HOW IT WORKS
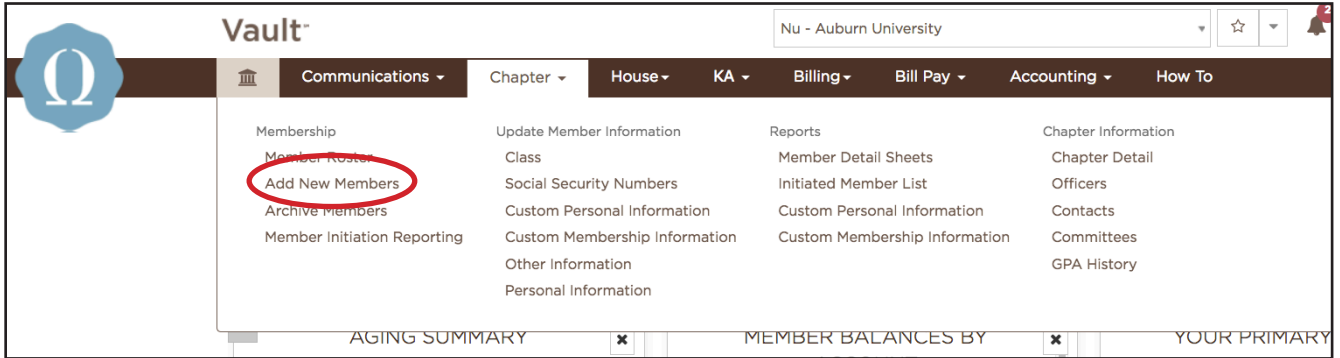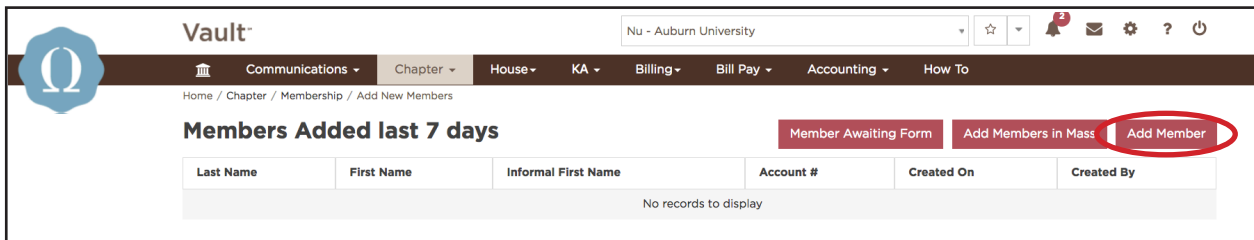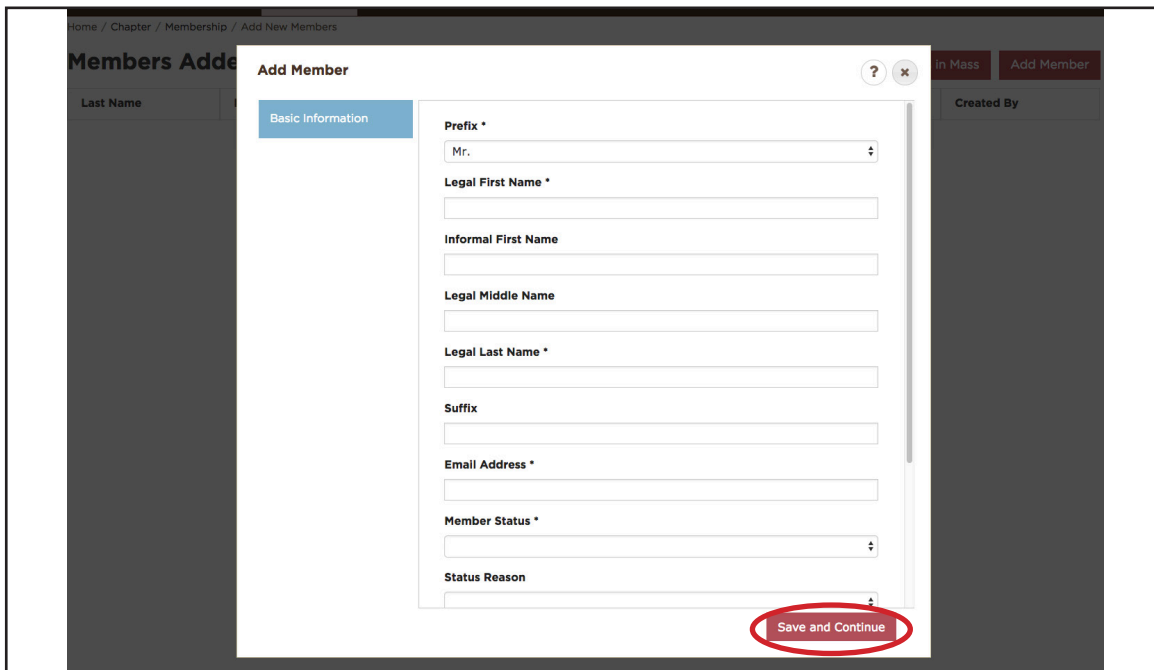
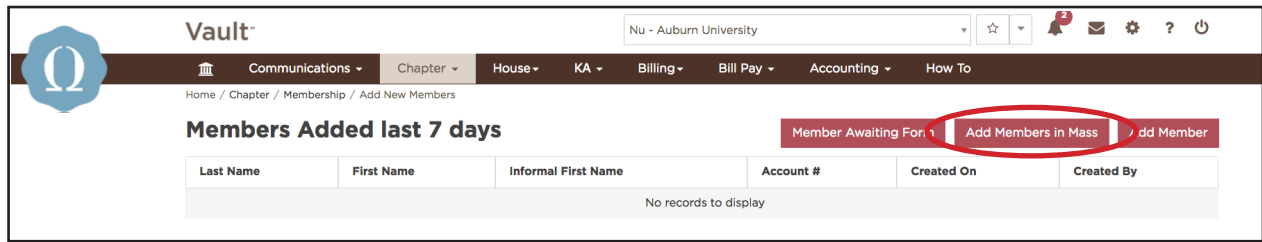Add new members via Vault > Chapter> Add New Members

1. Select 'Add Member' to add an individual member to the roster

**2.** All basic information with an asterisk beside it will need to be complete before selecting 'Save and Continue'

For more information or with questions, contact your OmegaFi Representative at 800.276.6342.

3. To add a group of members at once, select 'Add Members in Mass'

4. Select 'Download Template' to view the Excel template and enter each members' basic information. Once complete select 'Browse' to choose the document, then 'Upload' to pull the information into the roster.
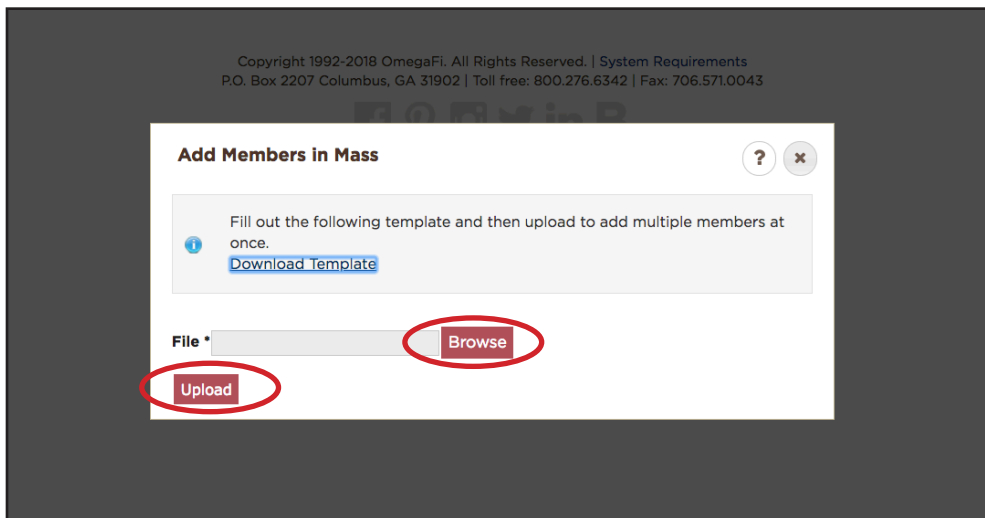
5. Once the template is uploaded, you will see the Mass Member Edit page. From here, you will need to select the appropriate billing group for each new member.

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