00	\$0.00	\$195.00

Memo

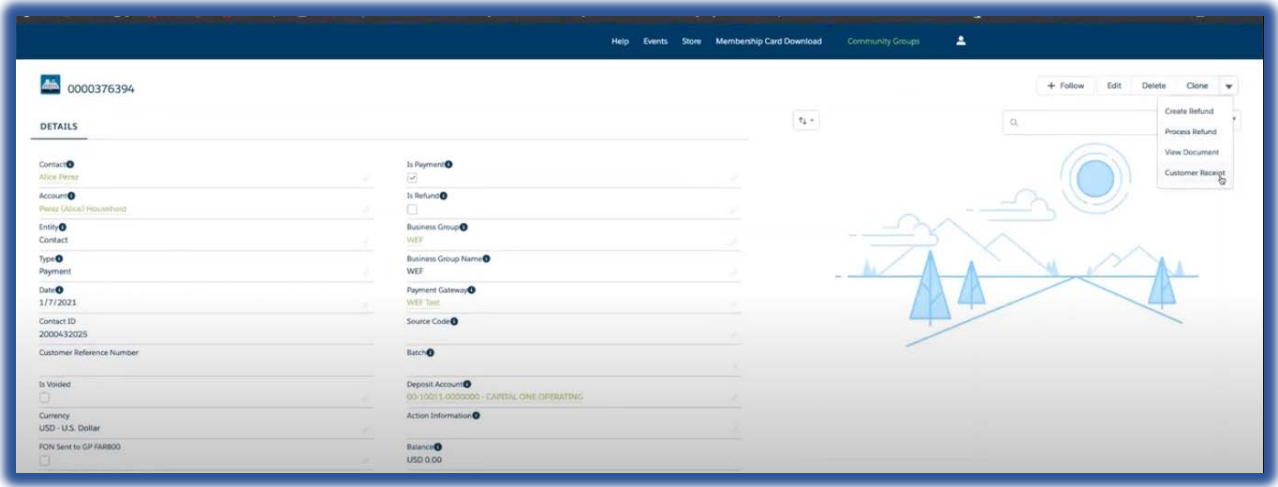
Balance Due USD 195.00
Payment (USD 195.00)

Remaining Balance USD 0.00

In the upper right side of the page, click on **Apply Payment**. It will direct you to a form to fill out the credit card payment. Click **Process Payment**.



You can see all details processed along with you can select to view the receipt of send receipt. In the upper right side of the page, click on the arrow next to Clone. Here you can select to view the receipt of click on customer receipt...see below.



Below is the customer receipt. You can download it as a PDF, print it out, or send PDF in an email.

Water Environment Federation
601 Wythe St
Alexandria, Virginia 22314
United States
(703) 684-2400



THANK YOU!

Receipt Header

Date	1/7/2021
Receipt Number	0000376394
Customer	Alice Perez
Total	USD 195.00

QUANTITY	LINE DESCRIPTION	LIST PRICE	SALE PRICE	TOTAL
1	Professional Membership	USD 140.00	USD 140.00	USD 140.00
			SUBTOTAL:	USD 195.00
			TOTAL:	USD 195.00