NAMI 360 Manual

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Welcome to NAMI 360!

The NAMI 360 system was launched in May 2012 to replace and integrate NAMI's online membership submission system, TouchBase, its back-end database, Raiser's Edge and web site platform, Active Matter.

The benefits of using NAMI 360 to process your membership updates include:

- Members’ open access to Online Benefits immediately after dues are paid in NAMI 360;
- NAMI State Organizations and Affiliates receive their share of dues monthly;
- updates happen in real-time, and updated data is immediately accessible; and
- up-to-the-minute online accessible membership reports that you can generate at your convenience.

This manual includes step-by-step instructions on using NAMI 360 system to manage NAMI State and Affiliate memberships and profile information. There is also an online help site with training videos, presentations and more that can be found at http://extranet.nami.org/NAMI360Help

To access NAMI 360, go to NAMI.org and use the login information you received from NAMI to login on the left-hand side. Once you login, scroll to the bottom and click the “NAMI State Organization and NAMI Affiliate Management” link.

If you do not already have a login or access to NAMI 360, contact memberservices@nami.org.
The NAMI 360 Home page, shown below, displays the links to the main functions of the system as icons and left hand navigation. Click an icon in the middle of the screen or a link in the left hand navigation to be taken to that page. The left hand navigation appears on every NAMI 360 page along with the red “Help” link, located in the upper right hand corner.

The NAMI 360 Home page includes the following links:

- **Search – Query**: where you can search for individuals and members associated with your NAMI State Organization or NAMI Affiliate
- **Add Individual**: where you can add a new individual or a new member to your data
- **Bulk Membership**: where you can renew multiple members at a time
- **Manage eBatches**: where you can create, edit and delete eBatches
- **Generate Reports**: where you can create reports about your data
- **State/Affiliate Profile**: where you can edit your NAMI State Organization’s or NAMI Affiliate’s contact information
- **State/Affiliate Leaders**: where you can add, edit and remove your NAMI State Organization’s or NAMI Affiliate’s leaders and their contact information
- **NAMI 360 Help**: a direct link to the Help Site with training videos, instructions and more
- **NAMI 360 Suggestions**: where you can send your feedback and suggestions for NAMI 360 directly to NAMI
- **Contact NAMI**: a page with the contact information for NAMI’s Information Services staff
- **Logout**: click to logout and leave the system
- **Help**: (upper right hand corner) brings you to the NAMI 360 Help Site where you can find instructions on how to use the system
Search-Query

Topics:
- Search Criteria
- How to Search
- How Turn Search Results Into A Report
- Additional “Search-Query” page functions

The Search-Query page, shown below, allows you to search for individuals and members associated with your NAMI State Organization or NAMI Affiliate.

Search Criteria:
Individuals’ Personal Information:
- **Record ID**: The number listed under each individuals name on their Individual Profile page.
- **First Name**
- **Last Name**
- **City**: the city a member lives in
- **State**
- **Zip**
- **Phone**
- **Fax**
- **Email**
- **Note**: If you have previously entered notes for an individual record, you can search those notes here.
- **Individual Type**: This includes categories such as Company Contact, Law Enforcement and Media so you can track specific types of individuals.

Membership Information:
- **Associated With**: displays non-members or members who are associated with the NAMI State Organization or NAMI Affiliate that you select from the dropdown menu
- **Membership With**: displays members who have an active, lapsed or dropped membership with the NAMI State Organization or NAMI Affiliate that you select from the dropdown menu
- **Join Date**: the date when a member first joined NAMI
- **Effective Date**: a member’s most recent renewal date
- **Expiration Date**
- **Membership Type**: Open Door and Regular
- **Membership Status**: active, lapsed, dropped or non-member (individuals who have never had a membership with NAMI)
- **Membership Source**: Affiliate (a NAMI State Organization or NAMI Affiliate added the member through NAMI 360), NAMI (a NAMI employee added the member at the NAMI office) or Online (a NAMI member added themselves through the NAMI website)

**How to search:**

**To search for a member:**

1. Enter your search criteria
2. Click the “Search” button in the bottom right-hand corner

A list of results will appear similar to those shown below. When searching for an individual by name enter the first letter of their first name and the first few letters of their last name. By using this method you are more likely to find who you are searching for despite any spelling errors in the database or if the individual goes by a nickname. For example: search “first name: j” “last name: mad” to find James or Jim Madison.

![NAMI 360 Search-Query Screen](image)

**How Turn Search Results Into A Report**

To turn your search results into a report that you can view in Microsoft Excel:

1. Enter your search criteria
2. Click the “Search” button in the bottom right-hand corner, a list of results will appear
3. Click the “Export to CSV” button, next to the “Search” button, on the right-hand side of your screen above your search results.

**Additional “Search-Query” page functions:**

Once your search results have appeared you can sort them by category by clicking the blue, underlined category titles at the top of each column. For example: click “Last Name” to sort your results alphabetically by last name. To view an individual’s profile page click the blue, underlined number next to their name in the search results. For example: to view Susan Smith’s profile click “500128411” next to “Smith, Susan”
Add Individual

Topics
- NAMI Add Individual Wizard Fields
- How to Add an Individual Without a Membership
- How to Add Information or Edit Existing Information on an Individual’s Profile
  - How to Add, Edit, and Delete an Individual’s Contact Information
  - How to Add or Edit an Individual’s Demographics
  - How to Add a Related Individual
  - How To Add a Subscription to an Individual’s Record

The Add Individual page, shown below, allows you to add an individual who is not a member or an individual who is a member to your NAMI State Organization’s or NAMI Affiliate’s data.

NAMI Add Individual Wizard Fields
- Prefix (optional): Dr., Mr., Mrs., or Ms.
- First Name (required): Only enter one person’s first name
- Middle Name (optional)
- Last Name (required): Only enter one person’s last name
- Suffix (optional): Jr., Sr., II, III, IV, V, VII
- Email (recommended): primary emails must be unique to each individuals. Individuals cannot share primary email addresses.
- Phone Number (optional)
- Ext (optional): phone number extension
- Fax Number (optional)
- Organization Name (optional): this appears as the first line of an individual’s address. If you are entering a business address and would like to include the name of their company in the address, enter it in this field.
- Address Line (required): first field is the first line of the individuals address (unless you added an organization name), second field is the second line of the address, etc.
How to Add an Individual without a Membership

Always search for an individual before you add them to your NAMI State Organization’s or NAMI Affiliate’s data. This will prevent the creation of duplicate records and will help keep your data clean. After you have searched for the individual if they are not listed you can create a new record.

To add an individual who is not a member:
1. Click “Add Individual” on the left-hand navigation
2. Complete the personal Information form
3. Click the “Save” button in the bottom right-hand corner

This will bring you to the newly created individual’s profile page, similar to the one shown below.

How to Add Information or Edit Existing Information on an Individual’s Profile

To add new contact information to an individual’s profile clicking one of the blue, underlined links located next to each profile section that read, for example, “Add New Address,” “Add New Phone Number,” or “Add New Email.”

For example, to add a new address:
1. Click the link that reads “Add New Address.” This will open a new window, like the one shown below.
2. Enter the new address information.

3. Once you have added the new address, click “Save” in the bottom, right-hand corner of the window.

The new address will appear under the “Addresses” heading on the individual’s profile. You can add any new contact information, such as phone numbers and email addresses, by following these same steps.

To edit or delete contact information,

1. Click the small pencil icon, 🖋, next to the contact information that you wish to change. This will open a new window, like the one shown below.
2. Edit or delete the information you wish to change.

3. “Save” in the bottom, right-hand corner. The changes will be visible on the individual’s profile.

To delete the information, click “Delete” in the bottom, right-hand corner. This will delete this information completely from the individual’s profile.
How to Add or Edit an Individual’s Demographics

To add demographic information to an individual’s profile, click the pencil icon under the “Demographics” section of the profile. This will open a new window, like the one shown below, where you can add or edit demographic information.

You will notice a checkbox in the top right side of the box that reads “deceased?” If a member of your NAMI Affiliate passes away, check this box and then email memberservices@nami.org to let us know so we can drop their membership.

All demographic information is optional.

Once you have finished adding or editing the individual’s demographics click “Save” in the bottom, right-hand corner to save the changes and additions you made.

How to Add a Related Individual
To relate two individual’s records in the database, click the blue, underlined link beside the “Related Individuals” section of the profile that says “Add New Related Individual.” This will open a new window, like the one shown below, where you can add the relationship.

Choose how these two individuals are related such as spouse, child, coworker, or friend. Then choose the person they are related to by typing their last name into the “with:” field. Once you have entered their last name a list of individuals in the database with that last name will appear, as shown below.

Select the name of the individual you want to relate. Once the form is complete, click the “Save” button in the bottom right-hand corner of the window and the new relationship will appear under the “Related Individuals” heading on the individual’s profile.

NOTE: You can only relate individuals who are already in the database. If want to relate someone to an individual who is not in the database, you will have to create a record for the individual first and then relate the two individuals in the database.

How to Add a Subscription to an Individual’s Record
To add a subscription to an e-newsletter that the individual will receive to their primary email address click “Add Subscription” next to the “Subscriptions” section of the profile. This will open a new window, like the one shown below, where you can add the subscription.
Select the e-newsletter from the drop down menu that you want the individual to receive. If the individual would only like to receive the e-newsletter for a specific amount of time you can enter a start date and end date for when they will start and stop receive the e-newsletter. Once you have completed the form click the “Save” button in the bottom right-hand corner and the new subscription will appear under the “Subscriptions” heading on the individual’s profile.
Manage eBatches

Topics
- How To Create an eBatch
- How To Add a New Member
- How to Add a Membership to an Existing Individual
- How to Renew a Membership
- How to complete the “NAMI Add Individual Wizard | Join/Renew Membership” page
- Withholdings
- How to Close an eBatch and Pay for Your Members
  - If you forgot to check the proper withholding check boxes
  - If a member in your eBatch is listed with the wrong membership package
  - If you need to delete a member from your eBatch

The Manage eBatches page, shown below, allows you to create, edit and delete eBatches. An eBatch is a container that holds memberships you want to add or renew and allows you to pay for them. You must create an eBatch before you begin adding or renewing memberships because without an eBatch you have nowhere to store memberships you are adding or renewing and no way to pay for your memberships.

You’ll notice that there are a number of open and closed eBatches already listed in the example image shown below. An open eBatch has not been paid for meaning the memberships in it have not been processed or updated. A closed eBatch has been paid for meaning the memberships in it have been processed and updated.

Open eBatches have a red “X” next to them and can be deleted by clicking the red “X.” You can also edit open eBatches by clicking the blue, underlined number next to the eBatch you want to edit.

Closed eBatches cannot be edited or deleted. You can tell they are closed because the “Closed Date” column has been populated with the date the batch was closed and paid for.
How to Create an eBatch
To create an eBatch click the blue, underlined “Create eBatch” link located near the top of the screen below the heading “List-eBatches.” This will take you to a new screen, like the one shown below, where you can add an eBatch description. It’s important to add a description so you will be able to find the eBatch later when you want to add memberships to it.

Once you have added a description, click the “Save” button. This will bring you back to the Manage eBatches page where you will see your newly created batch at the top of the list of eBatches.

Once you have created an eBatch, you can begin adding new or renewing members that you wish to pay for to the eBatch.

Please note: Your eBatches cannot be more than 50 members. If you put more than 50 members in an eBatch, it will time out and your payment will not go through.

How to Add a New Member
Always search for a member before you add them to your NAMI State Organization’s or NAMI Affiliate’s data. This will prevent the creation of duplicate records and will help keep your data clean. After you have searched for the member, if they are not listed, then you can create a new record.

To add a new member, click “Add Individual” on the left-hand navigation, complete the personal Information form and then click the “Save & Add Membership” button in the bottom right-hand corner to add a membership for the new individual. This will bring you to the “NAMI Add Individual Wizard | Join/Renew Membership” page which is explained later in the “How to complete the ‘NAMI Add Individual Wizard | Join/Renew Membership’ page” section.

How to Add a Membership to an Existing Individual
To add a membership to an existing individual, click “Search-Query” and search for the individual in your data. Once the person appears in your search results, click the blue, underlined ID number next to their name. This will bring you to their Individual Profile page, similar to the one shown below.
Under the “Memberships” section of the profile, there is a link that says “Add New Membership.” Click this link if this profile does not have a current membership on it and you will be brought to the “NAMI Add Individual Wizard | Join/Renew Membership” page which is explained later in the “How to complete the ‘NAMI Add Individual Wizard | Join/Renew Membership’ page” section.

**How to Renew a Membership**

To renew a membership that has expired or that a member wants to renew early, click “Search-Query” and search for the individual in your data. Once the person appears in your search results, click the blue, underlined ID number next to their name. This will bring you to their Individual Profile page.

On the member’s profile on the right next to their membership information, there is a “Renew” link. Please use this link if you are renewing a membership.

**How to complete the “NAMI Add Individual Wizard | Join/Renew Membership” Page**

To add a membership to an individual you need to complete the “NAMI Add Individual Wizard | Join/Renew Membership” page as shown below.
First, choose the NAMI Affiliate the member is joining from the “Affiliate:” drop down menu. If you are logged in as a NAMI State Organization leader, the drop down menu will list all NAMI Affiliates in your state. If you are logged in as a NAMI Affiliate leader, the drop down menu will only show your NAMI Affiliate.

Next, choose the membership type that applies to the member you are adding from the “Membership” drop down menu. In accordance with our Standardized Dues, NAMI offers two membership types for individuals: Regular, which is $35 and Open Door, which is $3.

Next, enter the date this member joined or renewed in the “Join/Renew Date” field. If you are adding a new member or renewing a membership that has already expired, you can put any date equal to or later than the date you are entering the membership as the join/renew date. If you are renewing a member whose membership has not expired you will not be able to change the join/renew date. It will automatically be populated with their existing expiration date.

NAMI 360 automatically calculates the expiration date to be one year after the join/renew date.

Next, choose if you want to withhold any portion of the membership dues. Withholdings are covered in more detail in the next section.

Lastly, choose which eBatch you want this membership to be added to. If you did not add a description to your eBatch it will not appear in this drop down menu.

**Withholdings**

The withholdings check boxes allow you to choose which portions of the membership dues your NAMI State Organization or NAMI Affiliate will use NAMI 360 to pay.

Each NAMI State Organization has told NAMI how the membership dues will be split between their office and the NAMI Affiliates in their state. The splits vary, however an example of these dues splits is shown below:

Regular $35
NAMI: $10
State: $10
Affiliate: $15
Open Door
NAMI: $1
State: $1
Affiliate: $1

By leaving both check boxes empty, as shown below, you will pay the full $35 or $3 membership fee.

Withhold Local: ☐
Withhold State: ☐

NAMI 360 will send the affiliate dues to the NAMI Affiliate the member joined, the state dues to the NAMI State Organization, and the NAMI dues to NAMI.

However, if you are an Affiliate leader who is paying for members who have joined your NAMI Affiliate, you do not need to pay the NAMI Affiliate dues because you do not need to pay yourself. So, you would check “Withhold Local,” as shown below, to withhold (or keep) your portion of the dues from your dues payment.

Withhold Local: ☑
Withhold State: ☐

NAMI 360 will send the state portion of the dues to your NAMI State Organization and the NAMI portion of the dues to NAMI.

If you are a state leader who is paying for members who have joined NAMI Affiliates in your state, you do not need to pay the NAMI State Organization dues because you do not need to pay yourself. So you would check “Withhold State,” as shown below, to withhold (or keep) the state portion of the dues from your dues payment.

Withhold Local: ☐
Withhold State: ☑

NAMI 360 will send the affiliate portion of the dues to each NAMI Affiliate you added or renewed a member for and the NAMI portion of the dues to NAMI.

If you only want to pay the NAMI portion of the dues, you can check both boxes, as shown below, and pay only the $10 for Regular members and $1 for Open Door members.

Withhold Local: ☑
Withhold State: ☑

Once you have finished filling out the “NAMI Add Individual Wizard | Join/Renew Membership” page, click the “Add/Renew Membership” button.

This will bring you to the eBatch profile, similar to the screen displayed below.
How to Close an eBatch and Pay for Your Members

Once you have added all the new or renewing members to your eBatch you can pay for and process their membership by closing the eBatch.

Before you close an eBatch, make sure you have the correct withholding check boxes selected, all the members have the correct membership packages, and the eBatch total is correct.

If you forgot to check the proper withholding check boxes you can check them all at once by selecting the appropriate box located at the top of the withholding column. This will check every corresponding box in the column. Be sure to click the “Save Changes” button located on the left-hand side at the bottom of the eBatch so that your changes are reflected in the eBatch total.

If a member in your eBatch is listed with the wrong membership package you can change it from the eBatch profile screen by clicking the member’s membership package. A drop down menu will appear, as shown below, that will allow you to choose the correct membership package. Once you have changed the membership package, be sure to click the “Save Changes” button so that your eBatch total reflects the change you made.
If you need to delete a member from your eBatch, select the check box next to the name of the individual you wish to remove from the eBatch. Then click the “Remove from Batch” button. This will remove the individual from your batch and update your eBatch total automatically. If you remove an individual from an eBatch their membership will not be updated or paid for.

If you want to delete an eBatch, click the “Delete Batch” button in the upper, right-hand corner of the screen.

Once you have doubled checked your eBatch for errors, you can close and pay for your membership by clicking the “Close Batch” button in the upper, right-hand corner. This will bring you to the “NAMI Close eBatch | Invoice Review” page. Click the “Continue” button at the bottom of the page which will bring you to the “NAMI Close eBatch | Payment” page, shown below.

You can only pay for memberships in NAMI 360 with a credit or debit card. This can be a credit or debit card in a NAMI State Organization or NAMI Affiliate’s name or it can be an individual’s credit or debit card. NAMI 360 does not accept checks as payment.

Once you choose a card type from the “payment method:” drop down menu the rest of the payment form will appear, as shown below.
Complete each bolded item (cardholder’s name, credit card number, expiration date, and CVV). It is not necessary to complete the address and email portion of the form. If you would like to receive a confirmation e-mail of your purchase and send emails to the members in your eBatch that their membership has been updated, leave the “Send Email Confirmation?” box checked.

Once you have completed the form, click the “Submit” button in the bottom, right-hand corner of the screen. The submit button will be greyed out and will read “Please Wait...” as the system processes your payment.

This step may take some time because the system is first validating your payment method and then applying the payment to each record you are updating.

Do not click the back button on your browser or navigate away from this page until the payment has been completed. You will know the payment is complete and that the eBatch has been processed when the “NAMI Close eBatch | Confirmation” page appears, as shown below. Click the “Done” button to finish the close eBatch process. This will bring you back to the NAMI 360 home page.
Generate Reports

Topics

- How to Generate a Membership Summary Report
- How To Generate a NAMI Membership Detail Report (PDF or Excel)
- How to Create Avery 5160 Labels
- How to Generate the Monthly Distribution Reports
- How to turn Search-Query results into an Excel report

The NAMI 360 – Reports page, shown below, allows you to run reports on your NAMI State Organization or NAMI Affiliate’s data. If you are a NAMI State Organization leader, you can run reports on your entire state’s data or on particular NAMI Affiliates’ data in your state.

NAMI 360 currently offers four reports that were created specifically with the needs of NAMI State Organizations and NAMI Affiliates in mind. They include:

- NAMI Membership Summary Report,
- NAMI Membership Detail Report (PDF) and
- NAMI Membership Detail Report (Excel)
- NAMI Membership Detail Report (5160 Labels)
**How to Generate a Membership Summary Report**
The membership summary report provides a quick snapshot of the membership counts for your NAMI State Organization or NAMI Affiliate.

If you are a NAMI State Organization leader, first choose if you want to run the report for your entire state or for a specific Affiliate in your state by choosing an option from the “Affiliate” drop down menu. If you are a NAMI Affiliate leader, you can only run reports on your Affiliate’s data.

Next, select “NAMI Membership Summary Report” from the “Report” drop down menu.

Lastly, choose the format for your report from the drop down menu that reads “Default.” You can leave it in the default format or choose a specific format that you might find more useful. Once you have completed each field, click the “Run Report” button to view your report.

The report, similar to the example shown below, will display the date and time you generated the report, the name of the NAMI State Organization or NAMI Affiliate whose data the report displays, and a chart showing the number of Regular and Open Door members as well as the number of active, lapsed, and dropped members.

![Membership Summary Report Example](image)

**How to Generate a NAMI Membership Detail Report (PDF or Excel)**
The membership detail report provides detailed information on your NAMI State Organization or NAMI Affiliate’s members including personal information and membership information. You can generate a PDF report or a Microsoft Excel report. The Excel report is useful if you need to be able to manipulate the data for example, to create a mail merge or labels.

If you are a NAMI State Organization leader, first choose if you want to run the report for your entire state or for a specific Affiliate in your state by choosing an option from the “Affiliate” drop down menu. If you are a NAMI Affiliate leader, you can only run reports on your Affiliate’s data.

Next, select “NAMI Membership Detail Report (PDF)” or “NAMI Membership Detail Report (Excel)” from the “Report:” drop down menu. Because these reports already have set formats (PDF or Excel), leave the report format as “Default.” Once you have completed each field click the “Run Report” button. This will open a new window, shown below, that allows you to narrow your report parameters.
If you are a NAMI State Organization leader you can choose to run the report on your entire state or on a single or multiple NAMI Affiliates in your state by selecting one or more options from the “Affiliate” field. To select multiple NAMI Affiliates, hold the Ctrl button down on your computer while selecting each NAMI Affiliate.

The report can display results for all members or only those who are active, lapsed or dropped by selecting one or more options from the “Member Status” field. To select multiple statuses hold the Ctrl button down on your computer while selecting each status.

The report can also display results for all members or only those with a certain membership source. The membership sources included “Affiliate,” which means a state or Affiliate leader added them to NAMI 360; “NAMI,” which means an employee at the NAMI office added them to the database or “Online” which means the member joined through the NAMI website.

Lastly, the report can display results for all members or only those with specific join dates or specific expiration dates. You can enter a range of dates or a specific date.

Once you have completed the report parameters, click the “Go” button to view your report. The report, similar to the example shown below, will display the name of the NAMI State Organization or NAMI Affiliate whose data the report displays, the report parameters you chose, a chart showing the membership counts for your NAMI Affiliate, the date and time you generated the report, followed by each member (that fits your parameters), their personal information and membership information.
How to Create Avery 5160 Labels
On the “Generate Reports” page, choose the “NAMI Membership Detail Report (5160 Labels)” option in the “Reports” drop down menu. From the pop up menu, shown below, choose the parameters of the group of people you want to send the mailing to and hit “Go.”

A PDF document that you can print on Avery 5160 label sheets will open that looks similar to the one below (information has been blurred for security purposes).
How to Generate the Monthly Distribution Reports

The Monthly Distribution Reports are enhancements of the Monthly Distribution spreadsheets formerly emailed to NAMI State Organizations and NAMI Affiliates each month, detailing monies paid out to NAMI State Organizations and NAMI Affiliates for Online Memberships, Memberships processed through NAMI 360, and Split Donations. For an explanation of each report, please see the chart below. This can also be found on the “Generate Reports” page in NAMI 360.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Intended For</th>
<th>Data Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAMI State Organization Summary</td>
<td>NAMI State Organizations</td>
<td>Summary of Membership and Split Donation payments for the NAMI State Organization and all of its NAMI Affiliates. Report does not return data when run as a NAMI Affiliate.</td>
</tr>
<tr>
<td>NAMI State Organization Summary - NAMI Affiliates with Bank</td>
<td>NAMI State Organizations</td>
<td>Summary of Membership and Split Donation payments for the NAMI State Organization’s NAMI Affiliates that have Bank Information in NAMI 360. Report only returns data for current NAMI Affiliate when run as a NAMI Affiliate.</td>
</tr>
<tr>
<td>NAMI State Organization Summary - NAMI Affiliates without Bank</td>
<td>NAMI State Organizations</td>
<td>Summary of Membership and Split Donation payments for the NAMI State Organization’s NAMI Affiliates that do not have Bank Information in NAMI 360. Report only returns data for current NAMI Affiliate when run as a NAMI Affiliate.</td>
</tr>
<tr>
<td>NAMI Affiliate Summary</td>
<td>NAMI Affiliates</td>
<td>Summary of Membership and Split Donation payments for the NAMI Affiliate. Report only returns data for current NAMI Affiliate (not NAMI State Organizations).</td>
</tr>
<tr>
<td>Online Memberships</td>
<td>NAMI State Organizations, NAMI Affiliates</td>
<td>All Online Memberships for the NAMI State Organization or the NAMI Affiliates. NAMI Affiliates cannot see full NAMI State Organization data.</td>
</tr>
<tr>
<td>Chapter Memberships</td>
<td>NAMI State Organizations, NAMI Affiliates</td>
<td>All Memberships processed via NAMI 360 for the NAMI State Organization or the NAMI Affiliates. NAMI Affiliates cannot see full NAMI State Organization data.</td>
</tr>
<tr>
<td>Split Donations</td>
<td>NAMI State Organizations, NAMI Affiliates</td>
<td>All Split Donations for the NAMI State Organization or the NAMI Affiliates. NAMI Affiliates cannot see full NAMI State Organization data.</td>
</tr>
</tbody>
</table>
The Monthly Distribution reports’ default file type is html so it will open in your internet browser. You can change the file type to PDF or Excel by choosing those options on the drop down next to the “Reports” drop down.

Once you choose the Monthly Distribution report you want to run and hit “Run Report,” you will need to choose the month the report should be for as shown below. Hit “Go” to run the report for that month.

How to Turn Search-Query Results into an Excel Report
You can turn any search results on the Search-Query page into an Excel spreadsheet report. This can be useful because you can create report with very specific parameters. Click “Search-Query” on the left-hand navigation. Once you are on the Search-Query page enter your search criteria and click the “Search” button in the bottom, right-hand corner. When the search results appear a new button will also appear next to the “Search” button that reads “Export To CSV” as shown below.

Click the “Export To CSV” button. This will open a dialogue box that is different depending on your browser but you should choose to open the file and then click “OK.” This will open an Excel file containing the same information that your search yielded.
State/Affiliate Profile

Topics

• How To Edit your NAMI State Organization or NAMI Affiliate’s Contact Information
  o Selecting different contact information that is already associated with your NAMI State Organization or NAMI Affiliate’s record from a drop down menu
  o Adding new contact information
  o Editing existing contact information
  o Entering information into free-form fields
  o How to Select Sender for Renewal Notices

NAMI 360 allows NAMI State Organization and NAMI Affiliates to maintain their contact information that appears on the NAMI website on the “Find Your Local NAMI” page.

How to Edit your NAMI State Organization or NAMI Affiliate’s Contact Information
To edit your NAMI State Organization or NAMI Affiliate’s contact information click the “State/Affiliate Profile” link on the left-hand navigation. This will bring you to the “NAMI 360 - View State/Affiliate Profile” page, as shown below.

This page will show your NAMI State Organization or NAMI Affiliate’s contact information as it currently appears on the “Find Your Local NAMI” page of the NAMI website (www.NAMI.org). If any of that information needs to be changed, click the blue, underlined “Edit Information” link located on the bottom, left-hand side of the screen. That will bring you to the “NAMI 360 - Edit State/Affiliate” page, similar to the page shown below.
You can edit your NAMI State Organization or NAMI Affiliate’s contact information by:

- **Selecting different contact information that is already associated with your NAMI State Organization or NAMI Affiliate’s record from a drop down menu.** Your NAMI State Organization or NAMI Affiliate may have multiple addresses, phone numbers, etc. associated with it. If this is the case, it will be listed in the drop down menu for each piece of contact information. To change your NAMI State Organization or NAMI Affiliate’s address to another address that is already in the system, click the blue arrow next to the contact information you want to change. A drop down menu will appear from which you can choose a different address. You can use this same method to change the phone number, fax, email, etc.

- **Adding new contact information.** If you want to add a new piece of contact information, such as a new address, click the symbol next to the address field. A separate window will appear where you can enter a new address, shown below.
Once you have finished entering a new address, click save, and this address will be added to the drop down menu.

- **Editing existing contact information.** If contact information that is already in a drop down menu is inaccurate you can edit it by clicking the pencil icon next to it. This will open a new window similar to the one shown below, where you can edit any information that is inaccurate.

  ![Edit - Chapter Address](https://nami360.nami.org/netForumNAMITEST/ servlet/DynamicEditModal.aspx?modal=Yes&FormField=3151045c-5203-4e44-8047-8511)

  Once you have made any necessary updates click the “Save” button located in the bottom, right-hand corner. You can also delete the address from the drop down menu by clicking the “Delete” button.

- **Entering information into free-form fields.** The “Website” and “Geographical Service Area” fields are free-form, meaning you can type information in instead of selecting it from a drop-down menu. The Geographical Service Area is a new field that allows you to let prospective members know if your NAMI Affiliate serves the area they live in. For example, if your NAMI Affiliate is NAMI Example County but you serve more than just Example County, you can list the additional areas you serve, such as Example City and Example Town.

  To choose what information appears on the “Find Your Local NAMI” page on the NAMI website, use the “Display _____ on web?” check boxes beside each piece of information.

  Once you have made all necessary edits to your NAMI State Organization or NAMI Affiliate’s contact information, click the “Save” button in the bottom, right-hand corner of the “NAMI 360 - Edit State/Affiliate” page. This will save the changes you made which will then be reflected on the NAMI website on the “Find Your Local NAMI” page.

- **How to Select Sender for Renewal Notices.** The last line of the Affiliate profile is “Renewal Notices Sent By”. Your Affiliate can choose if you want NAMI to send a series of renewal notices via email only to your members when their expiration dates approach. NAMI will not mail renewal notices – they will only be emails. You can also choose to continue sending them through the Affiliate office by choosing “Affiliate.” If you choose “State”, you will need to arrange that directly with the NAMI State organization.
State/Affiliate Leaders

Topics

- How to Add a New NAMI State Organization or NAMI Affiliate Leader
- How to Edit an Existing NAMI State Organization or NAMI Affiliate Leader
- How to Remove an Existing NAMI State Organization or NAMI Affiliate Leader

The State/Affiliate Leader page, similar to the page shown below, allows you to add new NAMI State Organization or NAMI Affiliate leaders, edit existing leader information including contact information, whether a leader receives email notifications, and whether a leader appears on the NAMI website; and remove leaders after they resign or leave their positions.

How to Add a New NAMI State Organization or NAMI Affiliate Leader

To add a new leader to your NAMI State Organization or NAMI Affiliate, use the blue “Add Leader” link at the top left-hand side of the page. A new box to add the leader will pop up, as shown below.

If you are a NAMI State Organization leader, you can use the “Affiliate” drop down menu to choose either your NAMI State Organization or any of your NAMI Affiliates to add a new leader to. If you are a NAMI Affiliate leader, you can only add new leaders to your NAMI Affiliate.
In the “Leader” field, begin typing the name of the leader you want to add. A list of matching names will appear and you can choose the correct record. Please note that you can only add leaders who already have a record in the system. If the new leader does not have a record, you will need to create one before adding them as a leader.

In the “Position” drop-down box, choose the best option to describe the new leader’s role at your organization.

You can enter a date in the “Start Date” field but it is optional.

If you would like this new leader to appear on the “Find Your Local NAMI” section of the NAMI website, choose the “Show on web?” check box. If not, leave it blank. If you would like this new leader to receive automatic email updates from the system (such as when a member adds or renews online, due payments are sent or a member updates their information), choose the “Email Update?” checkbox. If not, leave it blank. Hit “Save” to add the new leader.

**How to Edit an Existing NAMI State Organization or NAMI Affiliate Leader**

From the “State Affiliate Leaders” page, you can edit a leader’s contact information or status by clicking the blue “Edit Leader Role and Contact Information” link beneath the leader you want to edit. You will be taken to the “Edit State/Affiliate Leader” page as shown below.

You can choose alternate information saved in the system by using the drop downs; edit the displayed information by clicking the ; or adding new information by clicking the . These buttons function the same way here as in the “State/Affiliate Profile” section.

To remove an existing NAMI State Organization or NAMI Affiliate leader, you can enter an “End Date.” This will remove them from the NAMI State or Affiliate leader list but will not alter their membership record.
NAMI 360 Help

You can use the red “NAMI 360 Help” link on the left-hand side to access the NAMI 360 Help Site, shown below. This site will open in a new browser window. It includes previous training videos, downloadable instructions and updates.

NAMI 360 Suggestions

NAMI wants to hear from you about what we can do to make NAMI 360 to best possible tool for you to use. Use the red “NAMI 360 Suggestions” link on the left-hand side to be taken to our “Suggestions” site. Here, you can send NAMI suggestions on would make the system easier to use or more useful to you. You can also see what other people have suggested and how NAMI has responded to their suggestions.

Additional Resources

Please contact memberservices@nami.org with any data or membership related questions or to report system errors.