



## Membership 2018-2019

Summer Leadership Academy  
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## MemberHub – Getting Started

**Objectives**

- First Time Login
- Managing Multiple Units
- Profile

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## First Time Login

- Visit [memberhub.com/login](http://memberhub.com/login)
- Enter email address and choose “I need to create a password”
- Enter first name and last name
- Email will be sent to your inbox for confirmation – click the link in that email
- Create a password
- If you are the first person to log in you will be asked to update your school’s MemberHub New Subdomain address
  - Example: HamburgPTSA.MemberHub.com
- Presidents, Vice Presidents, Treasurers, Secretaries, and Membership Chairs should all have admin permissions

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**Managing Multiple Units**

- If you have joined more than one unit with the same email address, you can easily switch between them in MemberHub
- Find your name in the upper right corner and click it
- See all units are listed under Switch Organizations

The screenshot shows the MemberHub interface for 'Empire State PTSA'. In the top right corner, a user's name is visible. A dropdown menu is open, showing options like 'Your Profile', 'Your Family', 'Your Account', 'Email Address', 'Change Password', 'Email Settings', 'Personal Election Time (IEE & Credits)', 'Switch Organizations', 'Empire State PTSA', and 'My PTSA Log'. The 'Switch Organizations' option is circled in red.

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**Profile - Edit**

- Find your name in the upper right corner and click it
- Click Your Profile
- Click Edit Profile to update the following:
  - Picture
  - Name/Display Name/Maiden Name
  - Birthday
  - Gender
  - Email
  - Phone Numbers
  - Mailing Address
  - Bio
  - Calendar Options

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**Profile - Custom Fields**

- Each unit has the ability to add custom fields
- Click on Admin Console, then Settings tab
- On Organization Settings select Custom Fields then Add Field
- This field will be editable through the Profile

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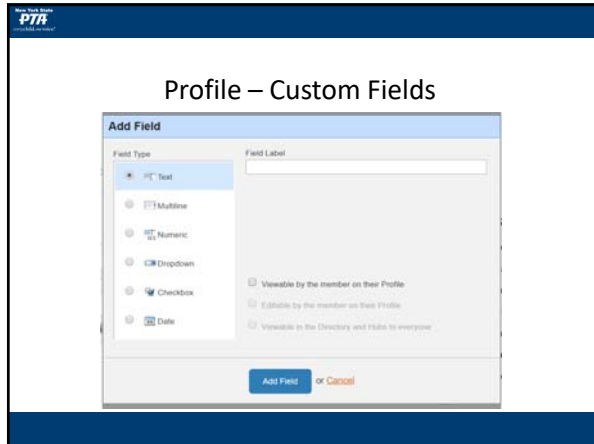
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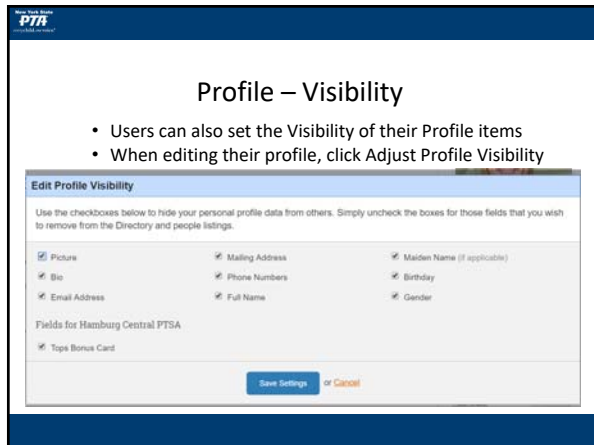
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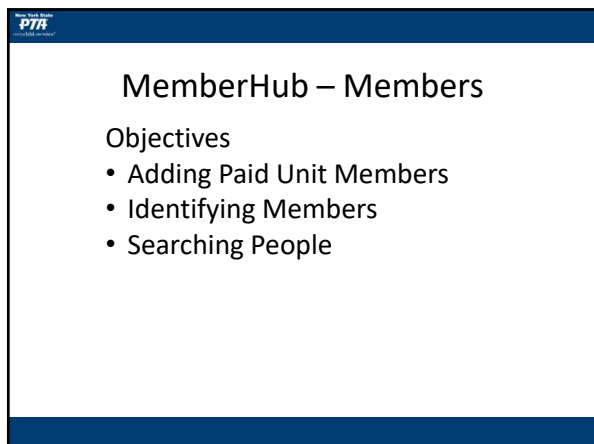
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**PTA**  
MemberHub

### Adding Paid Members

- Members can join a unit in one of two ways
  - Use the MemberHub Store
  - Pay Unit
- To enter a Paid Member into MemberHub, click Admin Console > PTSA > Members
- Complete the Member information and click the Add Member button
- Entered members will be listed at the bottom of the page as they are added

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### Identifying Current Members

- All members from the 2017-2018 year were uploaded automatically into MemberHub
- MemberHub triggers off the email address or phone number
- Duplicate emails will not be allowed
- Whether a person is already in the system or not, when they join there will be a Yellow Star indicating they are a current member
- There is an option on the right of the people list to filter by PTA Membership

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### Searching People

- Anyone with an email address or phone number can be entered into the system
- They do not need to be PTA members to have access to MemberHub
- Both members and people will show up in the People list
- Communication, use of Hubs, texts, etc. can all be used for both members and non-members through MemberHub
- There is a search option that allows filtering by name

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**Searching People**

- Admin Console > People

Misc TESTING Unit Admin Console

Showing 1 thru 6 of 6 People

0 people selected. Select all

Filter by Status

- Not in any hubs (0)
- Has email address but no login/password (0)
- Email locked (0)
- PTA Members (6)

Manage Tools

Add Person

Print Directory

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**MemberHub – Features**

Objectives

- Dashboard
- Membership e-card
- State Payment

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**Dashboard**

- Admin Console > PTA > Dashboard

Empire State PTSA Admin Console

Dashboard

13 Members | \$130.00 Paid Online | \$0.00 in Cash/Check | \$130.00 Total

Membership by Month

PTSA Pages

- Dashboard
- Officers
- List Data
- Members
- System Information
- State Payments

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**Membership e-card**

- Members can access their membership cards through MemberHub
- Click their name in the upper right corner and go to Your Profile
- On the right hand side under the profile picture and list of family members, there is an image of the card and a link to the 2018-2019 PTA Membership Card




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**State Payment**

- Payments to the state for Memberships will now be done via MemberHub
- Order placed through the store will automatically be deposited into the Unit's account
- Payment to state will withdraw from that same account

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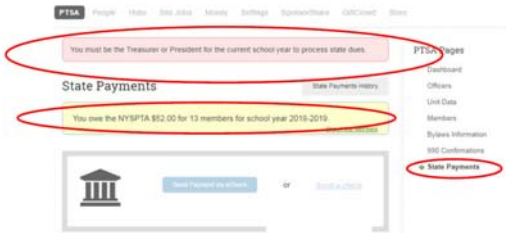
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**State Payment**

- Admin Console > PTA > State Payments

Empire State PTSA Admin Console




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## MemberHub – Store

Objectives

- Selling Memberships
- Settings
- Custom/Bundles Membership
- Categories
- Orders

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## Selling Membership

- NOTE: WePay account must be set up before the MemberHub store will be activated
- Link will be <Unit>.MemberHub.Store, where <Unit> is the New Subdomain entered on first login
- All membership types and prices will be uploaded from the Unit by-laws
- All memberships are automatically available on the store unless it is hidden
- Custom fields can be added for members to complete upon purchase, however these are not automatically transferred into MemberHub profile/hubs

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## Settings

- Units have the option to cover the processing fees or pass them on to the member
- This setting is sitewide, if they are covered for membership, they will be covered for all items sold on the site
- Store permissions are set independent of MemberHub permissions
- Only Store administrators can manage the store
- President will be assigned as Store administrator by default

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### Custom/Bundles Membership

- Memberships can be combined with additional memberships or additional items – remember that the price of the memberships must remain the same
  - Examples - \$10 Standard and \$5 Additional Family
    - Family of 4 membership - \$25
    - Membership + \$5 Donation - \$15
    - Membership + Free Gift - \$10

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### Categories

- Memberships are automatically listed under a Membership category
- Categories can be added for additional items in the store
  - Examples
    - Donations – create a \$1 donation and people can add the quantity they would like to donate
    - Apparel/Spiritwear
    - Yearbooks
    - Fundraisers

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### Orders

- All orders are displayed on the Orders tab of the Store Admin
- Clicking the order number will display the details of the purchase
- Any custom fields are visible here

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## MemberHub – Resources

Objectives

- Contact Information
- Websites
- Questions

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## Contact Information

Ken Keenan  
Western Region Membership Chair  
membership@westernregionpta.org

Candy Ditekowski Western Region Director  
regiondirector@westernregionpta.org

Kelly Short  
NYS Membership Chair  
membership@nyspta.org

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## Websites

**Western Region PTA Membership**  
<http://www.westernregionpta.org/membership.html>

**New York State PTA Membership**  
<https://nyspta.org/home/membership/>

**MemberHub Support**  
<https://Support.MemberHub.com>

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**Need a Helping Hand?**

	Self-Starter	Quick Start	Turnkey	Just do it for me!
Online support resources	✓	✓	✓	✓
Scheduled webinars	✓	✓	✓	✓
Custom Site Configuration		✓	✓	✓
Hub Creation		✓	✓	✓
People Uploaded - Custom Import		✓	✓	✓
Membership / School Store Set Up			✓	✓
Custom Newsletter Template			✓	✓
Fundraiser/Event Creations				✓
(2) 60-min Individualized online video training sessions				✓
Pricing	FREE	\$99	\$249	\$499 Best Value

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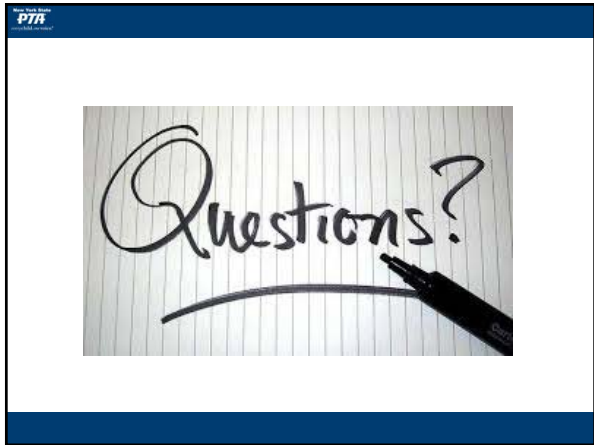
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