



NETFORUM ENTERPRISE FACT SHEET FOR CHAPTERS

Since 2012, the Texas Society of Certified Public Accountants (TXCPA) has used the NetForum Enterprise AMS platform for operations. TXCPA makes this software platform available to chapters to:

- Increase operating efficiencies, reduce redundancies and reduce costs
- Improve the member experience and retention
- Ensure the accuracy and security of member data
- Fully leverage the investments we are making in technology

Currently, 13 TXCPA chapters use the NetForum platform for chapter operations. Use of a centralized database provides numerous benefits to chapters and members.

SINGLE SIGN ON (SSO)

Members expect a simple and user-friendly experience when interfacing with the Society. Single sign on eliminates confusion for the member and the need to have two separate log ins to two separate systems.

MEMBER UPDATES

In order to provide the best service, we need to ensure we have up-to-date information. By having all updates posted in the same central system, we eliminate the need for reconciliation of records on a periodic basis.

TRAINING

TXCPA invests in annual training and makes this training available to all chapters that operate on the platform.

EASY REPORTING

TXCPA has developed queries and reports that are available for all users of the Society's NetForum platform. Having access to these readily available options will make it easy and seamless to pull data from the system as needed.

COST SAVINGS

Centralizing the database ensures we are operating on the most up-to-date platform and not paying to operate and maintain separate systems.

COMPREHENSIVE CPE TRANSCRIPT

Members will be able to see all of the CPE they have taken from both the state and the chapter in one location to make tracking and reporting easier. When a member has a question about their transcript, both state and chapter staff can view the information and are better prepared to assist the member.

SEPARATION OF FINANCIAL ACCOUNTS

All event income collected by the chapter goes directly to the chapter's bank account if they maintain a separate merchant account. Each chapter operates as a separate business unit on the platform. With programming, NetForum has the ability to interface with most major accounting software packages.

MEMBER ENGAGEMENT DATA

In order to best serve our members, it is important to have a full view of their engagement in the Society at both the state and chapter levels. By centralizing data, we have a better understanding of a member's full experience in the association in order to best respond to their needs and report on member usage of programs and services.

SYSTEM SUPPORT

TXCPA staff is available as a resource to assist with reports, queries, event set up questions, etc.

READY TO DISCUSS OPTIONS FOR YOUR CHAPTER?

CONTACT BRYAN GARZA AT BGARZA@TSCPA.NET OR 800-428-0272, EXT. 255

How long does it take to transfer a chapter's operations to NetForum?

The time required for the transfer of chapter data to the NetForum platform depends upon the amount of data being transferred. We recommend that a chapter only transfer relevant historical data needed for immediate operations, rather than an entire backlog of data. The prior three years of transactions should suffice. Additional history could be transferred at a later date if desired. It is recommended that the chapter plan for four to six months for the data transfer, integration and to be fully operational on the new system.

How much chapter staff time will it take?

Strong communication between chapter and TXCPA staff will be the most critical piece for a successful integration. Chapter staff should plan on brief weekly progress meetings with TXCPA staff during data transfer, plus an additional two days for in-depth training.

What is the cost to the chapter to operate on the NetForum platform?

All direct costs associated with the transfer of data and maintenance of the NetForum usage license will be covered by TXCPA. The only costs assumed by a chapter would be those associated with staff time spent on progress meetings and training, as well as any travel costs associated with attending training sessions. Depending on the requirements for the chapter website, some direct costs would apply.

How will chapter staff be trained?

In-person training is recommended to allow for more personalized assistance. Chapter staff are invited to attend training with TXCPA staff in their Dallas headquarters. If time and budget limitations exist, virtual training options will be available. Training will occur at launch and annual training will be available to help chapter staff expand their NetForum knowledge.

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