

Step by Step Instructions for On-Line Membership Reporting (OMR)

1. If you did not receive the email sent via Zimbra, please contact Stacy, your OMR representative. Her contact information is below. She will be able to supply you with your individual logon and password. If you have your logon and password, go to step 2.
2. Visit the OMR website: www.pf-omr.org
3. To add an event, click on "Add An Event" button, lower right
4. On this page, select your event and include the date of the event, review your event and click "Save"
 - a. NOTE: if you choose "Banquet" as your event you must add 0 to the "Regular Meal price" and "Additional Ticket Meal Price"
5. Click the "Registered" button on the appropriate open Event line
6. Now we need to add attendees to the event we just created
7. In the 'Register Members' tab, click on a letter to pull a list of chapter members by their last name
8. Click the check box under "Register" column next to the name of your banquet attendee
 - b. Under "Add to Event" column choose the appropriate member level. By default, the ASSOCIATE membership level is selected unless the member is an existing LIFE, PATRON or YOUTH
 - c. Address updates may be done here or after you have registered your member in 'Registered Attendees' tab
 - d. Comments may be added in the 'Registered Attendees' tab after the member is registered (i.e. you noticed a duplicate member listing, name correction, if a member has complained about not getting the Journal, etc.)
9. Once you have all your names checked for the alpha letter you are working on, click on the next alpha letter. You will be prompted to click save. You may also click on the button "Add Selected Members to Event"
10. **IF no match was found**, Click "Add Person" button to search for new members or names not found on the alpha list
11. Search by last name, then first initial, partial first name or complete first name for an individual. If a company, search by typing in the full or partial company name
 - e. **Do not hit enter when typing in a name for searching.** If enter is pushed, use the back button on your browser to return to the previous page
 - f. Highlight the name you were searching for, select the appropriate member level then click "Add Selected Record to Event" button
 - g. For New members (name not found in search), click "Create New Record" fill out the form with the new member's information, select the appropriate member level, click "Add Record"
*** **Do not use CAPS. Use lower or proper case only*****
12. You can then search for your next member
13. When all attendees have been added (or you need a break from entering members), you can return to the event roster by clicking the "Return to the Event Listing"
14. Verify that the totals on the event are correct. You may review your registered attendees by clicking "Registration" or "View Roster" buttons
15. If you are satisfied with your event roster and are ready to submit to national, return to the list of events and click on the "View Report" button. This will bring up your "Web Event Membership Report"
 - a. Verify all data on the form and check for accuracy as this is the dollar amount PF National will be deducting from your Cash Management Account (CMS)
16. If approve, click on the "Submit" button. Click "Cancel" if the numbers are incorrect and return to the roster or the 'Registered Attendee' tab to view members
17. The "Web Event Membership Report" will automatically be sent by email to the chapter Treasurer. Print a copy of the report for your records. **NOTHING needs to be sent to the National office**, the funds will be automatically withdrawn from your Cash Management Account
18. Click "Log Off" button to exit OMR. (At this time you may get an error message. Just close out of your internet server)

Tips and Tricks

- If a PF chapter sells a QF membership (or vice-versa), please contact Stacy to get the QF membership levels added to your event
- Contact Stacy Behlivan with any questions. (877) 773-2070 (toll free), (651) 209-4948 (direct) or by email at sbehlivan@pheasantsforever.org.