



Database 102

DATABASE

Access at Department Level

ATLAS



Database 102

ATLAS

Web address: atlasams.com

Username: email address

Password: your password

Headquarters must manually set up each Atlas user.



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ATLAS is the back-end part of the database. Be cautious of what is edited in this area.

Departments can view anyone in the League as it is not restricted to State. It is asked that you not edit those outside responsibility.

WebLink is now **Atlas**
by MemberClicks

Sign In to Atlas

Email

NEXT

See a demo of
Atlas, a MemberClicks Product

If you do not have an account, please contact your System Administrator.



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ATLAS access is provided to Department Commandant and Department Paymaster. Additionally, the Board of Trustees and National Headquarters have access.

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Once logged in, a menu bar will load.

From here, you can search profiles, created/edit events, and run reports.

| Dashboard Profiles▼ Events▼ Revenue▼ Reports Communication▼ Admin▼ | | |
|--|---------------------------------------|-----|
| Upcoming Events | | |
| | Date | Att |
| Central Division Conference | 4/2/2020 9:00 AM - 4/4/2020 10:00 PM | |
| Midwest Division Spring Conference | 4/17/2020 8:30 AM - 4/18/2020 5:00 PM | |
| Department of Kansas Conference | 6/6/2020 8:00 AM - 4:00 PM | |



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PROFILES

Select “Profiles” to bring up a search bar.

Note, it is best to enter Last Name, First Name For detachment search, start with using the number.

Search for a profile name or ID...

Select Profiles

waid, e

- Profile Info
- Billing
- Member Activity
- Affiliation Codes
- Categories
- Events
- Related Profiles

Profile Info

Select...



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Once inside a Detachment's page, a variety of information is available including a list of members. Click on each member to get to their profile.

Profile Edit

General Information

Membership Information

Additional Addresses

Additional Phones

Additional Emails

Listings

Social Media

Affiliation Codes

Billing

Web Portal Credentials

Custom Fields

Delete Profile



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EVENTS

At the main menu, click on Events to View and Create Events.

Please include Department and Detachment MCL Events, Conventions, etc.

8/26/2020

The screenshot shows the 'Events' page in the Marine Corps League database. The navigation bar includes: Dashboard, Profiles, Events, Revenue, Reports, Communication, and Admin. A search bar is present with the text 'Search events...'. Below the search bar, there are filters for dates (02/25/2020 to 02/25/2021), a dropdown menu, and checkboxes for Organization, Community, Members Only, and Internal. There is also a checkbox for 'View All with Pending Registrations'. A search button and an 'Export Search Results' link are visible. A pagination control shows page 1 of 1. The main content area displays three event cards:

| Event Name | Count |
|------------------------------------|-------|
| Central Division Conference | 4 |
| Midwest Division Spring Conference | 2 |
| Department of Kansas Conference | 3 |

Each event card includes the following details:

- Event Name and Count
- Date Range (e.g., 4/2/2020 9:00 AM - 4/4/2020 10:00 PM)
- Status Filter (O, C, M, I)
- Total Attendees: 0
- Pending Registrations: 0
- Total Invoiced: \$0.00

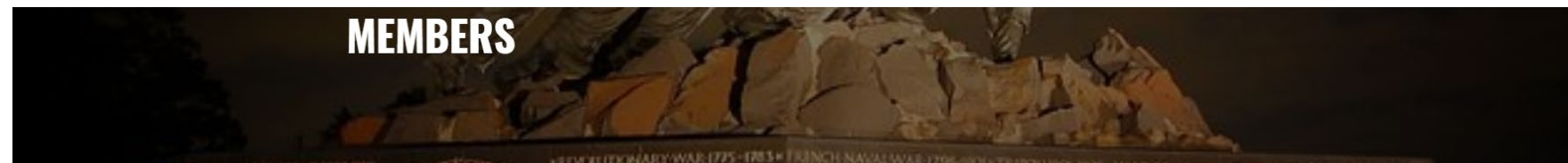


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Events are visible on the Events Calendar
in the MCL
Library for
everyone
to see.

Go to

www.mcleaguelibrary.org



EVENTS

VIEW THE DATE OF:

APRIL 2020

MONTH WEEK LIST

TODAY < >

MM/DD/YYYY

FILTER BY EVENT TYPE

OTHER

FILTER BY CALENDAR TYPE

ORGANIZATION

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-------------------------------------|--|-----|
| 29 | 30 | 31 | 1 | 2 9a Central Division Conference | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 8:30a Midwest Division Spring Conference | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |



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REPORTS

If you click on “Reports”
from the main menu
it will bring up a column
of options.

Select “Run a Report”

Then select “Custom Reports”

The screenshot shows a web application interface. At the top, there is a navigation bar with 'Reports' and 'Communication' tabs. Below this is a dropdown menu with three options: 'Run a Report', 'Run a Saved Query', and 'Manage Custom Reports'. A yellow arrow points from the text 'Select “Run a Report”' to the 'Run a Report' option. Below the dropdown is a main navigation bar with 'Dashboard', 'Profiles', 'Events', 'Revenue', and 'Reports' tabs. The 'Reports' tab is active, displaying a 'Reports' section with a list of report categories: Profile Reports, Member Reports, Event Reports, Sales Opportunities, Exception Reports, and Custom Reports. A yellow arrow points from the text 'Then select “Custom Reports”' to the 'Custom Reports' option.



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The Roster report continues to take shape.

It is called “Detachment Summary.”

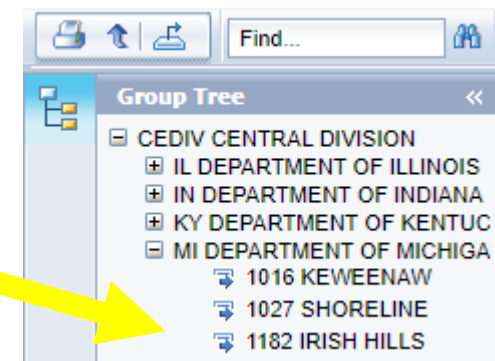
The Departments will be able to generate their own roster report and distribute to detachments.

The screenshot shows a web application interface with a blue navigation bar at the top containing the following menu items: Dashboard, Profiles, Events, Revenue, and Reports. Below the navigation bar is a section titled "Reports" in a large, bold font. Underneath "Reports" is a list of report categories, each preceded by a plus sign icon: Profile Reports, Member Reports, Referral Reports, Contact Reports, Task Reports, Event Reports, Committee Reports, Revenue Reports, Sales Opportunities, Web Reports, Exception Reports, Admin Reports, and Custom Reports. The "Custom Reports" category is expanded, showing a list of specific report files: DataReview_Implementation_Summary.rpt, DataReview_Parent_Record_List.rpt, DataReview_Profile_Snapshot.rpt, Deceased Report Without Taps Date.rpt, Detachment Dues.rpt, and Detachment Summary.rpt. A yellow arrow points from the text in the slide to the "Detachment Summary.rpt" report file.



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The Detachment Summary will open a menu so Division, Department, then Detachment can be selected. It will open a Detachment Roster. Note: If you see a person listed twice, it is because they have an additional relationship to the detachment – such as Paymaster.



As of: 08/25/2020 **Marine Corps League**

Division: CEDIV CENTRAL DIVISION Department: MI DEPARTMENT OF MICHIGAN Detachment: 155 FLINT

Active Member Detachment: 155 FLINT 162

| Profile ID | Member | Address | City | State | Zip | MemberID | Life Join Date | Mbr Since | Active Member |
|------------|--------|---------|------|-------|-----|----------|----------------|-----------|---------------|
|------------|--------|---------|------|-------|-----|----------|----------------|-----------|---------------|



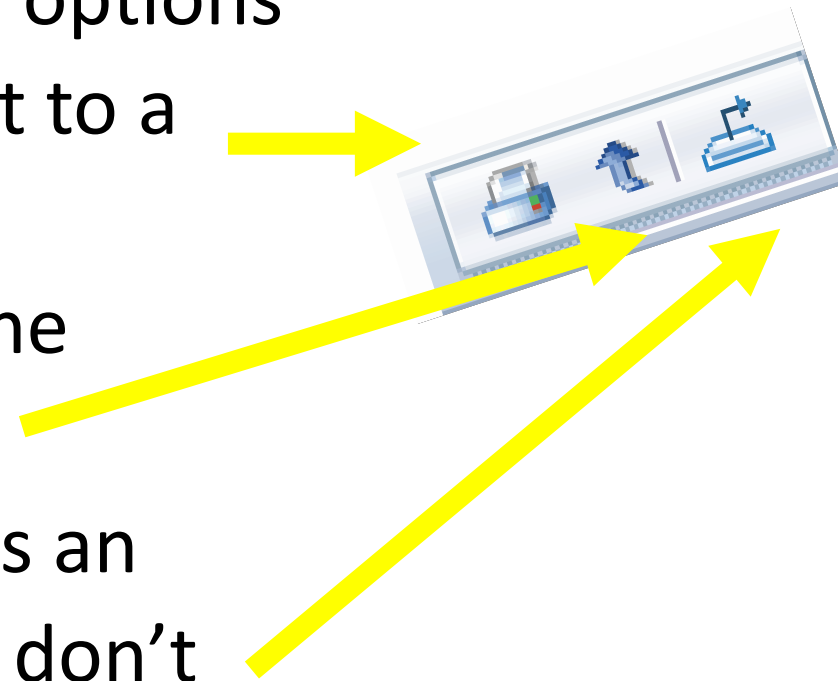
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At the top left is a small menu of options

Click the **printer** button to export to a PDF file.

Click the **up arrow** to return to the previous menu.

Click the (right) **ICON** to export as an **Excel** workbook. Note, the fields don't line up on the Excel Export.





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FUTURE

Note that the new database does have the ability to process payments electronically if we set it up.

This is a platform that can help make our transmittal process electronic in the future.

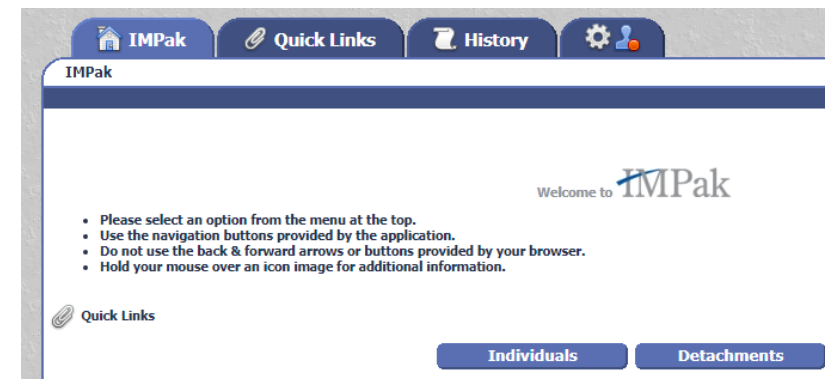
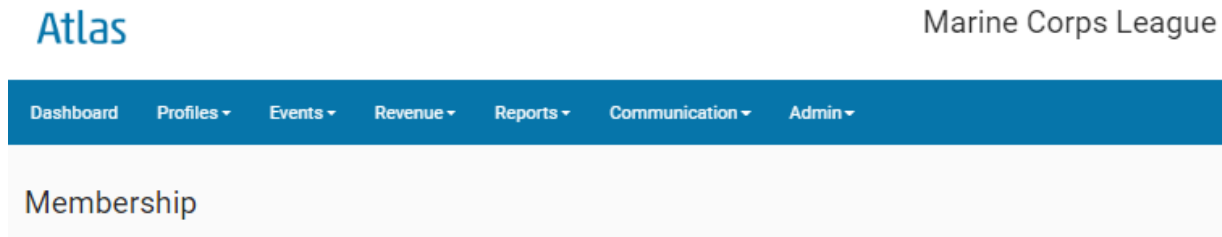
The screenshot displays the Atlas software interface. At the top, there is a navigation bar with the following items: Dashboard, Profiles, Events, Revenue (highlighted in orange), Reports, Communication, and Admin. Below the navigation bar is a search bar with the placeholder text "Search profile names or invoice numbers...". A dropdown menu is open under the Revenue menu, listing the following options: Select Invoices, Pricing Calculations, Generate Invoices, and Apply Payments. Below the search bar, there is a section for "Invoice Info" with sub-sections for Aging, Revenue Item, and Payment Info. A button labeled "+ Add Search Field" is visible. At the bottom, there is an "Actions" dropdown menu and a table with columns for Invoice Number, Report Name, and Revenue Item.



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Presently, our headquarters membership staff are utilizing the old and new databases simultaneously and will do so for a year or more as we transition.

Procedures are being documented for our current and future employees to use the database.





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Points of Contact

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Bob Borka – COO

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