MemberHub Training

May 2023

Livonia PTSA Council

Dashboard

(4 unread) - kdummer@sbcgloba | MemberHub Training - Google Sl | MemberHub

fhsptsa.memberhub.com/dashboard

memberhub

Need some help... from a human?

View Workshops & Meetings

Current Organization
Franklin High School...

Franklin High School PTSA

- Dashboard
- Directory
- Calendar

YOUR TOOLS

- Communications
- Contacts
- Fundraising
- Store Management
- Website Builder
- Memberships
- Compliance
- Givebacks New!
- Settings

Franklin High School PTSA

Since 07/01/2022

673 Contacts

123 Members

$2,630.00 Gross Sales

gb

givebacks

Find out how up to 1% of every retail purchase made in Givebacks goes directly to your cause!

Recent Orders

View All Orders

71bfa7a969 Anna Gorman
$31.55

Recent Messages

View All Messages

Franklin PTSA Sock Fundraiser
Sent 11/21/2022 at 2:51 pm by Kellie Dummer

FHS PTSA Senior Scholarship Opportunities
Sent 02/20/2022 at 9:38 am by Kellie Dummer

Franklin PTSA Bylaws
Sent 09/23/2021 at 11:54 am by Kellie Dummer

New Message

Upcoming Events

View Calendar

Manage meetings, events, and volunteers.

Checklist

- Update your subdomain and mailing address
- Set up your Stripe account for online payments
- Edit your membership listing
- Add products to your store
- Your Fundraiser site is ready for you to begin!
- Subscribe to Product Fundraisers
- Add or import contacts
- Send a message

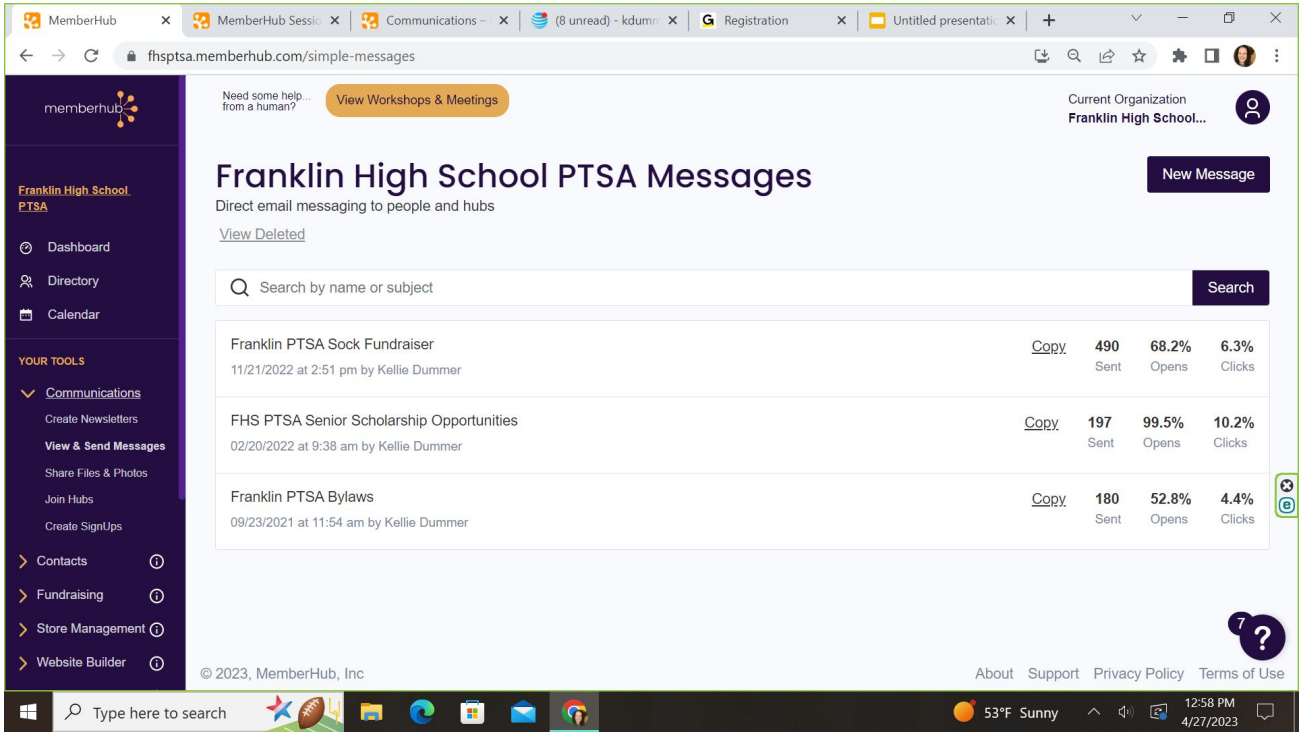
7

Type here to search

NASDAQ Composite...

2:14 PM
4/27/2023

Communications - View & Send Messages

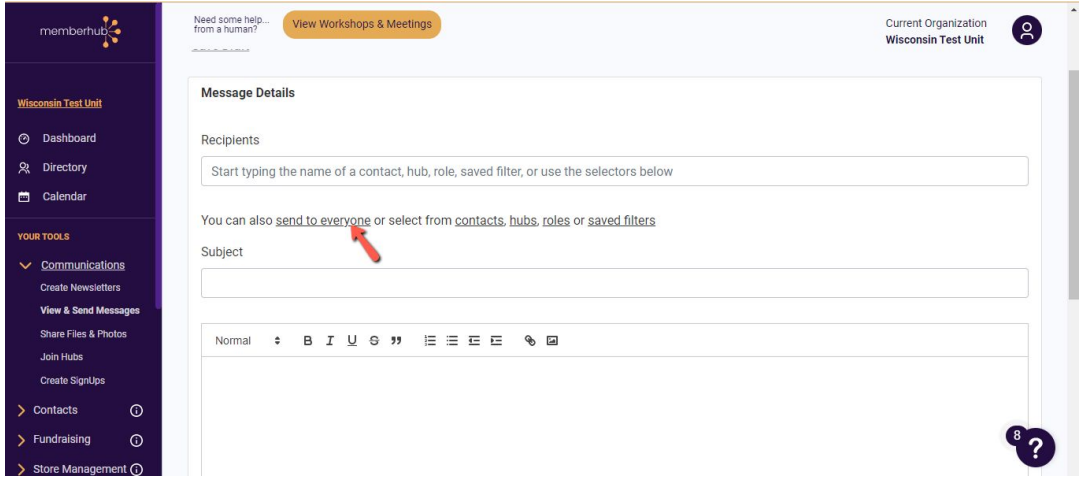


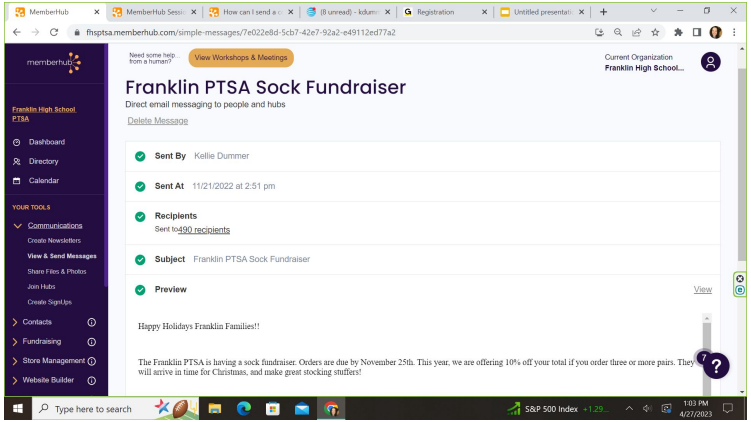
Newsletters, Messages, and Events allow you to select recipients using options found under the recipient's box. This is handy for when you want to send a communication to only a certain list of people, such as only paid members. You can send this communication to only your members by choosing the role option under recipients and then member from the drop-down list. Similarly, you can use the hubs or filters option to contact a specific hub list, or filter you have saved on your contacts page.

Find more detailed steps for the recipient list you are trying to message at the links below.

- Communicate with everyone in your site
- Communicate with paid members
- Communicate with a hub
- Communicate using a saved filter

Communications - View & Send Messages cont.





Sending to # of recipients will reflect the number of people who will receive the message. This number excludes blocked emails and unsubscribed emails. You can preview the list of recipients by clicking on **Sending to # recipients.**

Create your message, add attachments, etc. You can schedule the message to send at a later time or press Send Message at the top now. Then there will be a follow up screen showing who sent the message, to how many people and a view of the message.

Communications - Share Files & Photos

MemberHub | MemberHub Sessio | Communications – | (8 unread) - kdumn | Registration | Untitled presentatio

fhsptsa.memberhub.com/files

memberhub

Need some help... from a human?

View Workshops & Meetings

Current Organization
Franklin High School...

Franklin High School PTSA

- Dashboard
- Directory
- Calendar

YOUR TOOLS

- Communications
  - Create Newsletters
  - View & Send Messages
  - **Share Files & Photos**
  - Join Hubs
  - Create SignUps
- Contacts
- Fundraising
- Store Management
- Website Builder

Files & Photos

Add File

Upload documents, photos & more. Organize them into folders to share within your organization

Add Folder View Archived

Home /

Search by filename

Actions

	Filename	Uploaded By	Uploaded At	Actions
	2021 Members /			...
	FHS PTSA Board /			...
	*FHS PTSA Members /			...
	FHS PTSA Membership /			...

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NASDAQ Composite...

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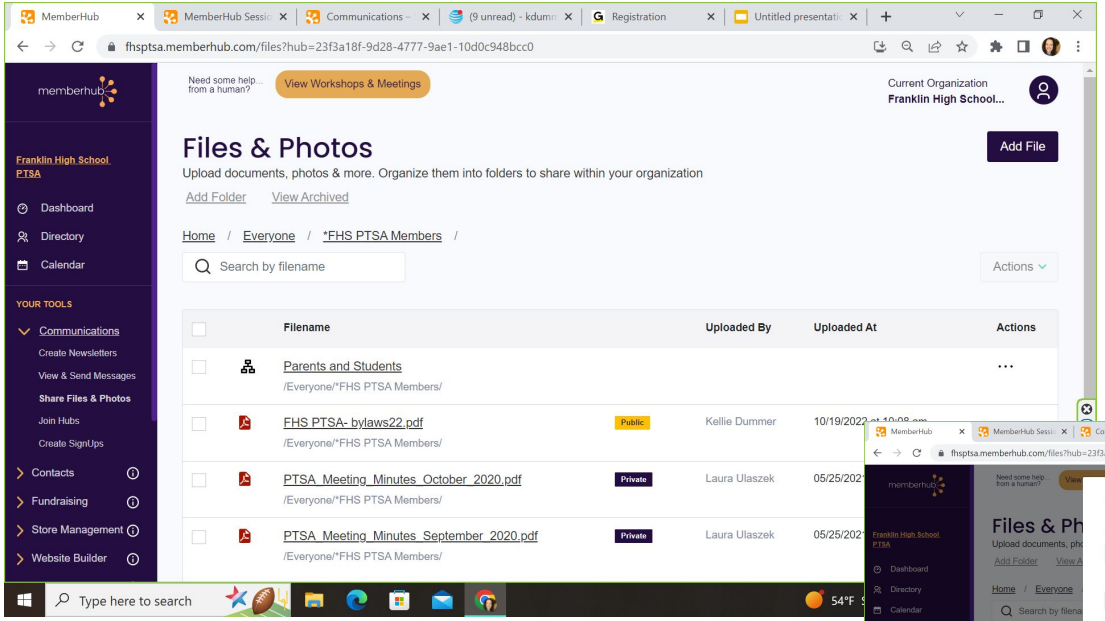
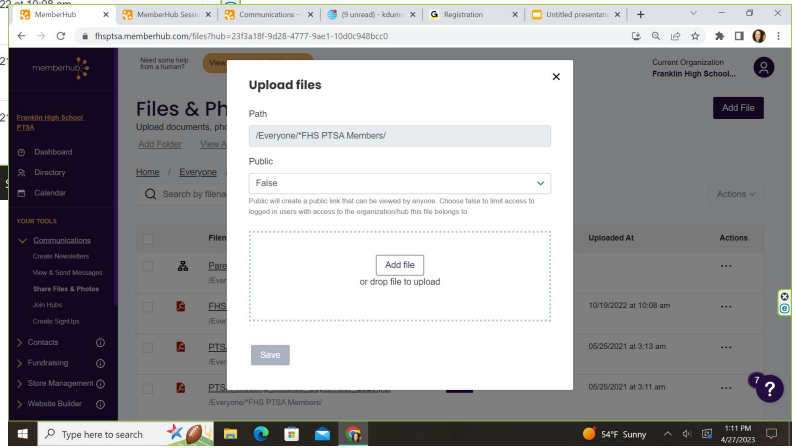
4/27/2023

Communications - Share Files & Photos cont.

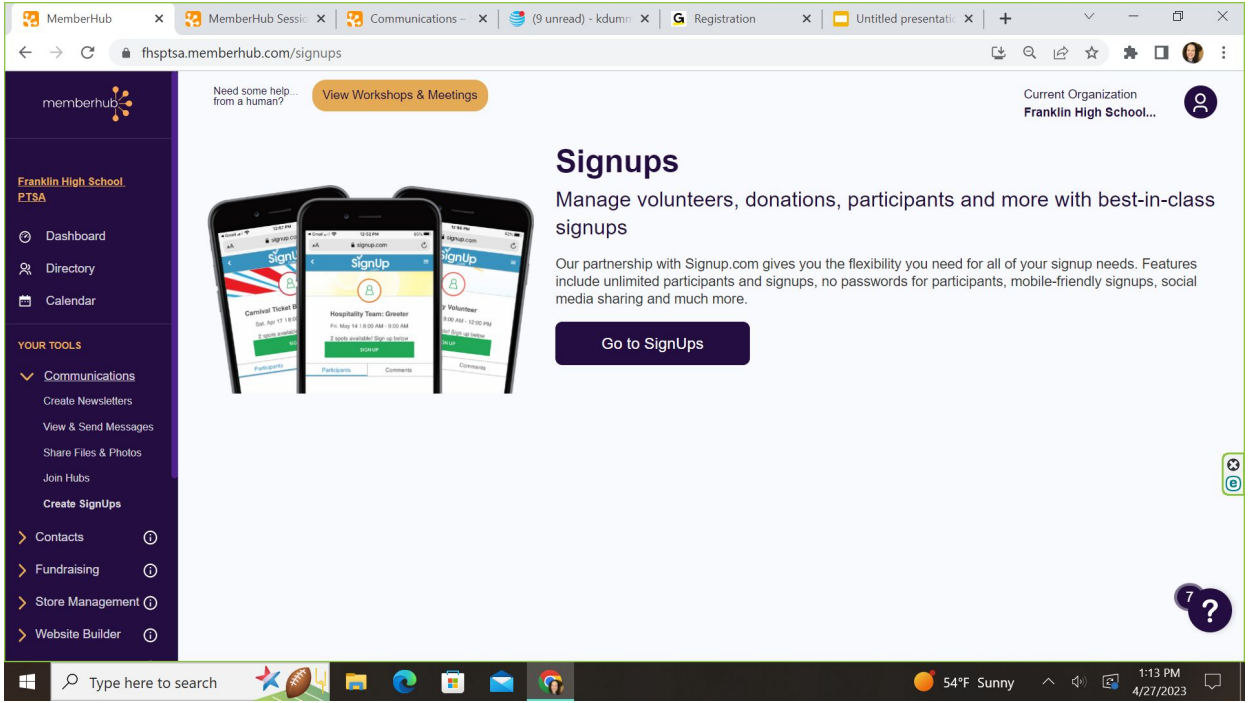


If you click **Add File** before selecting a Hub everyone in your MemberHub will be able to see if. If you click a Hub first and then **Add File**, only the people in that hub can see the file or photo. Then attach the file or photo that you would like to save.

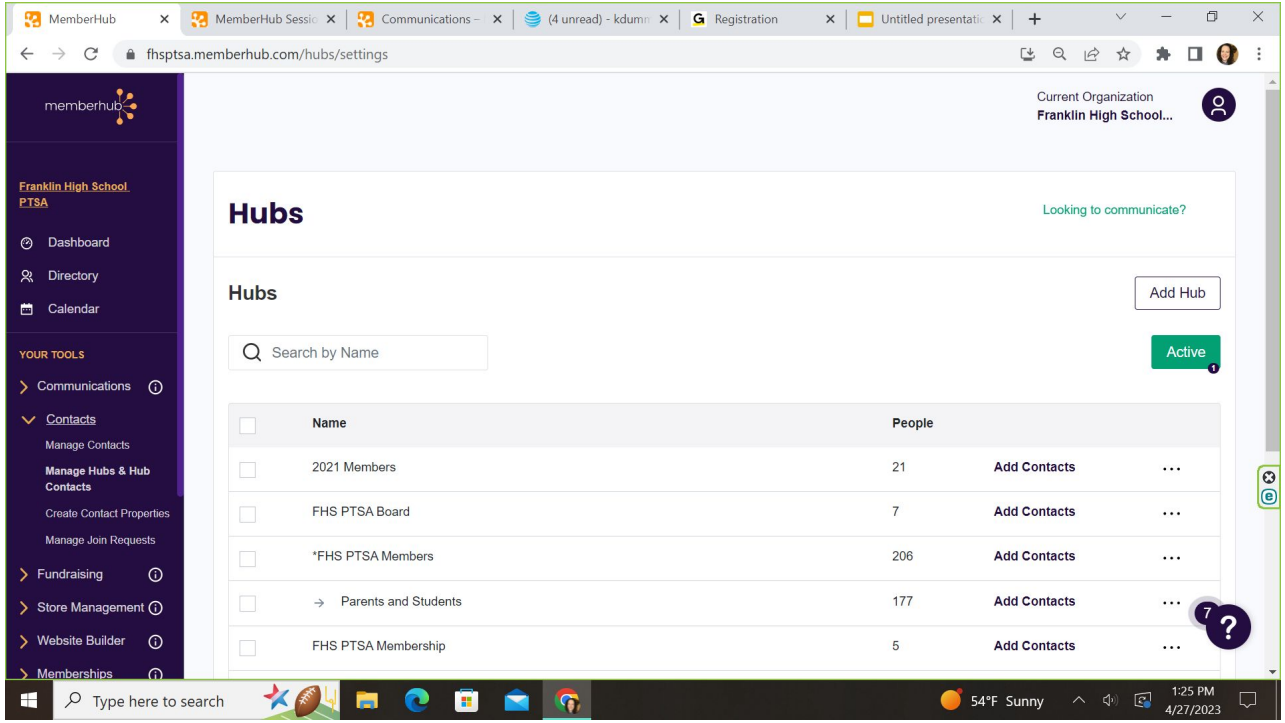


Communications - Sign Ups

Very similar to Sign Up Genius. You can create Sign Ups for activities or dances.



Contacts - Creating and Managing Hubs



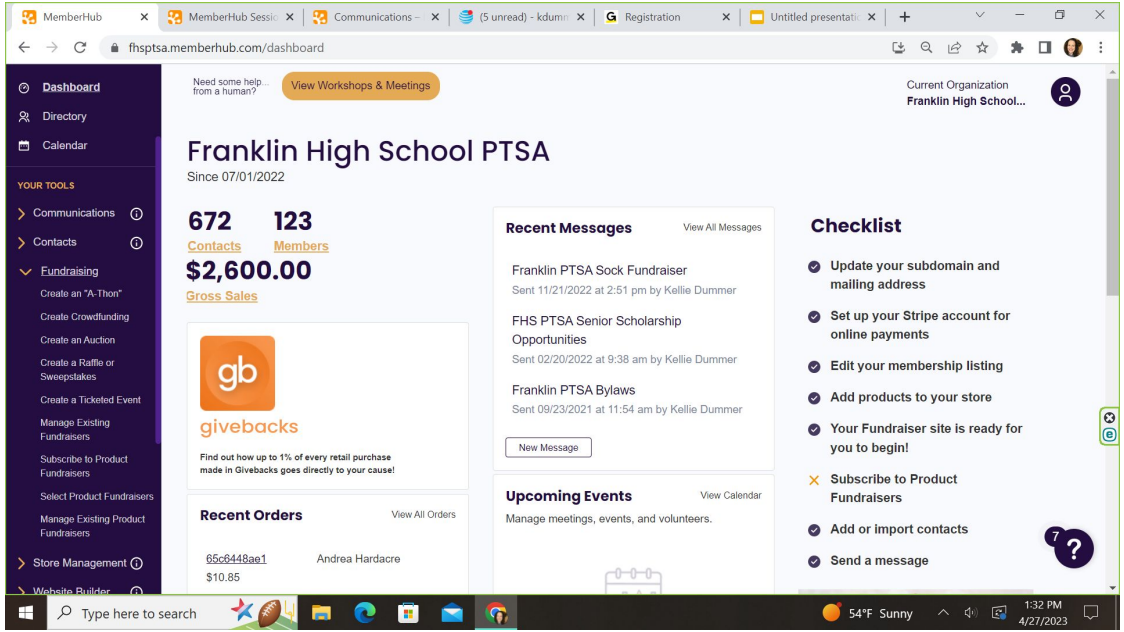
https://support.memberhub.com/hc/en-us/categories/360000418053-Communications

Fundraising

To learn about all the fundraising options within MemberHub schedule a 1 on 1 with a MemberHub associate. There are options for fun runs, raffles, auctions, crowdsourced funding

https://info.memberhub.com/book-a-fundraiser-meeting

Many Fundraising Options



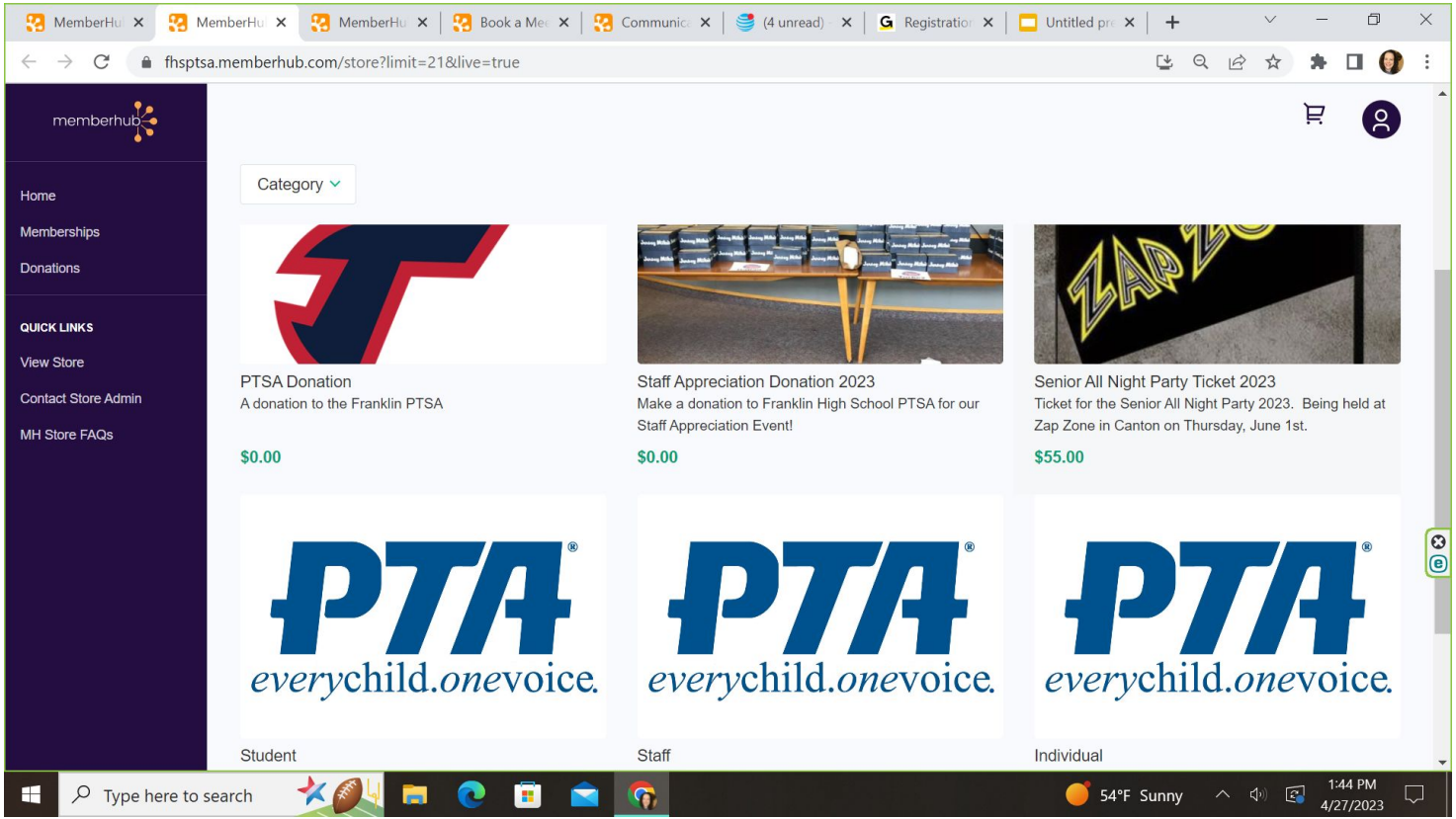
Store Management

Again there are many online training articles and videos. Have someone on your board become the “MemberHub Expert”. This person can spend time reading articles and developing your MemberHub site and store.

https://info.memberhub.com/store-setup

To start you want to make sure you can at least sell Memberships via your store. This should already be set up for most Livonia PTA’s. Once this is set up you can use your store to collect donations for staff appreciation or general donations. You can sell tickets to events, t shirts, or fun run tickets. MemberHub allows you to put in start and stop times for certain donations and tracks who has made purchases.

Store Management cont.



Store Management cont.

MemberHub | Memberships – MemberH | (4 unread) - kdummer@s | Registration | Untitled presentation - G

fhsptsa.memberhub.com/orders?status[compare]==&status[value]=purchased&limit=50&timezone=America/New_York

Franklin High School PTSA

Need some help... from a human? View Workshops & Meetings

Current Organization
Franklin High School...

- Dashboard
- Directory
- Calendar

YOUR TOOLS

- Communications
- Contacts
- Fundraising
- Store Management
  - View Sales Metrics
  - Manage Products
  - Manage Categories
  - Manage Bundles
  - Manage Fundraiser Links in Store
  - Review Orders
  - View Payouts
  - Edit Store Settings
- Website Builder

Search by email or name

Actions | Filters

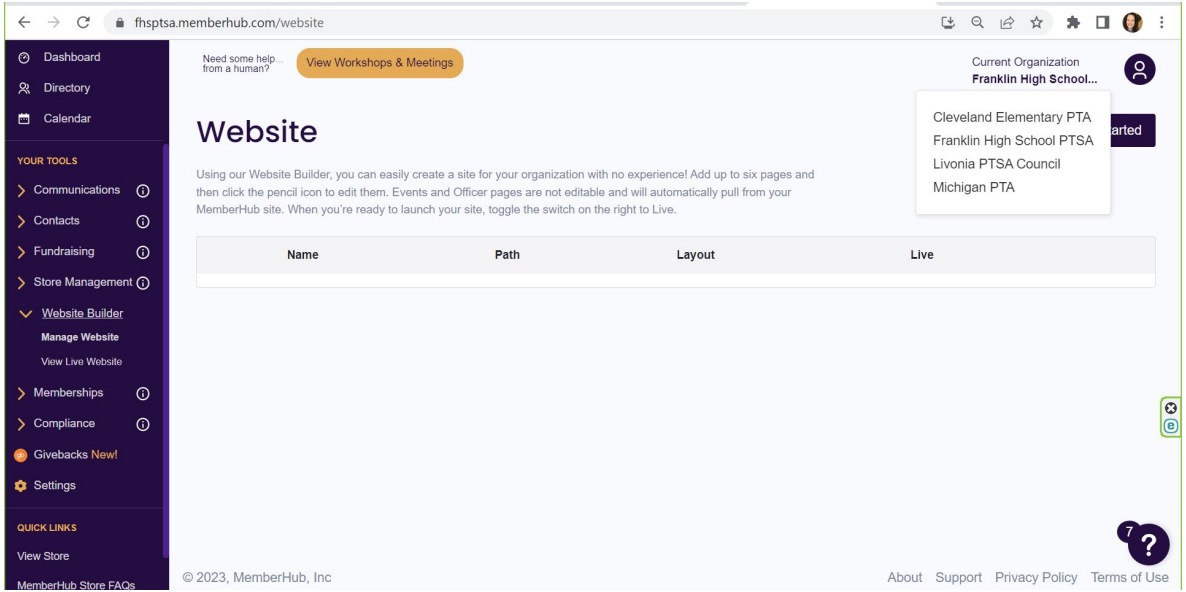
Order ID	Customer Name	Purchase Date	Status	Fulfillment Status	Total
71bfa7a969	Anna Gorman	04/27/2023 at 1:52 pm	Purchased	Not fulfilled	$31.55
65c6448ae1	Andrea Hardacre	04/27/2023 at 12:46 pm	Purchased	Not fulfilled	$10.85
05965259ed	Patty Salisbury	04/26/2023 at 8:24 am	Purchased	Not fulfilled	$57.43
dfb9f76fc8	Jill Diamond	04/26/2023 at 6:11 am	Purchased	Not fulfilled	$57.43
4630901cc6	danielle Stabler	04/25/2023 at 10:02 pm	Purchased	Not fulfilled	$16.03
4ba5fa985f	Melissa Hunt	04/25/2023 at 9:18 pm	Purchased	Not fulfilled	$57.43
20727d1604	Kristin Kostik	04/25/2023 at 4:25 pm	Purchased	Not fulfilled	$57.43
6cda45280e	cheryl shackelford	04/25/2023 at 1:12 pm	Purchased	Not fulfilled	$57.43
0252a35139	Benjamin Mocadlo	04/25/2023 at 12:12 pm	Purchased	Not fulfilled	$57.43

Type here to search

54°F Sunny 2:01 PM 4/27/2023

Website Builder

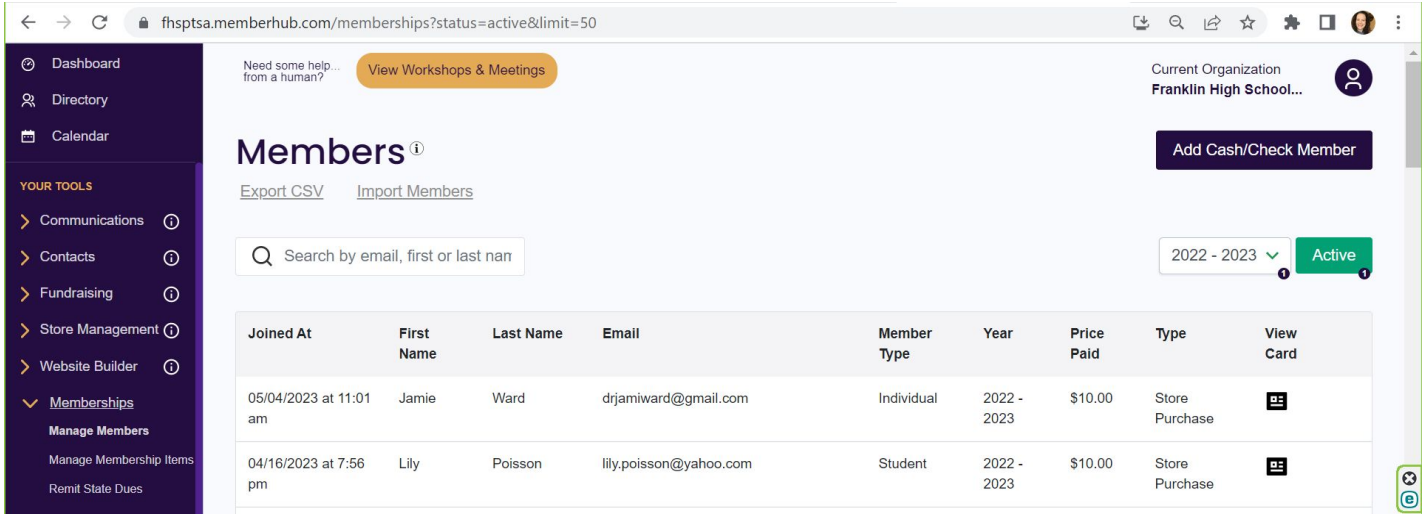
https://support.memberhub.com/hc/en-us



Dashboard tips:

- Under Current Organization- you can see all the PTA's that you have access too. You can switch between them here.
- In the lower corner you see the ? - if you click that you will see help menus and you can contact MH support.
- In the upper section, the orange box with View Workshops & Meetings is how to get to all the help you need.

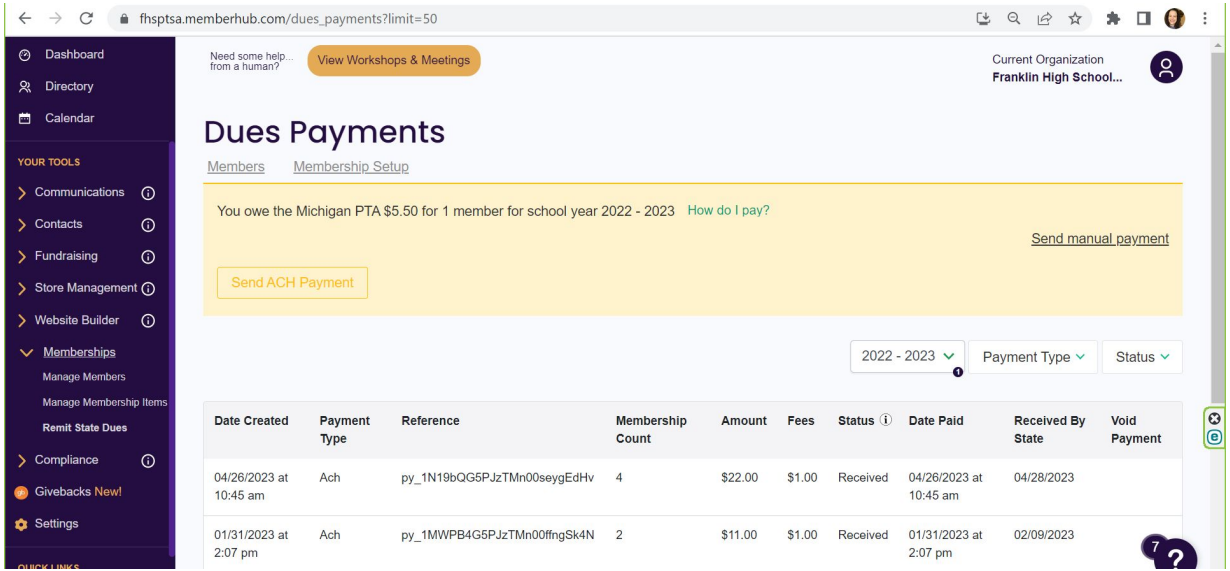
Membership



Entering members who pay with cash or check (members who pay via MemberHub store are already in your member list)

- Click Manage Member, then click Add Cash/Check Member
- Click the Type of Membership it is; Individual, Staff or Student
- Enter the required information. Make sure the correct year is in **School Year**

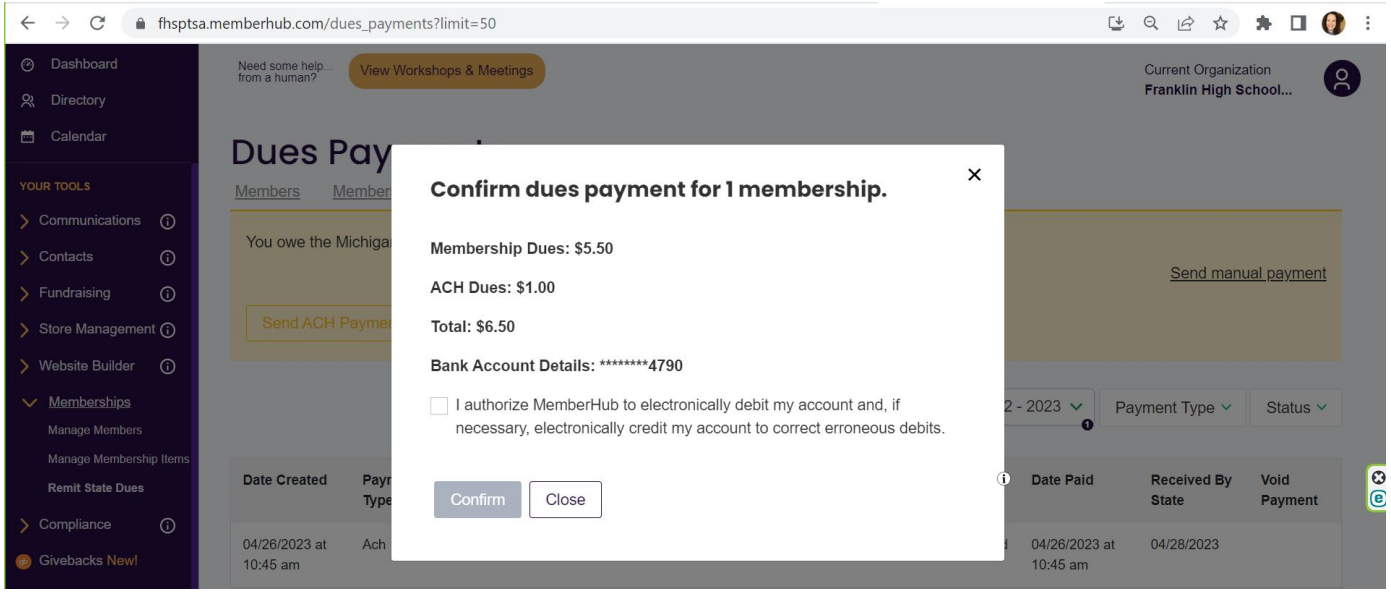
Membership cont.



By the 28th of each month you must pay Michigan PTA for the membership that were purchased that month. The preferred method is through MemberHub **Remit State Dues**

- You will see in the yellow box how many members you owe for. Please make sure this number reconciles with your membership income. That includes cash/check & MH income.
- Only the President or Treasurer can make this membership payment via MH.
- **Send ACH Payment** is an electronic payment that is withdrawn from your PTA account.
- If you want to send a check to Michigan PTA for memberships then you need to click **Send Manual Payment**

Membership cont.



- There will be a $1 fee each month.
- More MemberHub Membership Trainings:
- https://support.memberhub.com/hc/en-us/categories/1500001403101-Memberships

Compliance - How To Add New Officers

You will need to enter your PTA officers in MemberHub. Follow these steps below to enter your officers.

1. If you are a Site Administrator for your PTA MemberHub site you will see the **Compliance** link along the left side. When you click on this button you will be taken to the **Compliance Module.**

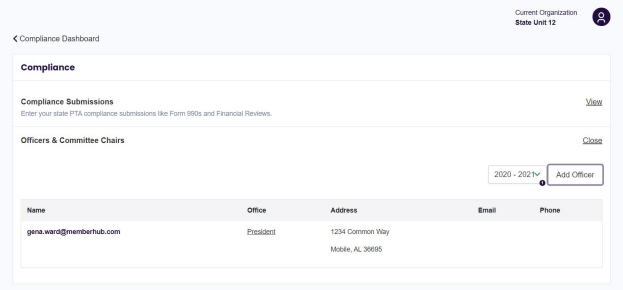
2. Click on **Officers**. You will see the current year's officers as well as officers from previous years.

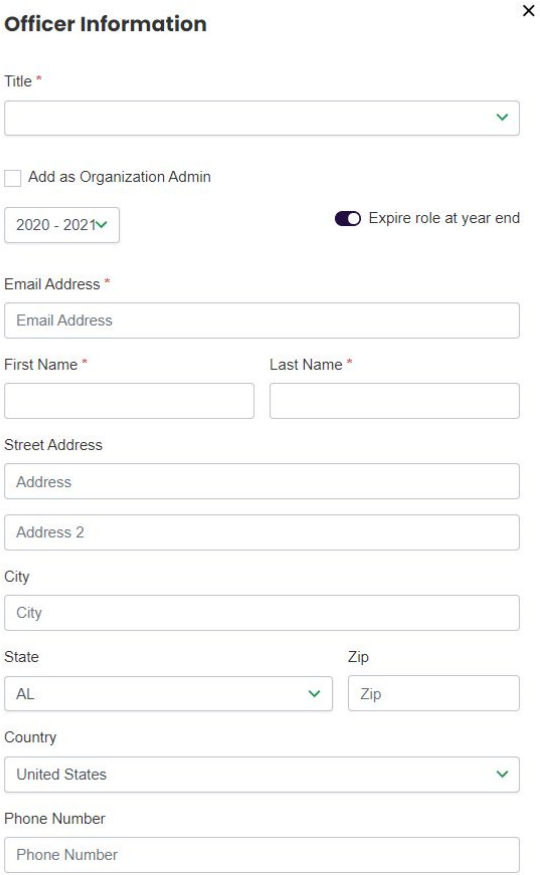
***Note**: After June 30, past year officer information cannot be updated or removed. Prior year officer information should remain in MemberHub for state-level PTA data record, therefore, you are not able to delete past officer information.*

3. **Select the year first,** then click the **Add Officer** button on the right. The resulting popup window will have you select officer role, enter Name, Email and other information. Your State PTA determines what officer roles are listed in this area. If you have officer that is not listed, you can contact your State PTA or add them as Other.

4.**Check the box to Make an Organization Admin** if you want the officer to have admin rights on your site. If not, you can leave this box unchecked.

5. Click the **Save** button on the bottom.





Compliance - Uploading SOA Documents

Specific Requirements vary state to state, but all PTA's can submit their required compliance information by going to their Compliance under your tools on the left menu > Enter State Submissions and selecting Submit on one of the different areas on their Compliance Module Dashboard. **For Livonia submissions please follow the due dates outlined in the PEP documents.**

Officers: You can click this button to be brought to a page that provides your current and past year officers in your site. You can add new officers and remove current year officers in this area.

Unit Data: You can click this button to view all data pertaining to your PTA. If you see any discrepancies on this page, contact your State PTA to update this.

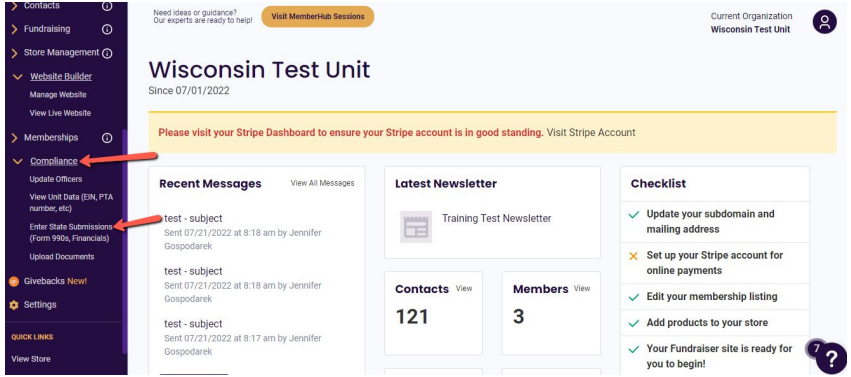
Enter Submissions(Form 990, Financials): This section is where you would submit each of your different areas of compliance.

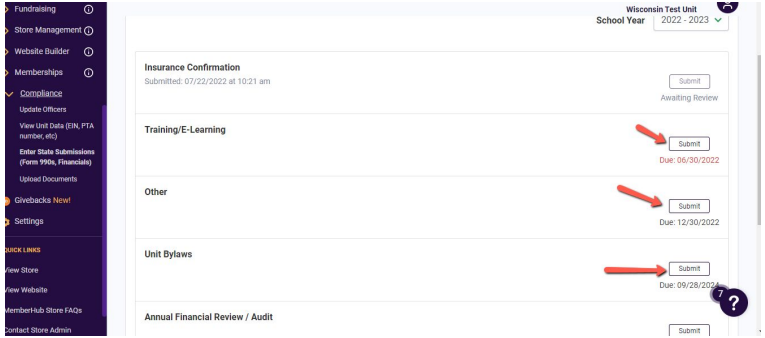
- Insurance Confirmations
- ByLaws Submissions

Form 990
Audit/Financial Reviews

Budget Submission

Documents: Here is where your unit can submit electronic documents to your State PTA.





Compliance - Uploading SOA Documents cont.

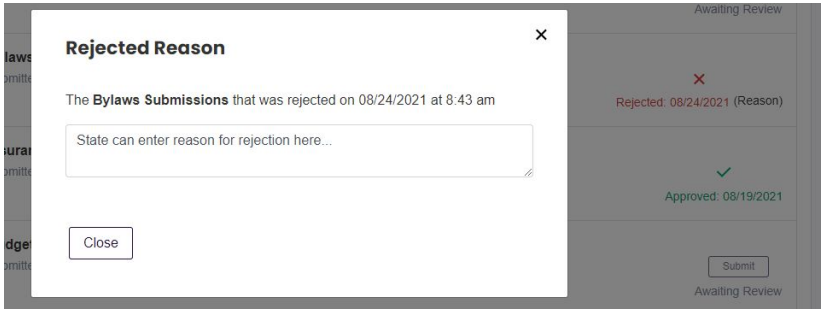
Approval status:

Awaiting Review: Upon completing submission, the status of your Compliance form will display as awaiting review. Your state PTA can then review and approve according to their procedures.

Approved: If your State Approves your submission, they will mark it as approved and the status will be indicated in your site. The person who submitted the form will also receive an email notification of the status update.

Rejected: If your State Rejects your submission, they will mark it as rejected and can explain the reason. The status will be indicated in your site and the person who submitted the form will also receive an email notification of the status update. Reason for rejection can also be viewed from your Compliance Submissions Page.

**** After a submission is rejected**, you can either choose to Resubmit or Archive the submission to allow you to start over.



Compliance Document Storage

Compliance Document Storage gives your PTA/PTSA a location to store your compliance documents. No worries as leadership changes. All admins will have access to historical compliance documents. Your State PTA can also access these files to ensure you are in compliance with State PTA policies.

Compliance Document storage sorts your documents into different compliance categories. **Please note:** Your state PTA may have different Compliance Requirements than listed in this article. If you have any further questions on this, please reach out to your State PTA leaders to inquire. **(Follow Livonia PEP guidelines)**

As an **administrator** in your MemberHub site, you will have access to **Compliance**. You can navigate to the Compliance Dashboard using your Quicklinks in the Modules list or navigate directly from the **Sitemap** for quick access to all of your tools.

Click on the Category to view existing documents or upload new ones. Each folder allows you to filter your view by School Year and Upload documents.

Click on the Title of the document to view/download or click on ... to Archive.

Click "Add Upload" button to Upload new documents.

This is NOT where you upload SOA documents. This is for other unit documents.

Compliance Document Storage

Upload your compliance documents

Compliance /

Select School Year 2020 - 2021

- Financial Review / Audit
  /compliance
- Form 990 Confirmation
  /compliance
- Budget
  /compliance
- Bylaws / Amendments
  /compliance
- Insurance Confirmation
  /compliance
- General
  /compliance

Prev Next

Compliance Document Storage

Add Upload

Upload your compliance documents

View Archived

Compliance / financial-review-audit /

Select School Year 2020 - 2021

Basic Template.png
/compliance/financial-review-audit
Uploaded by: Jennifer Gospodarek

1 - 1 of 1 Prev Next

Upload a file

Directory

/compliance/financial-review-audit

School Year

2020 - 2021

You are uploading this file for the year **2020 - 2021**

Add file

or drop file to upload

Save