



MemberHub

Unit

Training Manual

Table of Contents

Welcome to MemberHub	Page 3
Officer Registration for 2021-2022 With Florida PTA	Page 4
First-Time Login / Creating Your MemberHub account	Page 5 - 7
First -Time Login	Page 5
Activate Site & Set Domain Name.....	Page 7
Assigning Access Rights	Page 9 - 14
Remove an Administrator	Page 9
Adding an Administrator	Page 10 - 14
Add / Update Officers	Page 15
Adding People to MemberHub Account	Page 16 - 20
Adding People Individually	Page 16
Importing a Contact List	Page 17
Set-up a Site Joins Page	Page 18
Cash/Check Membership Payments	Page 20
Setting up MemberHub Store	Page 21
Credit/Debit Card Membership Payments	Page 21
Adding Membership Types to Your Store.....	Page 23
Adding Items and Donation Option to Your Store.....	Page 25
How to Void/Edit a Transaction & PTA Membership	Page 26
Printing and Emailing Membership Cards	Page 26
Submitting Membership Dues to Florida PTA (e-check)	Page 28

Welcome to MemberHub

Florida PTA has recently partnered with MemberHub, a free online tool, designed to help PTAs with recordkeeping and the administration of your unit, council, or district. MemberHub software is designed to make it easier to run the PTA – engaging families, raising funds, and staying in “good standing.”

Units will be able to manage everything including tracking and paying membership dues, filing compliance paperwork, setting up a PTA store, creating newsletters, sending emails to PTA members, managing volunteer signups, and more.

MemberHub is be required for all local unit PTAs regarding FLPTA compliance (payment of membership dues to Florida/National, audits, 990s, and officers). The other tools provided by MemberHub are not required at this time, however you may find them beneficial. That is up to you and your PTA.

MemberHub never sells membership lists or shares personally identifiable information with any outside party. State PTA needs member data to report to National PTA and to communicate directly with PTA members. MemberHub does not communicate directly with members.

Additional information is available on the MemberHub website: www.memberhub.com

I. Officer Registration with Florida PTA

Once your PTA has elected its 2021-2022 officers, an officer, usually the President, will need to **first complete the FLPTA “New or Returning Officers Form” on the FLPTA website** (direct link: <https://floridapta.org/new-or-returning-officers-form/>).

Once completed, the officer will receive an email with a link to MemberHub. The officer will need to set-up the unit/council, a generic domain/url, and register unit/council officers.

When completing the online registration with FLPTA, you will need to have the following information:

- PTA Unit Information:
 - PTA Name (as noted on Bylaws)
 - National PTA Unit # (add zeros at the beginning to = 8 digits)
 - Federal EIN # (9 digits, no dashes)
- School Information:
 - Name of school, address, city, zip, county, phone (without dashes)
 - Principal’s name and email
 - Type of school (elementary, middle, etc.)
- Certify read information about audit and the annual 990 tax filing
- Officer Information:
 - Name
 - **Home** address
 - Phone number
 - **Personal email address** – IRS requires personal contact information (address, phone, email, etc.) for officers of 501(c)3 organizations. PTAs using general mailboxes (e.g. ABCElemPTA@gmail.com) will be able to use those in MemberHub as well (refer to pg. 8)
- Date of election meeting
- Name and email of person completing the registration

After completion of the form, FLPTA will send an email confirmation of the form submission. (Note: If you do not receive an email confirmation, the form was not completed properly. You will need to resubmit the information).

FLPTA will also send an email, to the Unit President, with MemberHub login information. The officer receiving the email is responsible to now create the PTA’s MemberHub account and register the PTA officers in the MemberHub system (refer to page 8).

Florida PTA ‘Kit of Materials’ will be emailed (via Constant Contact) to each registered local unit officer upon receipt of the completed online FLPTA form.

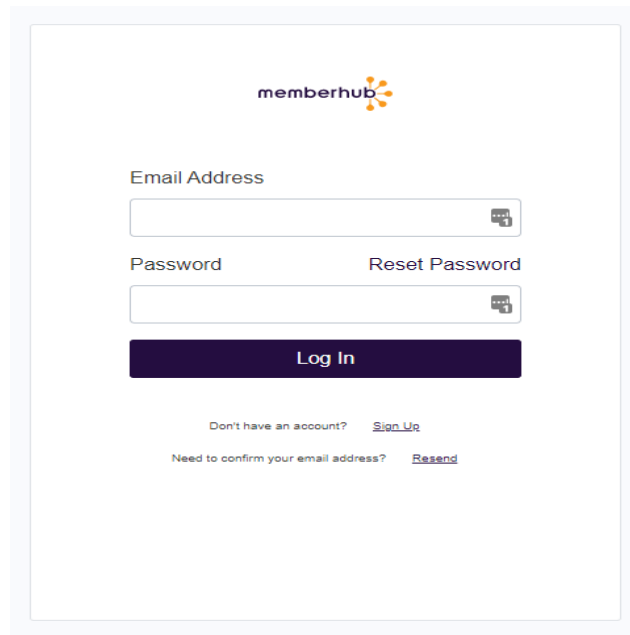
FLPTA DOES NOT PROVIDE OFFICER OR MEMBERSHIP LISTS TO OUTSIDE NON-PTA ENTITIES.

II. First-Time Login / Creating Your MemberHub account:

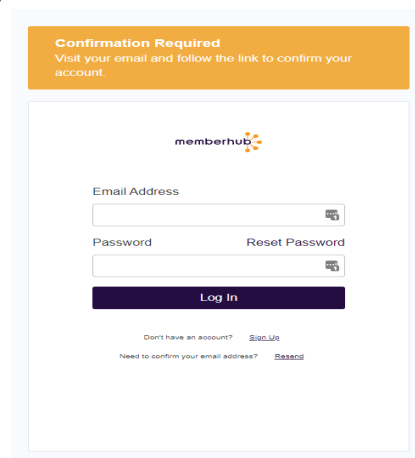
A. First-Time Log-In

I. To access the MemberHub website for the first time, go to: app.memberhub.com/login. and login using the confirmed email address and password for our account.

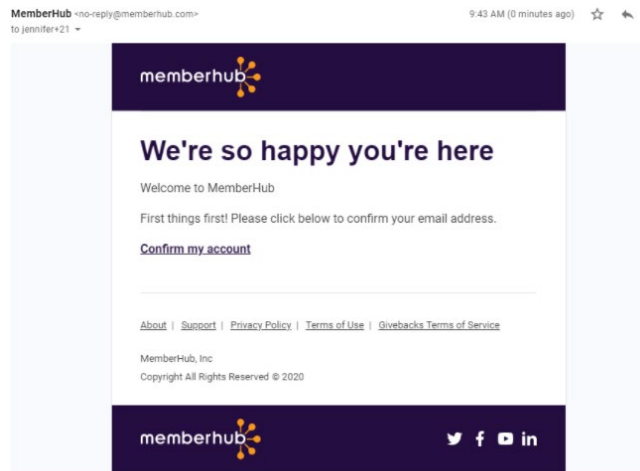
- Enter the email address and password (email recognized by FLPTA)
- Click **SignUp**

The image shows the MemberHub login interface. At the top center is the MemberHub logo, which consists of the word "memberhub" in a sans-serif font followed by a stylized orange icon of four dots connected by lines. Below the logo are two input fields: "Email Address" and "Password". The "Email Address" field is a white box with a light gray border and a small "x" icon on the right. The "Password" field is a white box with a light gray border, a small "x" icon on the right, and a "Reset Password" link in blue text to its right. Below these fields is a dark blue button with the text "Log In" in white. At the bottom of the form, there are two links: "Don't have an account? Sign Up" and "Need to confirm your email address? Resend", both in blue text.

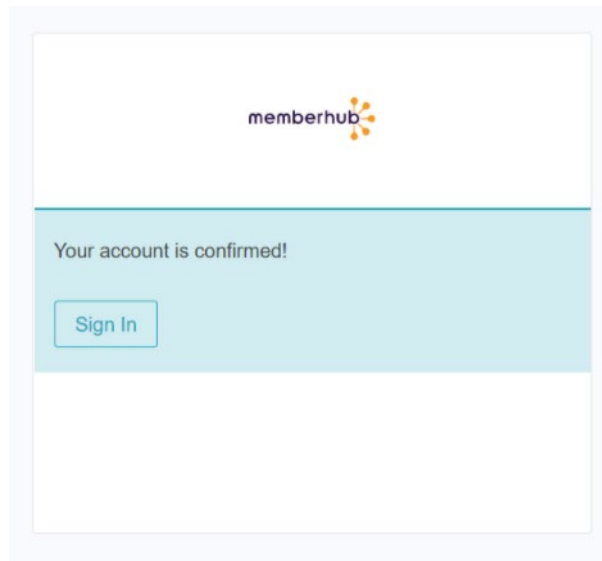
- Enter your name, email address, and create your secure password.
- Click **Sign Up** Button
- You will see this message on your screen and a confirmation email will be sent to confirm your email address.

The image shows a confirmation message from MemberHub. At the top is an orange banner with the text "Confirmation Required" in bold, followed by "Visit your email and follow the link to confirm your account." in a smaller font. Below the banner is the MemberHub login form, which is identical to the one in the previous image, showing the logo, input fields, and buttons.

- Find the confirmation email and click **Confirm My Account**
-



Reply Reply all Forward



B. Activate your site and set the domain name

As “Site Administrator” you are going to set-up your PTA’s site domain / PTA’s MemberHub email address. This is a one-time set-up and is done by the first unit officer with ‘administrator (admin)’ rights.

- Click on **Settings** to view **Organization Settings**

Organization Settings

Organization Details	Change
Site Joins Enabled <small>Provide a link to a public page where people can register themselves and family members to join your MemberHub Site</small>	Change
Organization Logo	Change

Save

- **Organization Details:** Click **Change** to expand the Organization Details section Here you can set your Subdomain, address, and Tax ID. **NOTE:** If you edit your subdomain and still want to access your legacy site, you will need to edit the subdomain in your legacy site as well. .

Organization Settings

Organization DetailsClose

Subdomain

wilestunit

The site address is a custom web address for your organization where people can log on to MemberHub. Changing this address will cause links to the old address in emails or on other websites to break. We recommend that you not change the site address after it is initially configured.

Name

Wisconsin Test Unit

Street Address

1200 Goofy Street

Address 2

City

City

State

WI

Zip

90210

Country

United States

Tax ID (EIN)

12-3456788

Site Joins Enabled

Provide a link to a public page where people can register themselves and family members to join your MemberHub Site

[Change](#)

Organization Logo

[Change](#)

- Enter in a **New Subdomain**. The subdomain should be short and unique to your PTA. (Example “ABCElementary.Memberhub.com”). Recommend not using “PTA” in the name as you may be using the MemberHub site for more things than solely PTA, such as a ‘store.’

Organization Logo

You can upload your Organization logo here. This logo will be used in messages, in your store, and on your website.

III. Assigning Access Rights for Administrators:

Access Rights:

When setting up the officers in MemberHub, the PTA President will determine who will have administrative access. Site admins can manage members and contacts, site settings and access, hubs, state payments & reporting, and the e-store.

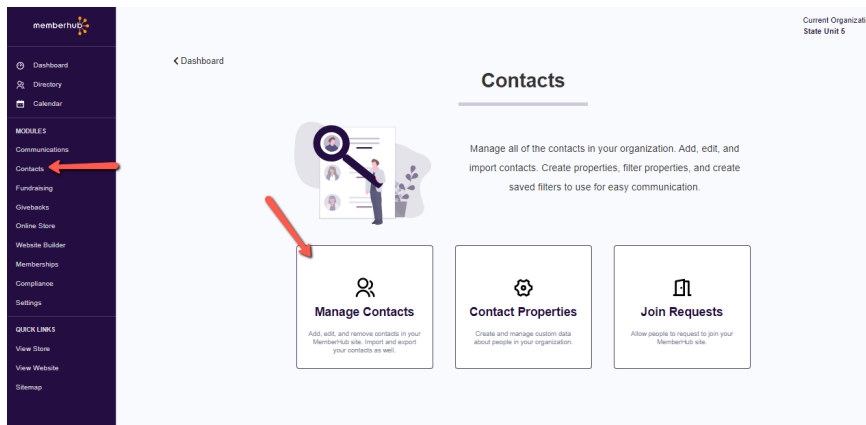
FLPTA assigns PTA Presidents with administrative access. The PTA President assigns access to fellow officers accordingly. Usually the Treasurer is assigned admin rights as well, being s/he is responsible for remitting membership dues, filing the annual report, and 990 (taxes).

Access can be changed at any time.

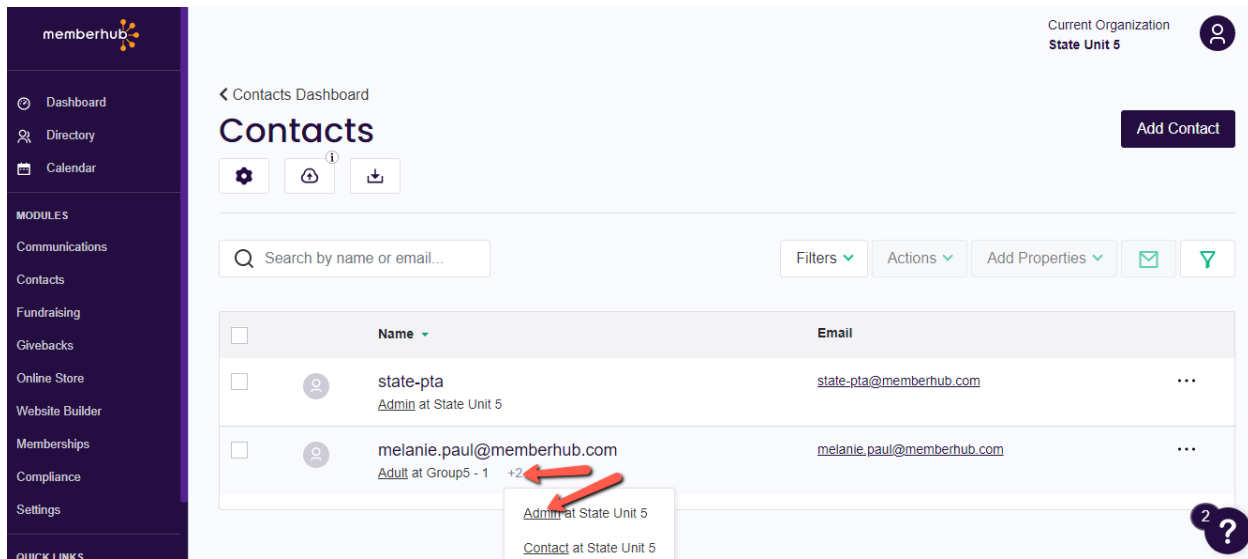
FLPTA will have 'admin rights' on all Florida PTA units, councils and regions.

Remove an Administrator

1. Go to the **Contacts** page and click on the **Manage contacts** button.



2. Once there click on **Role +number** under the person's name, click **admin** on the role where you wish to revoke admin rights.



3. On the pop-up, choose the red remove button. You can also choose to expire if you wish to just expire their admin rights sooner.

View Contact Role

User

Profile

melanie.paul@memberhub.com

Role Name

Admin

Organization Name

State Unit 5

Starting At: 07/01/2020 at 12:00 am

Expires At: 06/30/2021 at 11:59 pm

Remove

Expire

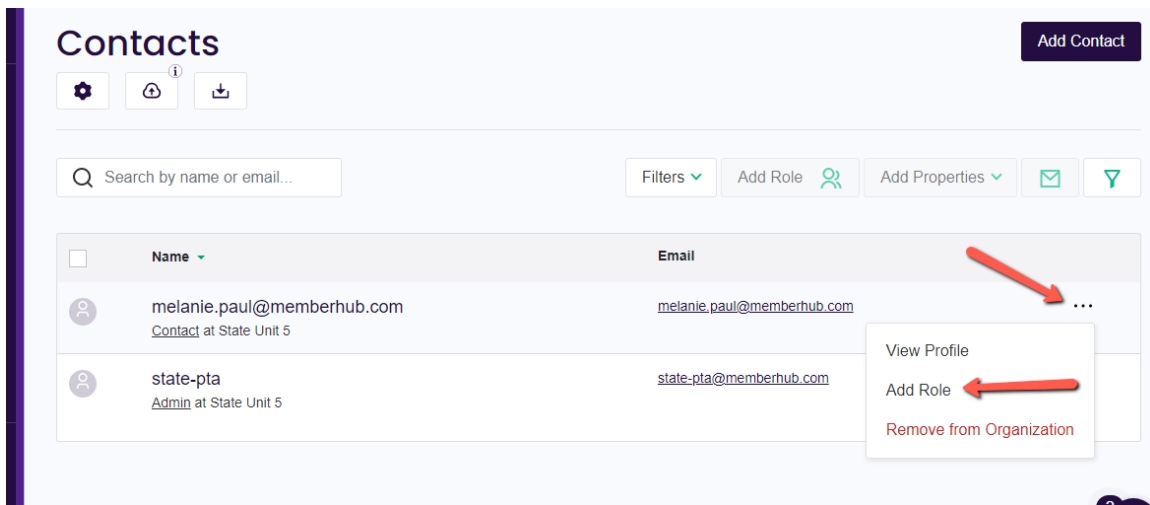
Close

Add an Administrator

There are 2 ways to add admins. One for people already on your contacts page and another for people you need to add to your site.

If the user is already on your site:

1. Please click **Contacts** on the left menu and find the user on your list. Click the 3 dots next to their name > add role.



2. Choose your organization entirely at the top or choose a hub specifically if you want only to give that person admin rights to a specific hub.

3. Choose admin from the Role name drop down box. Be careful to pay attention to the year dropdown as well as to toggle on or off if the role expires at the end of the year (July 1st).

X

Add Role

State Unit 5 [Change](#)

Role Name

Admin ✓

2020 - 2021 ✓

☐ Expire role at year end

Close

Save

4. Choose **Save**.

Alternatively, you may *invite* someone to *become* site admin that has never been on your site before using the instructions below, but they will not officially have site admin access until they accept the invitation email.

1. Please click **Contacts** on the left menu and click **Add Contact** on the top right

The screenshot shows the Memberhub interface. On the left sidebar, under 'MODULES', 'Contacts' is highlighted with a red arrow. At the top right, 'Current Organization: State Unit 5' is displayed, and an 'Add Contact' button is highlighted with a red arrow. The main content area is titled 'Contacts' and contains a table of contacts.

	Name	Email	
	melanie.paul@memberhub.com <small>Contact at State Unit 5</small>	melanie.paul@memberhub.com	...
	state-pta <small>Admin at State Unit 5</small>	state-pta@memberhub.com	...

2. Choose your organization entirely at the top or choose a hub specifically if you want only to give that person admin rights to a specific hub.

3. Fill-in the form that pops up:

- **Role Name:** select **Admin**
- Review year dropdown & to toggle on or off if the role expires at the end of the year (July 1st).
- Enter the **users name, email and phone number**.

- Choose to **Add to family** or **Add a Personalized Message** on your Admin rights email inviting them to join the site.

Add Contact

Adding to 1 organization/hub [Change](#)

Role Name

Contact ✓

☐ Add as Organization Admin

2020 - 2021 ✓ ☒ Expire role at year end

Email Address *

Email Address

First Name * Last Name *

Phone Number

Phone Number

Add to Family ☒

Add this user to either a new Family or an existing one

Add a personalized message ☐

Close Save

3. Click **Save**. The Invitee must **click the link in the invite email** to be activated as an Organization Administrator.

IV. Add / Update Officers:

- 1) Login to the PTA MemberHub site (app.MemberHub.com).
- 2) **Compliance** link (left margin) takes you to **Compliance Module**
- 3) Click on **Officers**
- 4) Select the year first, the **Add Officers**

Compliance Dashboard

Current Organization: State Unit 12

Compliance

Compliance Submissions
Enter your state PTA compliance submissions like Form 990s and Financial Reviews. [View](#)

Officers & Committee Chairs [Close](#)

2020 - 2021 [Add Officer](#)

Name	Office	Address	Email	Phone
gena.ward@memberhub.com	President	1234 Common Way Mobile, AL 36695		

Officer Information

Title *

☐ Add as Organization Admin

2020 - 2021 ☒ Expire role at year end

Email Address *

First Name * Last Name *

Street Address

City

State Zip

AL ☒ Zip

Country

United States ☒

Phone Number

- 5) Select the applicable officer role, enter name, email and other information. If the person is already in MemberHub database, the information may be displayed and you can select. Your State PTA determines what officer roles are listed in this area. If you have officer that is not listed, add them as Other.
- 6) Check the box to **Add as Organization Admin** if you want the officer to have **admin rights** on your site. If not, you can leave this box unchecked.
- 7) Click the **Save** button on the bottom.

Note: After June 30, past year officer information cannot be updated or removed. Prior year officer information should remain in MemberHub for state-level PTA data recordkeeping.

When an officer's term is over, the new officers/admins often leave the old ones on as site admins for a while in case they need training or assistance

IMPORTANT – EMAIL ADDRESSES:

- **You must use personal email addresses for your personal accounts.** The profiles created will stay with the individual as s/he moves from school to school and/or in and out of PTA roles. This applies to MemberHub and all levels of PTA!
- **Never use generic or PTA-owned email addresses to report officers or purchase PTA memberships.** These types of profiles cannot identify an individual and cannot be transferred to new officers.
- **Generic emails (e.g. ABCElemPTA@gmail.com, Volusia.cc@floridapta.org) must be kept separate from anyone's personal profiles.** Add generic emails as a new "Officer" and assign admin rights and/or add to hubs as needed. I use the County Council email address when sending messages on behalf of County Council and/or FLPTA.

Unit Data:

Contains information about your unit.

IRA Status – should be **ok** If says revoked, please contact your County Council President.

Number of Employees: enter correct number here (aligns with an award)

Last Year Insurance Paid:

Bylaws Expiration Date: check to make sure your unit has current bylaws

Submissions

Area to check to see if have submitted your 990 to FLPTA

Documents:

Can add documents for reference and future officers (tax exempt cert, bylaws, 990, etc.)

V: Adding People to Your MemberHub site

There are several ways you can add people to your MemberHub site:

- Add PTA members individually
- Import a list of non-members
- Set-up a “Site Joins” page
- Set-up membership in your school store (see pages 15-17)

IMPORTANT: Adding persons to your site as “People or Contacts” does NOT add or update PTA/PTSA membership records. Refer to page 20-21 for how to enter paid members individually.

Note: County Council Presidents and Region Reps are automatically a member of each local units MemberHub. By being a ‘member,’ you will have easy access to them as any member. Neither County Council President nor Region Rep will have access to change and/or edit your MemberHub site.

Add People individually

- 1) Login to the PTA MemberHub site (app.MemberHub.com)
- 2) Select **Contacts** Link (left)
- 3) On next page, click **Manage Contacts**
 - a. Complete the form
 - b. Choose to add the contact to the organization entirely or just a hub
- 4) Next fill in:
 - a. Choose the contacts role from the drop-down
 - b. Choose if you want their profile to expire
 - c. Enter the email address, first and last name and phone number (phone or email is required for all members, except students)
 - d. Optional: Choose to add the contact to a family
 - e. Optional: Add a note to your email inviting the contact
 - f. Click **Save**

Import a list:

Site admins can upload contact data into their MemberHub sites through the **People Importer**. Once you upload your contact records, MemberHub will create profile records in the **Admin Console**. Then, you can place them into hubs for communication.

- 1) Login to the PTA MemberHub site (app.MemberHub.com)
- 2) Select **Contacts** link (left) > **Manage Contacts**
- 3) Select the import icon

4) Fill in the form

- Download the template and fill this in with your contacts
- Check the box next to both options under number 2.
- Enter your initials
- Add your CSV file
- Click Import on the bottom

Note: Please read Step 1 below before completing the spreadsheet because you must adhere to certain data formats – e.g. you can't add any additional columns with data in the spreadsheet.

Once the import has completed, the results will be emailed to the person who runs the import. If there are any errors in the import before the import starts, you may see an error message with instructions.

If there are any rows with erroneous or invalid data, the import will skip those rows and try to run to completion.

Set-up a “Site Joins” Page:

A **Site Joins Page** is essentially a registration page for your site. Enabling your Site Joins Page allows your PTA to provide a link to a public page where people can register themselves and family members (if applicable) to join your MemberHub site. You and/or other site administrators will then approve or reject the join requests.

Note: *This does not add people as PTA members. Use the MemberHub Store for this function.*

- 1) Login to the PTA MemberHub site (app.MemberHub.com)
- 2) Select **Contacts > Join Requests**
- 3) Click the **Settings** (top left)
- 4) At **Site Joins**, click **Change** (right)
- 5) Click the check box to enable site joins

You may also choose to auto-approve site joins. Please use this option cautiously as it removes the validation step to allow users in your site.

Next, Choose the date range you want your Site Joins page open. **Start** and **End** date are required to make the Site Joins page live. You can also add any descriptions/information you want to appear on the site joins page. Click the **blue save** on the bottom right.

Once you click save, scroll back up a bit. You will see your site join links you can share.

Your code will be generated when you save these settings

Specify a date range to keep your Site Joins Page open and accessible.

Starting At:

Expires At:

Add Additional Content

Type in any additional content, information, or instructions for people requesting to join your site.

Normal **B** **I** U

At this point, you're ready to distribute the web address of your Site Joins Page which is where people will go to request to join your MemberHub site:

- 6) Two (2) options:
 - i. provide the full web address which includes the **Join Request Key**
 - ii. Provide the shorter of the two web addresses that do *not* include the key in the address. This is more secure. Visitors that join that page will be required to type in the **Join Request Key** in order to register.

Processing Site Join Requests

As people submit join requests, administrators are then required to process those requests. The requests will show up on the **Join Requests** tab under **Contacts**.

Administrators can **accept**, **reject**, **hold**, or **edit** each request accordingly. Check the box next to the person and choose accept, reject or hold button.

Join Requests

[Settings](#)

Open Organization + Accept X Reject Hold

<input checked="" type="checkbox"/>	Users	Role	Requested At	Status	
<input checked="" type="checkbox"/>	jennifer@memberhub.com, Jennifer Gospodarek	Parent/Guardian	Organization	05/04/2021 at 2:19 pm	...

- **Accepting** a join request, that person's information will either create a new person and family in the People tab or if a match is found, it will update the existing person's information.

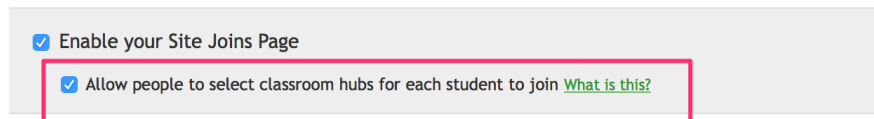
- **Rejecting** the request will flag the request accordingly and any email addresses used in that request will not be available for future join requests until an administrator deletes/clears that request.
- **Holding** a request just puts it into a "hold" state so an administrator can handle it later.
- **Edit** will allow an administrator to actually edit the details of the request before it is ultimately accepted or rejected. To edit, click the 3 dots at the end of the line.

For Schools

An additional checkbox will appear when setting up your Site Joins Page that will allow people to select a classroom hub when they are entering their student's information.

Setup Site Joins Page

Enabling your Site Joins Page allows Five Points Solutions to provide a link to a public page where people can register themselves and family members (if applicable) to join your MemberHub Site. Site Administrators will then approve or reject the requests. **Check the box below to enable this feature.**



☒ Enable your Site Joins Page

☒ Allow people to select classroom hubs for each student to join [What is this?](#)

The idea is to make it easier on administrators so that when the join request is accepted, it will automatically put those students (and parents if chosen) into their appropriate classroom hub!

VI: How To Document Cash/Check Membership Payments in MemberHub

Membership payments can be made via cash, check and credit/debit card (following section). Ideally, you want people to join your PTA using your MemberHub Store so PTA members are automatically added to your MemberHub site and sent a receipt, which includes a link to their membership card and instructions to log in and update their profile. However, if you would like to allow people to pay their dues via cash, check, or other system outside of MemberHub, you will need to manually enter those members.

As always, your Executive Committee will determine whether or not your PTA will take credit/debit cards in addition to cash & checks. If accepting credit/debit cards, the President or Treasurer will need to set-up an 'e-store' / WePay account (refer to page 11).

When entering memberships in **PTA tab > Add Members**, you are placing/confirming a transaction which:


- documents how the member paid
- creates a membership card
- generates an email receipt & yellow star, syncing this with FLPTA

None of these things can happen until the payment is confirmed.

There are no fees from MemberHub for cash or check payments.

To Add A PTA Member - Cash/Check:

- 1) Login to the PTA MemberHub site (**app.MemberHub.com**)
- 2) Select the **Membership** Module click on **Manage Members**
- 3) Click **Add Cash/Check Member**
- 4) Select the Membership that was purchased.
- 5) Enter the payment information for the membership order (Price Paid, Check Number and select the Year)
- 6) Enter membership details for each member (Any required custom fields, Member Name, Email, Phone Number and Member Type). Click **Save**
- 7) If the member has a valid email address, they will receive an emailed receipt with a link to their membership card and instructions to log in and update their profile on your site. There is not currently a way to generate a receipt through MemberHub, other than to send it when entering the person as a member or when purchasing a membership online.
- 8) After adding a member you will automatically be taken back to the list of Members in your site. If you have more members to add, you can click **Add Cash/Check Member** to add another one.
- 9) If you have a large amount of members to enter manually, can import members instead.

Note: If a member does not have a valid email address and would like their membership card, you can open and print it for them by clicking the card icon  next to their name in the Members list or from their [profile](#).

VII: How To Document Credit/Debit Membership Payments in MemberHub

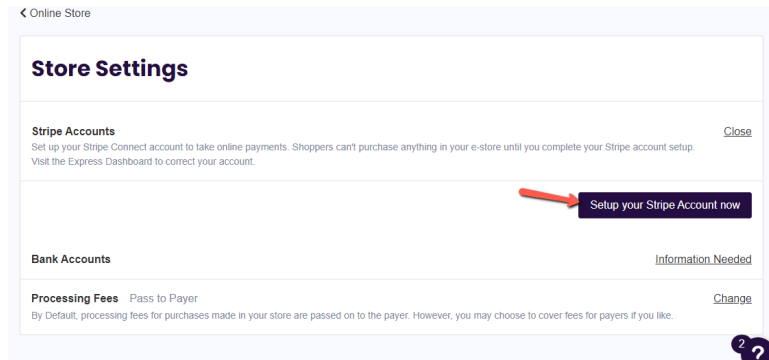
An 'e-store' will need to be set-up to take sell memberships, collect donations, sell spirit wear and more online.

Get setup to take payments online takes a few minutes. You will need your PTAs EIN and bank account info handy and complete online application with Stripe. Once this information is entered online, the details are 'hidden' and are secure.

There are fees associated with credit card transactions. Estimated - payment processing company, and MemberHub charge in total 3.5% + \$0.50 per credit card payment. Ex: On a \$10 membership, the fee is \$0.85. Typical industry fees as much as: 7% plus \$0.50 comparatively. Fees can either be paid by the PTA unit or passed on to the member (Refer to **Store Settings tab** to select who absorbs the fee).

Setting Up Your MemberHub Store:

- 1) Select **Online Store > Store Settings**
- 2) Under **Store Settings**, click the blue **Setup Stripe Account Now**



Follow these steps to complete the form. You'll most likely get instant approval.

1. Enter your **Cell phone number and Email address** and **click next**
2. Enter the **confirmation code** you were texted, and click next.
3. Choose **Non-Profit Organization** under the Type of business and click next. Enter:
 - Legal Business Name as it Matches your EIN
 - EIN
 - DBA
 - Business Address
 - Business Phone Number
 - Choose Membership Organizations > Charities and Social Service Organizations from the Industry type dropdown.
4. Click **Next**
5. Enter your **legal representative's information** (president or treasurer) to include:
 - Representatives First and Last Name
 - Email Address
 - Job Title (Officer Status)
 - Date of Birth
 - Mailing Address
 - Phone Number
 - Last 4 Digits of Social Security number (see below for more info)
6. **Enter Banking Details:**
 - Routing Number
 - Account Number (Must be a checking acct)
 - Or by debit card number
7. **Click Next**
8. **Select Done** on the bottom of the next screen, if all details look correct.

Next, you will be taken back to your MemberHub Store where you can see that your Stripe has been successfully connected.

Please note that while you can create a Stripe account through your MemberHub Store, the terms of the account are determined by Stripe, not MemberHub.

By law, Stripe must ask for your SSN to make sure you are who you say you are, and that you're authorized to act on behalf of an entity (your PTA, organization, or business). Your SSN is for identity verification ONLY; Stripe is federally required to officially know someone connected to the account. Sometimes stripe may ask for your full SSN, other times all that is needed is the last 4 digits. Your information is secure, and MemberHub doesn't access or store it.

Stripe doesn't run credit checks, so inputting your SSN for this purpose won't affect your credit score. Your taxes won't be affected, either, as long as you input the correct name and Employer Identification Number (EIN) for your PTA in Stripe.

When you start the payments application form in MemberHub, you're actually on the Stripe site. MemberHub has no access to your banking data, so we don't store it and your privacy is tightly controlled. Stripe keeps all the information you enter in Stripe safe with bank-level security measures.

VIII: Adding Membership Types to Your MemberHub Store:

Your standard state membership types will already be loaded in the system. Here is where you can change the dollar amounts, add other types of membership options, and 'hide' types not applicable to your unit/school,

- 1) Select **Online Store > Products > Memberships > New Memberships**
- 2) Fill out the **Membership Name, Short Description, Long Description, Number of Members, and the price as well as category.** **Note:** Your membership level price must be greater than the number of potential members that are joined multiplied by the amount due to the state for each member (\$3.50).

Name

Short Description

Long Description

Number of members

Price

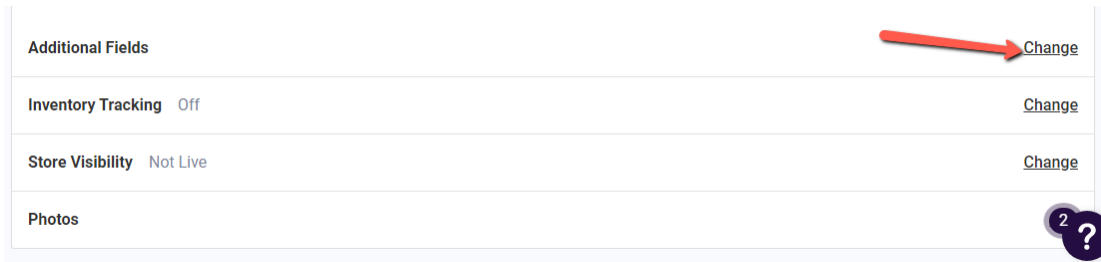
A remittance of \$4.00 is paid to the state for each member

Your membership level price must be greater than or equal to the number of potential members that are joined multiplied by the amount due to the state for each member(\$4.00).

Category

Memberships

Note: The following fields are automatically included when someone purchases a membership online through your site or an administrator manually enters a membership: first name, last name, email address OR a mobile phone number, and member type.



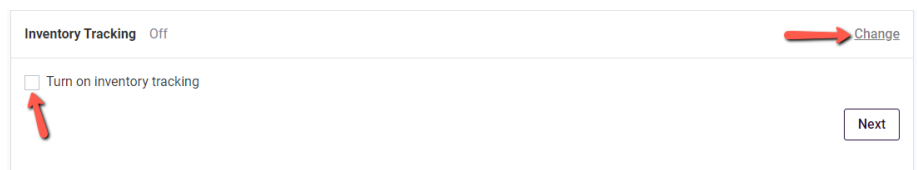
Additional Fields [Change](#)

Inventory Tracking Off [Change](#)

Store Visibility Not Live [Change](#)

Photos [2 ?](#)

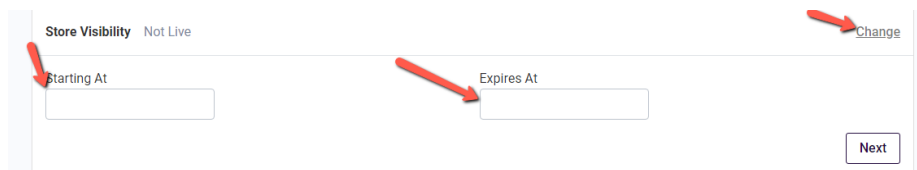
- 3) Add **Additional Fields** by clicking **change**
- 4) Click **Add Custom Option** and fill in the pop-up box and click **Save**.
- 5) To turn on inventory tracking: click **Change** and select **Turn on Inventory Tracking**



Inventory Tracking Off [Change](#)

☐ Turn on inventory tracking [Next](#)

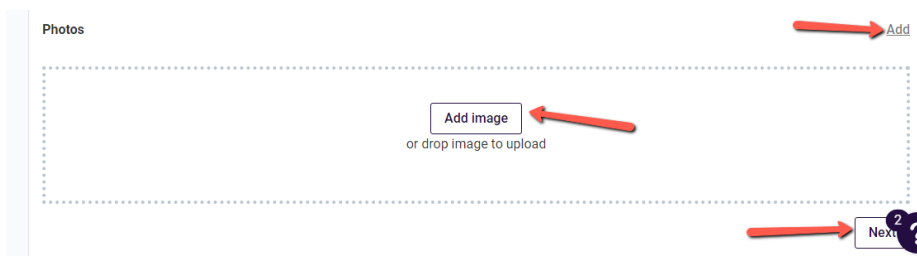
- 6) To give expiration date or make 'live' at a later date, click **Change** and enter dates:



Store Visibility Not Live [Change](#)

[Starting At](#) [Expires At](#) [Next](#)

- 7) Add photos to your membership, click Add, Add Images, next

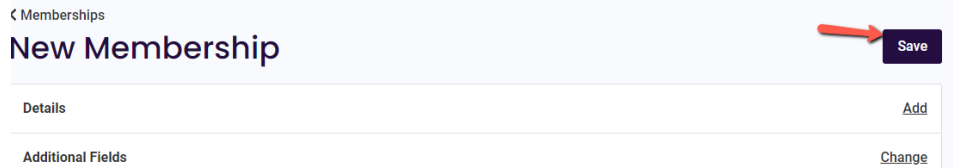


Photos [Add](#)

[Add image](#)
or drop image to upload

[Next](#) [2 ?](#)

- 8) Click **Save** on the top right



[< Memberships](#)
New Membership
Save

 Details Add

 Additional Fields Change

- 9) Anyone can purchase a membership via the online store. You will need to provide them with the link to your store (ex: Volusiacounty.Memberhub.store).
- 10) The potential member will:
 - a. select the applicable membership option/product
 - b. select quantity
 - c. **Add to Cart > Buy Now**
 - d. Complete the cc or debit card information
 - e. **Complete Order**

IX: Adding Items and Donations to the Store:

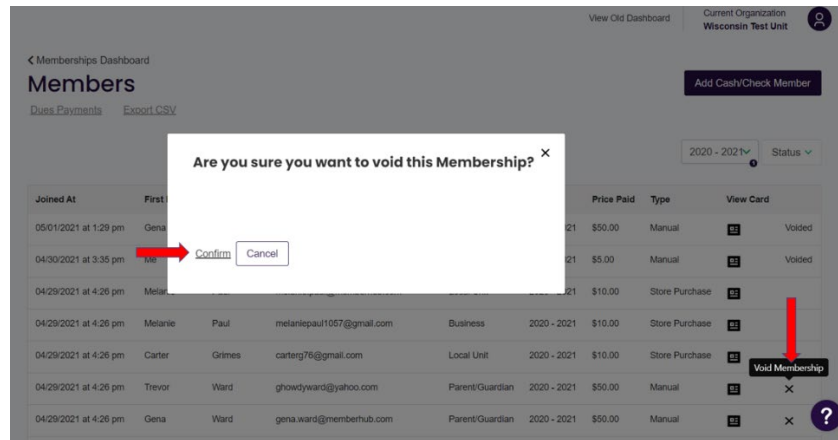
Once you set up memberships in your school store, you should add items like spiritwear, donations, event tickets, and no-fuss fundraisers to get the most out of your store and

- 1) Click on the **Online Store > Products > New Products**
- 2) Enter the **Required Information:**
 - a. Item / Event: Name, Short Description, Long Description, Price, when the item is available, and when the item is no longer available.
 - b. Donations: name and describe your donation. For 'enter a price,' select the option **Allow shopper to enter a custom price** and enter a **Minimum Price** for the donation.
 - c. Choose to turn on inventory tracking (or leave if off)
 - d. Adjust store visibility of product
 - e. Upload an image (optional)

X. How to Void/Edit a Transaction & PTA Membership

Administrators can void cash and check transactions that get created through the **Membership** module. This allows you to edit PTA membership entries by first voiding a transaction and then re-entering it.

- 1) Click on **Memberships > Manage Members**
- 2) Search for the incorrect membership in the search bar and click on the **X** (right)
- 3) Click **Confirm** to void membership



The star, the membership card, and the dues owed to the state will be removed from that person's profile. Voided transactions and memberships will automatically be sent to the state level PTAs in their reports and the MemberHub API.

Memberships purchased in the store must be refunded via the store in order to void the membership. To re-enter that person into the **Memberships > Manage Members > Add Cash/Check Member** form in order to give them an updated membership.

XI: Printing and Emailing Membership Cards:

When people join your PTA, a membership card is linked to their MemberHub profile.

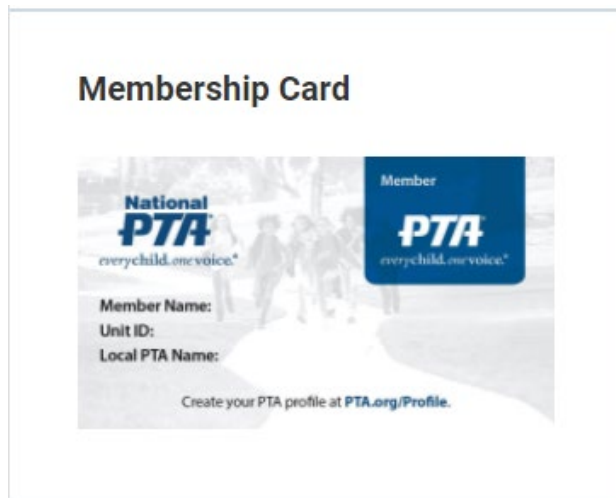
Members will receive an email notification with a link to print their membership card, or to save it as a pdf. The email is sent automatically by MemberHub, once you mark them 'paid' in MemberHub or when they pay through the MemberHub system. NOTE:

You will also be able to print a copy of the member's card or save it as a pdf by clicking on the blue card icon next to the member's name once they have been added to MemberHub and marked paid (especially helpful for members who do not have an email address).

Only Site Admins can see everyone's cards. Each member can only see his/her own card.

To access the membership cards (Site Admin only):

- 1) Click **Contacts > Manage Contacts**
- 2) Click on the Person's name to access his/her profile
- 3) Along right-hand side, you will see their membership card



- 10) Click on the card image and the card will open in a new window
- 11) You can print the card from this window
- 12) To email the card, right-click (on a PC) or two-finger click (on a Mac) and then click on **Save image as**
- 13) Save the image to whatever location you prefer. Create an email and attach the membership card image to the email.

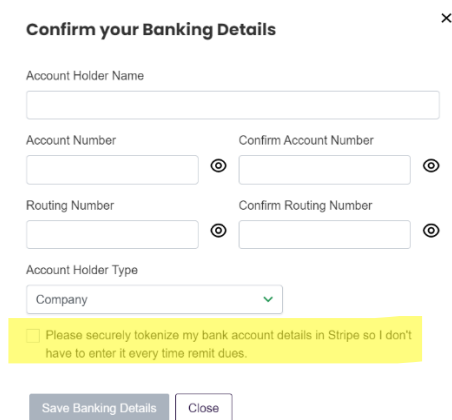
Another way to view the Membership Card is via the **Member List**

- 1) Go to the **Membership Module > Manage Members**
- 2) Find the person in your list
- 3) Click the **membership card icon** on the line next to the member's name
- 5) The card opens in a new tab. Use the **browser print option** to print the card.
- 6) To email the card, right-click (on a PC) or two-finger click (on a Mac) and then click on **Save image as..**
- 7) **Save the image** to whatever location you want. Create your email and **attach the membership card image to your email.**

XII: Submitting Membership Dues to Florida PTA:

State and National PTA dues are to be submitted electronically to Florida PTA. The fee for this option is a flat \$1 per remittance. Funds are sent directly to Florida PTA via an eCheck/ACH.

- 1). Select **Memberships > Remit State Dues**
- 2). Click **Send ACH Payment**
- 3). Enter your banking details. If you want the info saved, check the box to tokenize your bank acct. information.



The screenshot shows a web form titled "Confirm your Banking Details" with a close button (X) in the top right corner. The form contains the following fields and options:

- Account Holder Name:** A text input field.
- Account Number:** A text input field with a "copy" icon (two overlapping circles) to its right.
- Confirm Account Number:** A text input field with a "copy" icon to its right.
- Routing Number:** A text input field with a "copy" icon to its right.
- Confirm Routing Number:** A text input field with a "copy" icon to its right.
- Account Holder Type:** A dropdown menu currently showing "Company" with a green checkmark icon.
- Tokenization Option:** A yellow highlighted box containing a checkbox and the text: "Please securely tokenize my bank account details in Stripe so I don't have to enter it every time remit dues."
- Buttons:** At the bottom, there are two buttons: "Save Banking Details" and "Close".

- 4). You will see the payment on the **Dues Payment** screen, indicating status and details of the payment. If you do not see the payment on the list, submit a support request for assistance.
- 5). Within **Membership > Remit State Dues**, you can see all Dues Payments for each year -- print this page and circle or highlight the current payment to include with the paperwork for your files. If you also need to pay council dues per member, print two extra copies (one for the check request and one to include with the check you send to your council treasurer).

Payment Failed?: You will need to send your payment again. If you previously saved your bank information for state payments, the most common reasons for failed payments are: (1) the saved bank acct has been closed or (2) your bank acct is overdrawn.

New Bank Account?: If your bank information has changed and you owe the state for dues, [contact Support](#) to remove old bank info & you may enter the new bank information.