NCGA Checklist for Online Membership

☐ **1. Membership Setup**

☐ **2. Assign Membership**

☐ **3. Add/Remove Members (Optional)**

☐ **4. Registration URL for Sharing Options**

Before we begin:

You plan to leverage memberplanet to collect online and offline membership payments - that's great! First things first - you'll need to claim your admin account. You should receive the Claim Admin Account email from memberplanet. **Click the claim account link** within the email to activate your account.

After clicking the claim account link, you will be prompted to **enter your email address** to activate your account.

An onscreen notification will appear and a verification email will be sent to the email address you entered. In the verification email you receive, **click the verify account link**.

You will then be prompted to **create a password** and complete the activation process.

When finished, you will receive a confirmation page with a link that will direct you to your admin portal on memberplanet.

If you have not received a Claim Admin Account email, please contact member@ncga.org

One thing to keep in mind is when you first log in to memberplanet and view your member database, you will see your existing members. These records are automatically populated because of our sync with GHIN. Now let's get started with Step 1: Membership Setup.

☐ 1. Membership Setup

First, go to your memberplanet admin portal. On the left navigation sidebar, click **Membership**.
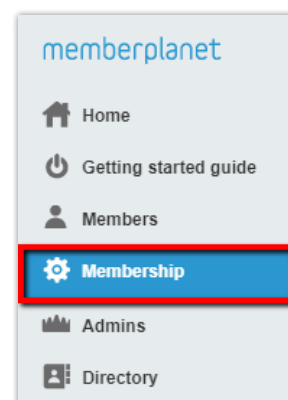
On your membership dashboard, you will follow Option A to set up online membership. You can completely ignore Option B, which is for clubs that only want to collect membership offline. Under 1) Set Up Online Membership Tools, click **Membership Levels and Automation.**
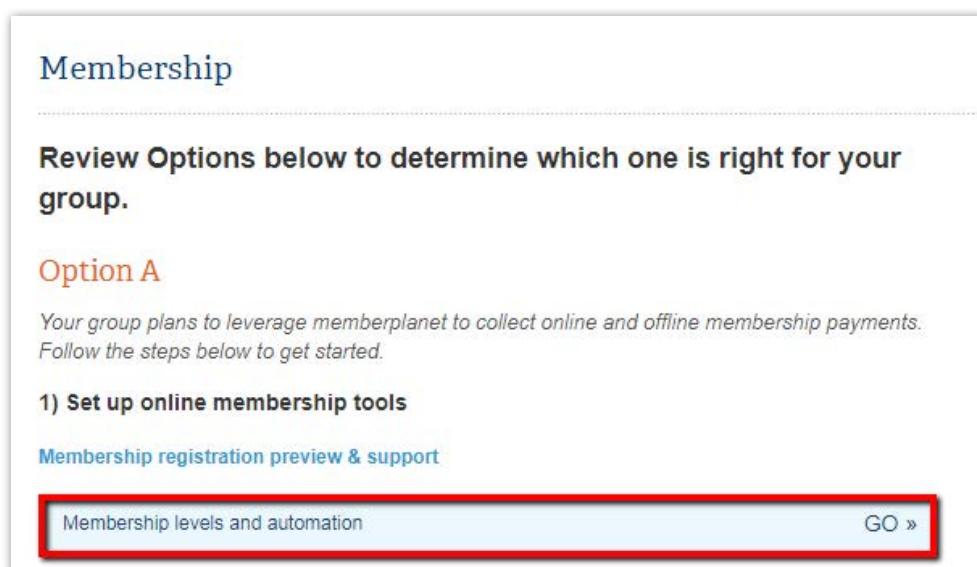
If this is your first time going through membership setup, you will see a screen to **select your renewal cycle**, which will determine when you charge your members for their membership, and when NCGA bills you for your members. You will only see this page once, and after you choose one of the following selections, you will not be able to change it.

Calendar-year membership: Registration opens Oct. 1. Current members will be charged Jan. 1 each year. NCGA will bill you on Jan. 15 each year.

OR

Anniversary-based membership: Registration is open year-round. Current members will be charged the same day of the year in which they joined your club. NCGA will bill you based on the month in which they joined your club.

Confirm your selection by clicking the checkbox at the bottom of the section.

Click **Continue.**

On your membership levels page, ensure that the dropdown menu is set to **My Group Has Membership Levels**, then click **Add a Membership Level**.

3

Fill in the details for the level: **Level title**, select **Paid** (do not select Free, as this will cause the system to malfunction because of our customizations), **add the price** and select from the option(s) for **how members can renew**.

You will not be able to change the membership period - these dropdowns will be preset and locked based on your renewal cycle selection.

In the **Renewal Date Restriction** section, you have the option to let members renew membership at any time or let members renew in a certain number of days before their renewal date.

Important note: If your group does **calendar-year membership** (Jan. 1 - Dec. 31), we recommend you set the renewal to open **91** days before a member's renewal date. This will open membership registration on Oct. 1.

If you are adding a new member fee and/or reinstatement/late fee, type it in the respective text box in the **Fee** section. Then click **Continue**.

Fee

New member fee
Applied to members who have never been a member in the group

$ 0

Reinstatement fee
Applied to members who have Lapsed and are rejoining the group

$ 0

Please note:
Any changes to this level will NOT affect dues for members who are on this level. In order to apply these changes to an existing member's payment schedule, you must reassign the level to the member. If you do change an existing member's payment schedule, we highly recommend notifying your members of any change to price or frequency in order to avoid confusion.

Cancel   Continue

You can automate renewal reminders by clicking **Edit** for any of the preset timeframes.

Reminders (?)

| 14 days before renewal date... | Edit | 7 days before renewal date... | Edit | On renewal date... | Edit |
| No actions selected | | No actions selected | | No actions selected | |

If you would like to automate the clean-up of your roster, click **Edit** and set actions for late and missed renewal. We recommend that you edit the action if a member has not renewed within 7 days.

Late & missed renewal (?)

| If not renewed within 3 days... | Edit | If not renewed within 7 days... | Edit |
| No actions selected | | No actions selected | |

Sign-up and renewal (?)

| When a member renews... | Edit |
| Send a renewal confirmation to member | |

Change 7 to **13** days, then select the checkbox next to **Change Member's Status to "Lapsed."** Then click **Save & Close**.

This will automatically remove the member from your active members database due to non-payment, and you therefore will not be invoiced for this member. The alternative to doing this is to manually remove members, which is discussed later in the checklist.

Click **Save and Close** at the bottom right when finished making edits.

You can continue to add more levels by clicking the **Add a Membership Level** button and repeating these steps. When you have completed adding additional levels, click **Save & Close** at the bottom. You will be brought back to your membership dashboard.

☐ 2. Assign Membership

It's time to assign your members to memberships. On your membership dashboard, pick up where you left off on Option A and click **Assign Membership** under 2) Manage Your Roster.

Option A

Your group plans to leverage memberplanet to collect online and offline membership payments. Follow the steps below to get started.

1) Set up online membership tools

Membership registration preview & support

Membership levels and automation	GO »

2) Manage your roster

Assign membership	GO »
Add or remove members	GO »

Click **Continue to Assign Membership**.

Assign membership

Setup

If you are setting up your membership on memberplanet for the first time, it's important that you assign membership levels to all your active members.

Assigning membership:

- Enables automatic email reminders to direct your members to make their membership payments online
- Populates your membership reporting
- Waives the new member fee when your members renew their membership (note: new member fee is not required and may not apply to your group).
- Notifies the member that their membership is current (paid) and notifies them of their next payment date.

Maintenance

As you receive payments outside of memberplanet on an ongoing basis for renewing members, you will need to assign membership to reflect their new current membership standing.

Continue to assign membership »

The next page will let you assign members to your levels. If you scroll down, you will see a list of individuals that have been synced to your database from GHIN.

Select the **Assign Without Payment** (a) option. (The "Record a Payment" option is not relevant for setup and should be ignored). Select the **Membership Level** (b) from the dropdown menu. You'll see the membership levels we just created in this dropdown. Select one to start with.

Next, **enter the Paid-Through Date** (c). **Note:** If you have calendar-year membership, the paid-through date will always be Jan. 1.

Assign Level

Cancel

Use this module to set up or update membership levels and paid through dates for your members. Choose whether or not you'd like to record a payment while making membership updates and adjustments by clicking the "Record a payment" or "Assign without payment" options below.

If level requires a "Quantity," input the number of memberships that a member has purchased. If you are assigning more than one member to a level, the quantity needs to be the same for all members in a batch. If each member has purchased only one membership, enter '1' in the quantity field.

$ RECORD A PAYMENT
Use this option when you want to show the offline transaction in your payment reports

✎ ASSIGN WITHOUT PAYMENT
Best for when you just want to place a member on a level without showing a payment in your reports   **a**

Level *   **b** $69.00-Regular ▾

Paid through date *   MM/DD/YYYY   **c**
Date on which the next payment is due
If the renewal is on a cycle of fixed dates, this date must fall onto a valid renewal date in the cycle

Ensure that the **Choose Members** tab is selected and the Filter is set to **All**.

🔍 **Choose members**			👥 **All members**	
Search by name or email 🔍	Filter by	All ▾	and	Active & Inactive members ▾

Rows selected : 1

	First Name ▲	Last Name	Email	Level	Paidthru date
☑	Billy	Barker		General Membership (Member Covers Fees)	

Click the blue First Name or Last Name headers at the top of the table to sort alphanumerically and compare the list of names to your current paid member roster. **Click the checkboxes** next to the names you wish to assign membership to.

Click **Assign Level** at the bottom of the page to assign the selected members to the specified level. If you have multiple membership levels, just repeat this process to assign your members to their respective membership levels. Useful tip: On your subsequent go-arounds, you can use the filter to exclude members from your list that have already been assigned to memberships by selecting **None** from the "Filter by" dropdown menu. C

Congratulations! You have successfully activated your members.

☐ 3. Add/Remove Members (optional)

If any new members have joined your club and not yet been added to your roster, now is your chance to add them. Currently, you can add members through this process one at a time.

Navigate to your membership dashboard by clicking **Membership** in the left nav sidebar.
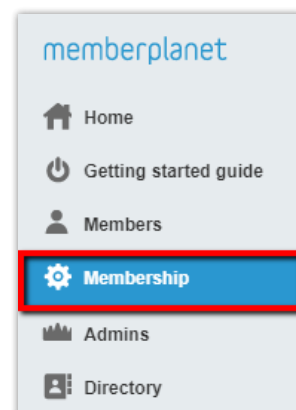
Pick up where you left off on Option A and click **Add or Remove Members** under 2) Manage Your Roster.
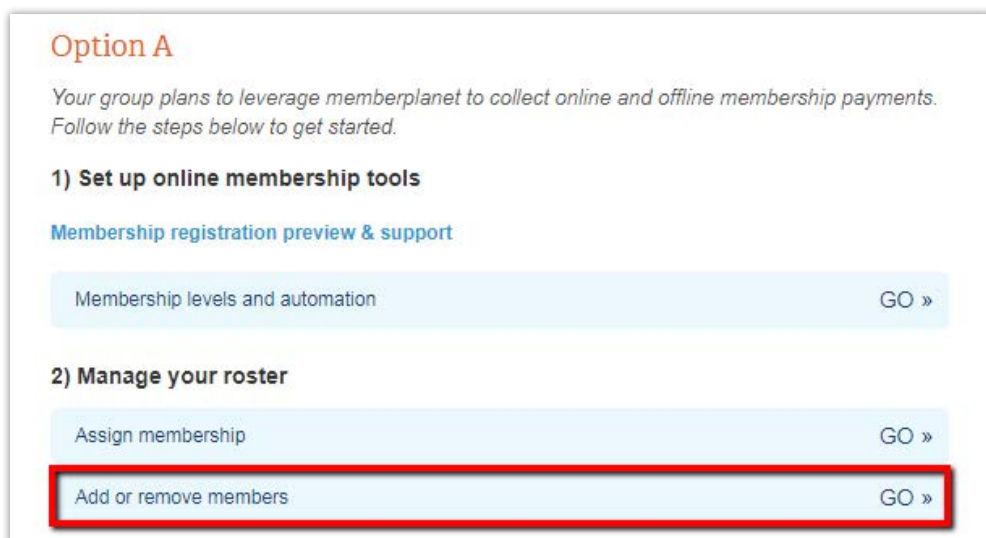
Add Members:

We'll go through how to add members first. Click **Add Members.**

If the member is new to NCGA, select the New Account option to create a new profile and generate a new GHIN number. If the member already already has a GHIN number, select the Existing GHIN number option. Note: the Add Non-Paying Member option is used to add non-NCGA members to your group and is useful for creating non-dues-paying admin accounts. This option will not generate a GHIN number for the user.

Enter in the member information.

Or enter the member's GHIN number and select continue.

Select the membership level you'd like to assign to the member.

Record how and when the offline membership payment was received.

Record Payment
Record a payment for this member

Payment method
Check

Summary

Regular Annually	$69.00

Total: $69.00

Payment date
month/day/year

Payment Memo

Review that the member information entered is correct then click **Continue**.

Review
Confirm your member details

Member Info	
Member level	Regular Paid-through date: 01/01/2020
Payment	Check Payment date: 11/01/2019

A confirmation will appear. To add more members, select **Add Another** and go through the same process.

You've added a member!
A member has been added to your group. Click continue to return to your member database, or create another member.

CONTINUE

ADD ANOTHER

Remove Members:

If any members need to be removed from your database, follow the steps below.

Navigate back to the membership dashboard by clicking **Membership** on the left navigation sidebar.

On Option A, click **Add or Remove Members** under 2) Manage Your Roster.

Click **Remove Members**.

You'll have two options to remove members from your group:

- Delete members - permanently remove them from the member database and cancel any future payments.
- Settling membership to Lapsed status - remove their access to the group and cancel future payments, but they will remain listed in your member database.

Note: Once you remove members from your group, this cannot be undone.

From the dropdown menu, select an action, then click the checkboxes next to the member names you wish to remove. Select the **Remove Member**s button at the bottom right of the screen.

On the next screen, confirm that you wish to delete the members you have selected by typing in REMOVE in the text box and clicking **Remove Members**.

Remove members from your group   Cancel

**You have selected 1 members to remove from your group.**

To confirm that you want to permanently remove these members. Please type the word REMOVE in the box below and click the button.

Remove members

The members you have selected will be removed and you'll be redirected to your membership dashboard.

☐ 4. Registration URL for Sharing Options

Now that you've completed membership setup and activating your members, it's time to share your membership registration with prospects and/or renewing members. Go back to your membership dashboard by clicking **Membership** in the left navigation sidebar.

memberplanet

🏠 Home

⏻ Getting started guide

👤 Members

⚙ **Membership**

👑 Admins

📇 Directory
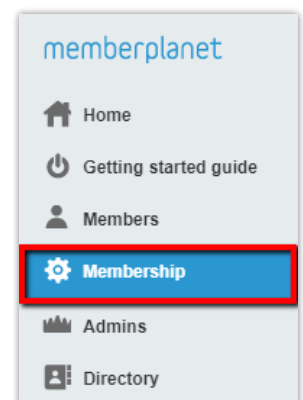
In Option A under 3) Get the Word Out, select **Configure Your Registration Link and Learn About Your Site Builder Options.**

Option A

Your group plans to leverage memberplanet to collect online and offline membership payments. Follow the steps below to get started.

1) Set up online membership tools

Membership registration preview & support

| Membership levels and automation | GO » |

2) Manage your roster

| Assign membership | GO » |
| Add or remove members | GO » |

3) Get the word out

| Configure your registration link and learn about your site builder options | GO » |

You have two options to share your registration link:

Use a memberplanet website: This will take you to Site Builder wherein you can set up your website. When you publish it, the registration link will already be included on it, and you can share the site URL anywhere.

OR

Copy and paste your registration link to share on an external site, social media pages, emails, etc.

Congratulations! You have finished the **NCGA** setup checklist!

Learn more: How to Launch Your Club Website with Site Builder.