



memberplanet

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.

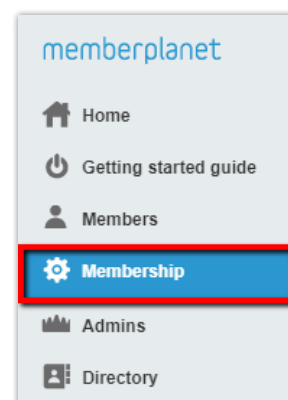
When finished, you will receive a confirmation page with a link that will direct you to your admin portal on memberplanet.

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

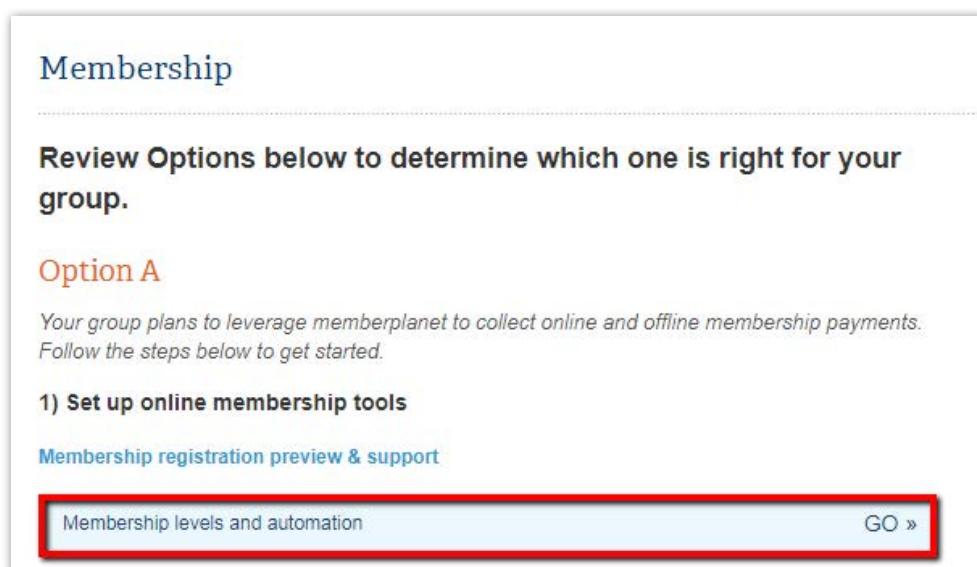
One thing to keep in mind is when you first log in to memberplanet and view your member database, you will see your existing members. These records are automatically populated because of our sync with GHIN. Now let's get started with Step 1: Membership Setup.

□ I. 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 I) 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.

Membership

Cancel

Before you start managing your membership levels, please configure your group with the options below.

Renewal cycle

Your renewal cycle will determine when you charge your members for their membership, and when NCGA bills you for your members.

- ☒ **Calendar-year membership**
Club membership runs from January 1st through December 31st. Registration opens on October 1st. Current members will be charged on January 1st each year, regardless of when they join.
- ☐ **Anniversary-based membership**
Club membership is based on the date when a member joins the club. Registration is open year-round. Current members will be charged on the same day of the year in which they joined your group.

Note: To change these settings moving forward, you must contact NCGA

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**.

Membership Levels

Organize your members & track membership renewal

What is a membership level?

Membership levels allow you to organize your members into different categories. For example, your group might offer a free membership or different tiers of paid membership levels. Use this page to set up your membership levels along with automated reminders and notifications.

My group has membership levels

Learn more about membership levels »

+

Add a membership level

Save & close

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.

| Label | Price \$ (?) | Period (?) | Renewal (?) |
|-------------|--------------|--|--------------------|
| Level title | Paid | Annually | Auto-pay or manual |
| | \$ 0 | Specific date | |
| | | 1st of Jan | |
| | | <input type="checkbox"/> Pro-rate payments (?) | |

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.

Renewal date restriction

☒ **Members can renew their membership at any time**

Members can renew as early as they want - this also means that members will be able to pre-pay for future months/years of membership if they want to.

☐ **The membership renewal page is closed until a certain number of days before the member's renewal date**

New members can still join your group at any time, but renewing members can only renew their membership closer to their paid-through date. Use this feature if you want to prevent members from pre-paying for future months/years of membership.

Renewal opens days before a member's renewal date

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

\$

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

\$

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**.

Membership level late renewal

Do the following actions days after the renewal date if member has not renewed

☐ Change member's type

☐ Change member's level

☒ Change member's status to "Lapsed"

Lapsed members will not be considered part of your group until they renew their membership. Lapsed members will not receive your email campaigns, event invitations, Quickpay charges etc.

☐ Send an email to the member

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

Level * b \$69.00-Regular

Paid through date * c MM/DD/YYYY

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

and

Rows selected : 1

| | First Name | Last Name | Email | Level | Paidthru date |
|-------------------------------------|------------|-----------|-------|--|---------------|
| <input checked="" type="checkbox"/> | 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.

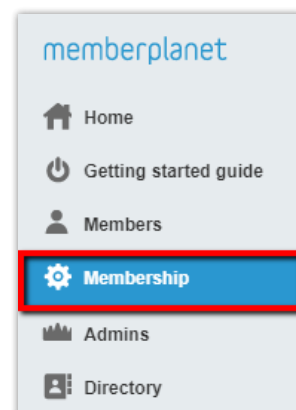
Click **Assign Level** at the bottom of the page to assign the selected members to the specified level. If you have multiple membership levels, just repeat this process to assign your members to their respective membership levels. Useful tip: On your subsequent go-arounds, you can use the filter to exclude 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.

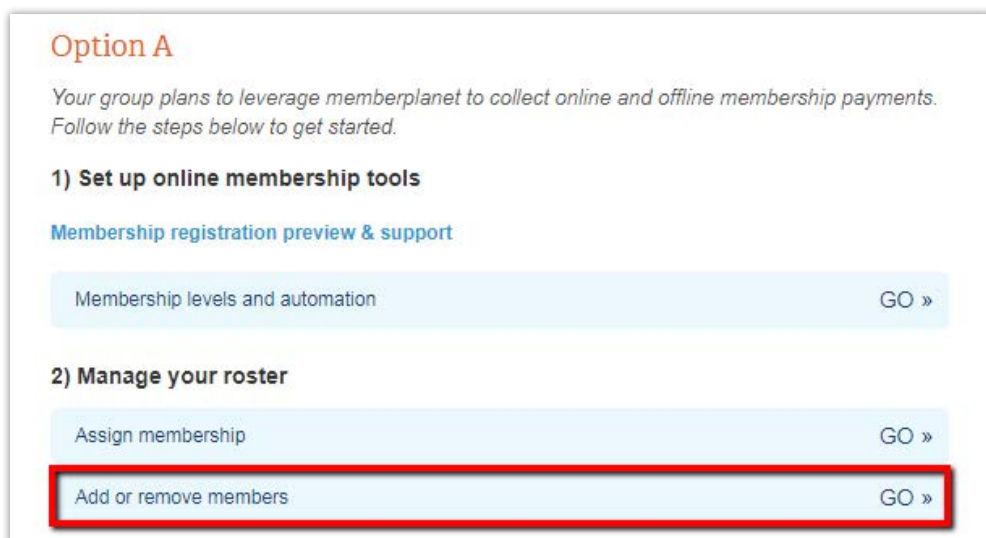
☐ 3. Add/Remove Members (optional)

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**.

Add or remove members

Use the tools below to manually manage your roster

To add new members who've joined offline, click the "Add members" button below.

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 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.

Add A Member

NEW ACCOUNT

EXISTING GHIN NUMBER

ADD NON-PAYING MEMBER

Enter in the member information.

Back

Create New Account
Create a new user account

First Name

Enter First Name

Last Name

Enter Last Name

Email

Enter Email

Date of Birth

03/day/year

Gender

Street Address

Enter Street Address

City

Enter City

State

Zip code

Enter Zip Code

BACK

CONTINUE

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

Enter GHIN Number

Locate an existing account

Enter GHIN Number

Search

Assign Member Level

Assign a level and select a paid-through date

| | | |
|--|---------|--------|
| <div>Regular</div> <div>Annually</div> | \$69.00 | SELECT |
| <div>Junior</div> <div>Annually</div> | \$39.00 | SELECT |
| <div>Junior exec</div> <div>Annually</div> | \$49.00 | SELECT |

Paid-Through Date

month/day/year

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

| | | | | | |
|--|---|----------------|----------------|----------|--|
| <p>Payment method</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">Check ^</div> <p>Payment date</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">month/day/year 📅</div> <p>Payment Memo</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> | <p>Summary</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <table border="0" style="width: 100%;"> <tr> <td style="width: 60%;">Regular</td> <td style="text-align: right;">\$69.00</td> </tr> <tr> <td>Annually</td> <td></td> </tr> </table> </div> <p style="text-align: right;">Total: \$69.00</p> | Regular | \$69.00 | Annually | |
| Regular | \$69.00 | | | | |
| Annually | | | | | |


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

Review

Confirm your member details

| | |
|---------------------|--|
| Member Info | [Blurred Member Information] |
| 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**.

Add or remove members

Use the tools below to manually manage your roster

To add new members who've joined offline, click the "Add members" button below.

Add members >

To remove members from your club, click the Remove members button below.

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 Members** button at the bottom right of the screen.

Remove members Cancel

This page allows you to remove members from your group in one of two ways: deleting member, or setting their membership to Lapsed.

Deleting a member will permanently remove them from Member Database and cancel any future membership payments. Lapsing a member will remove their access to the group and cancel future membership payments, but they will remain listed in your Member Database.

Please note: these actions cannot be undone

--Choose an action--

--Choose an action--

Delete members from my group

Change the status of membership to Lapsed

| | First Name | Last Name | Email |
|--------------------------|------------|-----------|-------------------------|
| <input type="checkbox"/> | Alyssa | Clark | aclark@memberplanet.com |

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.

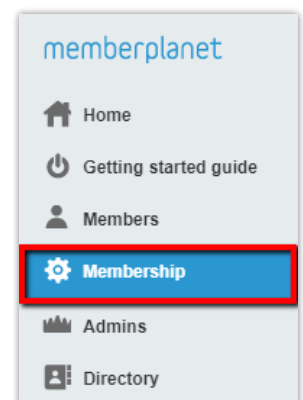
To confirm that you want to permanently remove these members. Please type the word REMOVE in the box below and click the button.

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.



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.

Registration link & website

Now that you've configured club membership and assigned membership to your members, it's time to get the word out. Please choose the option below that best suits your club.

I would like to use a memberplanet website

Click the button below to create custom website with membership registration. Once your site is published, you can direct your new and renewing members to complete registration and to log into their accounts.

[Go to your Site Builder »](#)

I will not be using a memberplanet website

To generate your membership registration link without creating a memberplanet website, click the "Generate" button below. This link can be included on your external website, social media pages, emailed, etc.

Your registration link is:

<https://ncgamemberplanettestclub.memberplanet.com/v2app/#!/register>

[Copy link to clipboard](#)

Congratulations! You have finished the NCGA setup checklist!

Learn more: [How to Launch Your Club Website](#) with Site Builder.