

Winnipeg Executives Association

Website Address: <http://www.wpgexecs.ca/>

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John Heppenstall's company, Hep Communications was selected by the Winnipeg Execs to produce a new public website and accompanying private members site. Its members can update their profiles, input their Leads, Business With, and Visitations, and easily view their MOV reports through this new Members website. This document will introduce members to the new system and provide instructions on how to use it.

The Home Page

This is your starting point when you visit the [wpgexecs.ca](http://www.wpgexecs.ca) website. It has a navigation menu across the top that will take you to the pages. On the home page, the “Member Log-In” is located on the grey bar just above the member spotlight. You will use the log in to get to the members-only area, to view and update your profile information, submit Leads, Business With reports, and Visits etc. Once in this area, you can also use the search box on the right to find members, or click on the “Browse the Member List” to see all members in an alphabetically-sorted list (by company name). We encourage members to Bookmark <http://members.wpgexecs.ca> to have quick access to the Log-In Page.

Log In

In order to actually enter any data into the system, or to view any records other than the members list, you will need to log in to the members-only site.

If you can't remember your password, you can click on the “Reset Password” link under the login box (or from the stand-alone Login Page). You will then need to enter your User ID – usually your own name in FirstLast format (eg. JohnHeppenstall). If you don't remember your User ID, you can enter your name in the “Search by Name” field and then click on your name on the drop-down list that appears. This will fill in your User ID automatically.

Once you click on the “Reset Password” button, the system will reset your password, generate a new one, and email it to the email address you currently have on file in your Profile. This email address will be displayed here after the email is sent. If the email address is incorrect or you don't receive the email, please contact Chris Pappas at 992-6400 ext. 24 or email cpappas@hepcom.ca for assistance.

When you have logged in successfully, you'll see your User ID appear in the upper right corner, along with links to “Edit Profile” and “Log Out”. You can change your password and update your profile information by clicking on “Edit Profile”.

The Members Home Page

After logging into the members site, you will see additional information for the current month in the left column of the home page, including your Attendance records, Leads, Business With, and Visitations. These menu items also include links to common tasks for each of these areas.

Member Profiles

Each member has their own “Profile” page, which can be accessed by searching for the member or browsing the member list and then clicking on their name. You can access your own profile when logged in by clicking on the “Edit Profile” link in the upper right corner.

When viewing your own profile, you will see links at the bottom of the page to “Edit Profile” or “Manage Photos”. You can edit the information contained within your profile by clicking on the “Edit Member Profile” link.

The “Edit Profile” page has a link to “Change Member Password”, click on this to set your own password for the system. On the Change Member Password page, enter in your new password, which must be at least 6 characters long, into both of the input boxes to ensure that it was typed correctly. When finished, click on the “Change Password” button to apply the change.

Editing your Profile

All of the fields are fairly self-explanatory – you can enter your Company name, your Contact name, update your email address, phone number etc. The fields at the bottom (“Picture Image File”, “Logo Image File”, “Embedded Content”) can be used to include a picture or a company logo from a URL (such as directly from your website), and embedded content such as YouTube videos. You can also use the boxes at the top-right of the form to upload your Profile Image and Logo Image.

Profile/Logo Image and Manage Photos

Click on “Upload Image” to go to the “Upload a file” page. Click on Browse to choose a picture from your local computer, then click on Upload to send it to the website. After the file uploads, the system will display your new image. Click on the “Return to File Listing” link at the bottom of the page to return to your list of files. This will display all of the images you have uploaded to your profile. You can upload another picture by clicking on the “Upload a new Photo” link.

When you're finished uploading your images, click on “Back to Profile” to view your profile once again. You can then click on “Edit Profile” to bring up the profile editing page, where you can then assign your newly-uploaded images to be your profile image or logo. Click on the image so that it appears inside of the grey box under either Profile Image or Logo Image, and you will notice that the corresponding field at the bottom of the page will also be filled in automatically. Click on the “Save Changes” button to apply your changes.

Leads

Submitting your leads through the online form must be done every month in order to earn your full MOV points. You can view the leads you have submitted, and also those that you have received, by clicking on the Leads menu item at the top of the screen, or by clicking on “View My Leads” from the Home Page menu.

The Leads page shows you the list of leads you have received from other members, as well as a

listing of all of the leads submitted by other members. You can use the controls at the bottom of the page to view other month's information. By default, most of the information about each lead is hidden to save space – to view this information, click on the double arrows at the left of each lead to display its full listing.

To add a new Lead, click on the “Add New Lead” link in the home page menu, or on the “Submit a New Lead” link at the top of the Leads Page. You will then see a form that mirrors the physical paper forms that you might be familiar with. Your name and company, and today's date should already be filled automatically, but if not, then start typing your name into the “From” field and an auto-complete drop-down box will appear, from which you can choose your name. The “Company” field will automatically be filled in as well when you select a name from the drop-down box. To choose a different date, click in the “Date” field and a calendar should appear, from which you can choose your date.

If this is a General lead (intended for all Members), then click on the round button next to “General Lead”, and you will see the “To” and “Company” fields disappear. If this is a Direct lead then obviously click on the round “Direct Lead” button.

For Direct leads, you must specify the member that will be receiving the lead. Start typing their name and the auto-complete box will appear as described above. Click on the person's name to add it and their Company automatically. The rest of the fields here should be familiar to the Members - “Person to contact”, “Phone” etc. are all optional but it's good to fill in as much information as possible so that the recipient can follow up on this lead immediately. Click on the Submit Lead button when finished. The system will record your lead, and send an email to the WEA Administration, to the recipient, and also to yourself.

Business With

Business-With reports must also be entered before Midnight on the last day of each month, through the web interface in order to earn your full MOV points. You can see a listing of who you have done business with, and who has done business with you during that month, by clicking on the “Business With” menu item at the top of the screen, or by clicking on the “View My Business With Reports” menu link on the home page.

To update the current month's record, click on “Update This Month's Report” from the Home page menu, or on the “Update this month's Business-With record” link on the Business With summary page. This page shows a drop-down box with which you can view previous month's reports, a button to save your changes, and the current statistics on the right side – this stats box is updated in real-time as you check or uncheck members from this list. Check all of the members that you have done business with in the past month, and you will see the count and your points earned (up to the maximum of 30) reflected in the stats box in the upper right corner. Click on the “Save Changes” button when finished.

Visits

Visits are nearly identical in function to the Business With records – you can view and update your records for the current month in the same manner as your Business With records. Click on the “Visits” menu item at the top of the screen, or on the “View my Visitation Reports” menu item on the Home page to view the visits you have recorded. Update your monthly visitation reports by clicking on the “Update this Month's Visits” menu item on the Home page or by clicking on the “Update this month's Visitation records” link on the Visits summary page.

Attendance

Attendance will still be recorded manually at the meetings for next couple of weeks. We are currently testing the new touch screen application that will auto-record your attendance as you enter the meeting. When this is ready, we will be publishing instructions in the bulletin.

Business Profile Talks and Special Events Points

We are currently in development of this application. If you have done a business profile talk in January, it will be recorded manually and updated by the administrator. The application to record attendance of special events will be in place before the next special event.