

Everything your Board Needs to know About

# MemberHub



## Prepare for your best year ever.

Learn how MemberHub helps every role in your  
organization.

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## Welcome to MemberHub!

**Welcome to MemberHub.** As a group leader, you are part of an amazing army of volunteers. We know it's a challenging job — our company is led by parents of young children who've spent countless nights in school gymnasiums trying to solve the age-old problems facing our schools. How to better engage parents?

How to raise more money? How to recruit more volunteers? How to make it easier for your school to coordinate a hundred little things?

**We know that running an organization is hard work.** And that's why we started MemberHub. Our software is designed to make the life of volunteer leaders like you a little easier — one place where you can manage everything including creating newsletters, managing volunteer signups, processing donations and sales, raising money, tracking membership dues, and filing necessary paperwork.

**You know your organization better than anyone.** But we intimately understand the issues that volunteers like you are facing. MemberHub is working with over 13,000 PTAs & other membership organizations across the country to help solve those problems and make their groups more successful.

**You may be wary about adopting a new software solution.** You may already have too much on your plate, or you may not immediately see the value in doing anything different from what you're currently doing. We get that. And that's why we've put together plenty of training and support materials to help make the transition as seamless as possible. On the pages that follow, you will find an overview of MemberHub's benefits for every organization leader. If you still have questions, visit our [support](#) center, or if you're ready to start setting things up in MemberHub and need assistance, [setup a 1:1](#) call with one of our customer success reps.

We can't wait to see how MemberHub helps you and your organization succeed.

Will Bowen, CEO

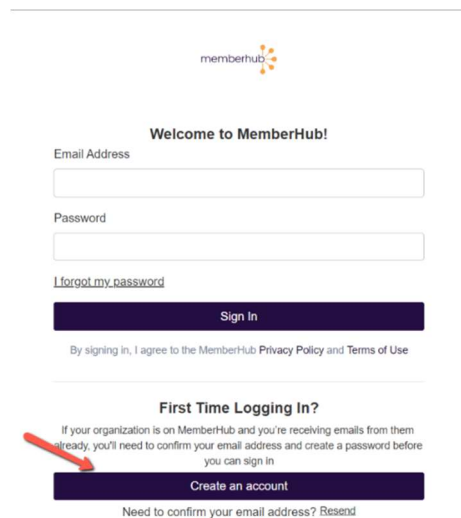
MemberHub

## Logging into MemberHub

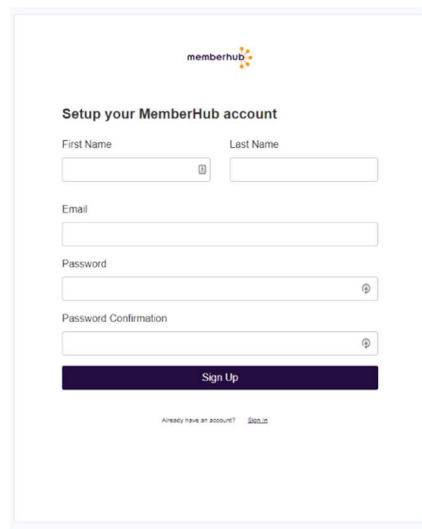
If you have already received access and confirmed your email address for your account, you can go to [app.memberhub.com/login](http://app.memberhub.com/login) and enter your email address and existing password.

If you have never logged into MemberHub before, you will need to follow these steps the first time you login to MemberHub to create your account.

1. Visit [app.memberhub.com/login](http://app.memberhub.com/login)
2. Click "Create an Account"

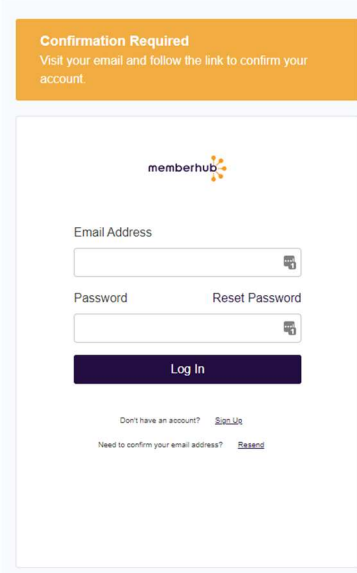
A screenshot of the MemberHub login page. At the top center is the MemberHub logo. Below it is the heading "Welcome to MemberHub!". There are two input fields: "Email Address" and "Password". Below the password field is a link that says "I forgot my password". A dark blue button labeled "Sign In" is positioned below the links. Underneath the button is a line of small text: "By signing in, I agree to the MemberHub Privacy Policy and Terms of Use". Below this is another heading "First Time Logging In?". A red arrow points to a paragraph of text: "If your organization is on MemberHub and you're receiving emails from them already, you'll need to confirm your email address and create a password before you can sign in". Below this text is a dark blue button labeled "Create an account". At the bottom of the form area is a link that says "Need to confirm your email address? Resend".

3. Enter your name, email address, and create a secure password.

A screenshot of the MemberHub account setup page. At the top center is the MemberHub logo. Below it is the heading "Setup your MemberHub account". There are four input fields: "First Name", "Last Name", "Email", and "Password". Below the password field is a "Password Confirmation" field. A dark blue button labeled "Sign Up" is positioned below the confirmation field. At the bottom of the form area is a link that says "Already have an account? Sign In".

4. Click Sign Up button.

You will then see this message on your screen and a confirmation email will be sent to confirm your email address.

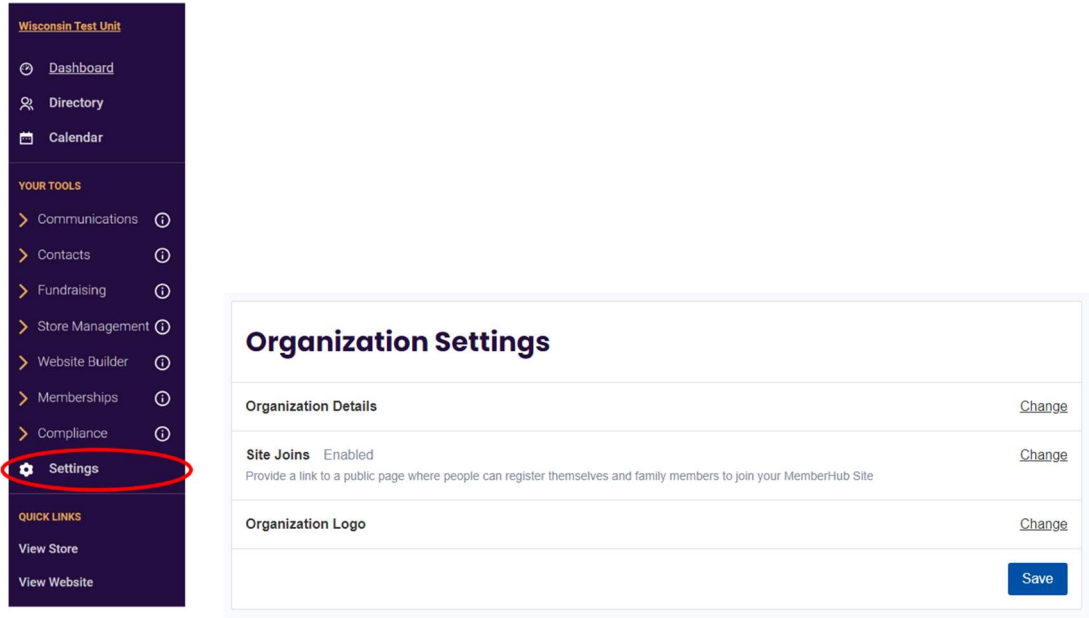


The screenshot shows a web page with a white background and a light blue border. At the top, there is an orange banner with the text "Confirmation Required" and "Visit your email and follow the link to confirm your account." Below the banner is the Memberhub logo. The main content area contains two input fields: "Email Address" and "Password". To the right of the "Password" field is a "Reset Password" link. Below the input fields is a dark blue "Log In" button. At the bottom of the page, there are two links: "Don't have an account? [Sign Up](#)" and "Need to confirm your email address? [Resend](#)".

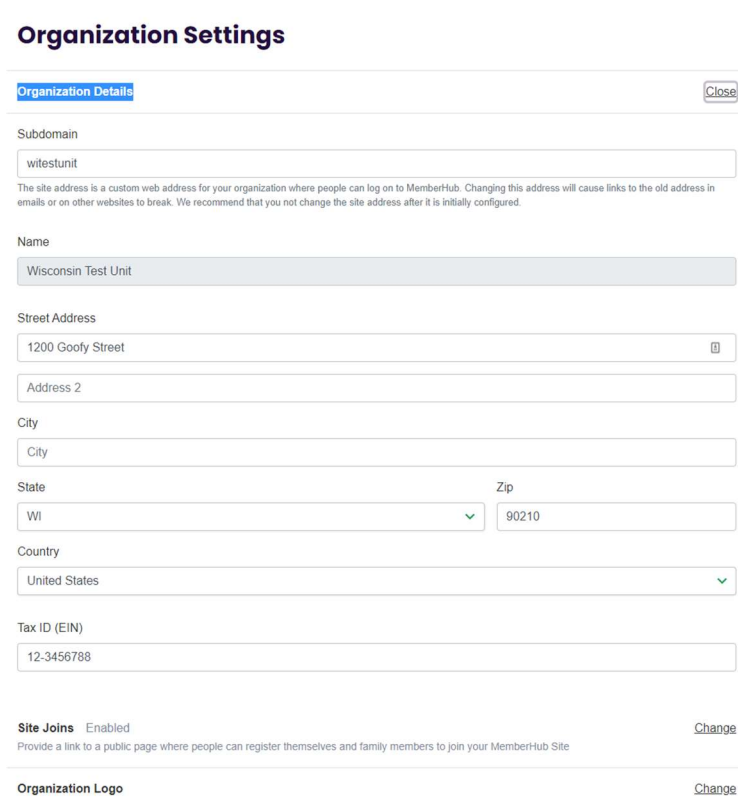
5. Locate your confirmation email in your inbox and click the link to confirm your account.
6. Once your account is confirmed, you can then go back to the login page [app.memberhub.com/login](http://app.memberhub.com/login) and enter your email and password.

# Customizing Your MemberHub Site

1. Click on **Settings** to view your **Organization Settings**.



2. Click Change to Expand the Organization Details section where you can set your subdomain, address, and Tax ID.



The image shows the 'Organization Settings' page with the 'Organization Details' section expanded. It contains the following fields:

- Subdomain:** wilestunit
- Name:** Wisconsin Test Unit
- Street Address:** 1200 Goofy Street
- Address 2:** (empty)
- City:** City
- State:** WI
- Zip:** 90210
- Country:** United States
- Tax ID (EIN):** 12-3456788

At the bottom, there are 'Site Joins' (Enabled) and 'Organization Logo' sections, each with a 'Change' link.

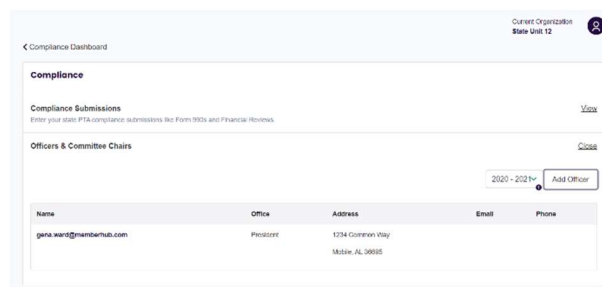
3. You can also upload your Organization Logo here to appear in messages, in your store, and on your website.

## Updating your Officer Information

You will need to enter your PTA Officers into MemberHub each year if not already entered by your State PTA. Follow these steps to enter your officers.

**Note:** After June 30, past year officer information **SHOULD NOT** be updated or removed. Prior year officer information should remain in MemberHub for state-level PTA data records, therefore you should **NOT** delete past officer information.

1. As a site admin, you will see the Compliance menu on the left side menu. Click on the **Compliance** option and then select **Update Officers**.
2. Click Add Officer to add the new officers for the current year. If adding for a future year, be sure to select the future year first before clicking Add Officer.



3. Enter the officer's information. If entering an officer with a PTA email that is shared year to year, be sure to NOT select the options from the drop down when entering the email. Enter the new officer's name. PTA emails should **NOT** have a display name in their profile in order to avoid any issues when adding officers with PTA emails.

**Officer Information** ✕

Title \*

Add as Organization Admin

2020 - 2021  Expire role at year end

Email Address \*

First Name \*  Last Name \*

Street Address  
 Address   
 Address 2

City

State  Zip

Country

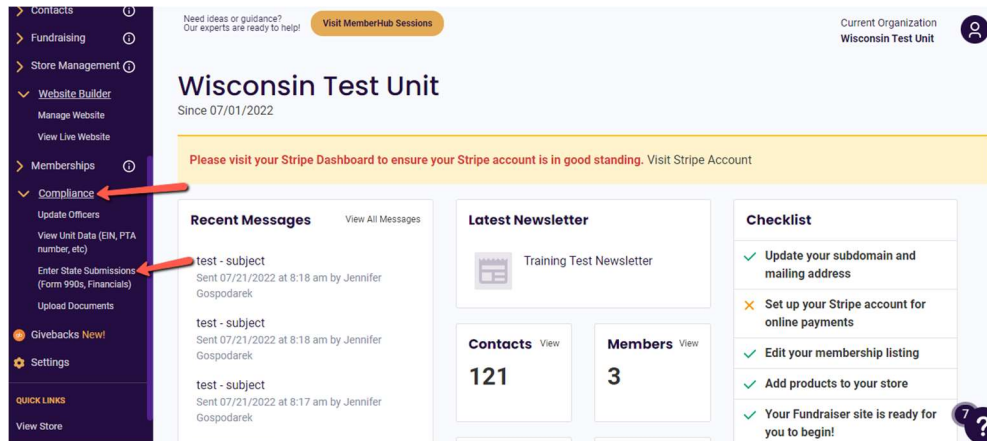
Phone Number

4. Officers are defaulted to be Organization Admin. If you do not wish to make the officer an administrator, you will need to toggle the switch to not make them an admin when adding them as an officer.
5. Click **Save** to save the Officer Record.

## Entering State Compliance Submissions

Within MemberHub, you can submit your compliance requirements to your State PTA.

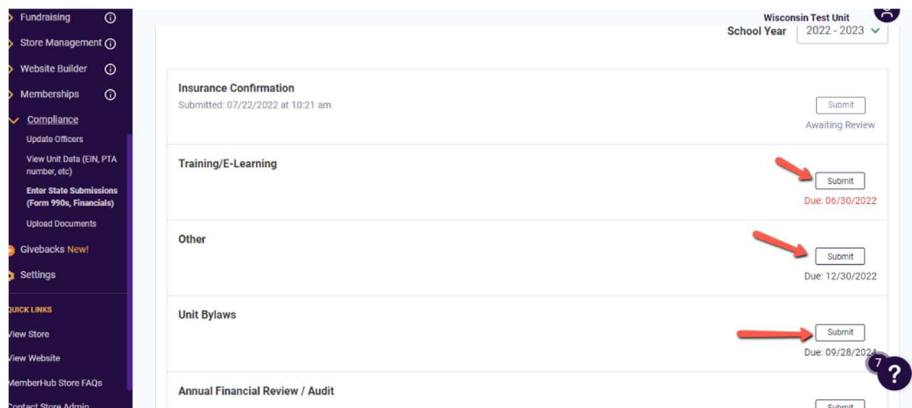
Specific requirements vary state to state, but all PTA's can submit their required compliance information by going to **Compliance** and clicking **Enter State Submissions**.



This is the section where you would submit each of your different areas of compliance. These areas may be similar to the ones listed below.

- Insurance Confirmation
- ByLaws Submission
- Form 990 filing confirmation
- Audit/Financial Review
- Budget
- Training
- State Forms

You should always enter your submissions for the current year that it was completed, not the year it was for. Example, you would submit the audit and 990 forms for the 2021 year that ended on 6/30/21 under the 2021-22 year since this is the year these tasks are completed. You would do the same for Insurance.





Immediately after submitting your compliance submission, you will see that the status is now Awaiting Review. Once it is reviewed by your State PTA, you will receive an email notification that it was approved or rejected. If it was rejected, your State PTA will likely provide a reason with this notification as well.

When your submission is rejected, you will need to resubmit to review. To resubmit a rejected submission, you must first archive the submission. To archive the rejected submission, you will need to click on it like you are viewing it. Scroll down to the bottom of the form and click the Red Archive Button.

Submitted at 08/19/2021 at 8:05 am

Rejected at 08/24/2021 at 8:43 am

Resubmit

Close

Archive

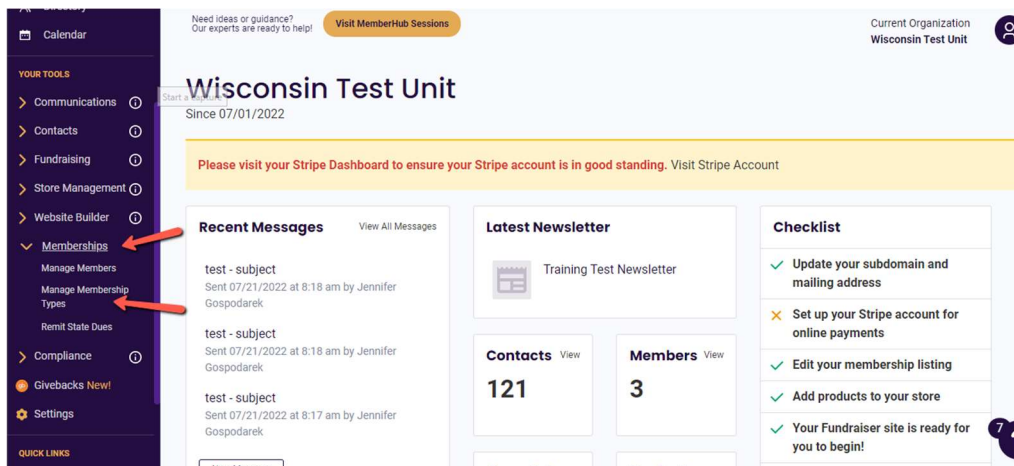
**Please Note:** Your State PTA may have additional requirements not listed in this article. If you have any further questions on this, please reach out to your State PTA leaders to inquire. If you are not sure who to contact, please reach out to [support@memberhub.com](mailto:support@memberhub.com) and we can assist you.

Some compliance areas require a document to be uploaded with the submission. This is all done in one step with the submission. To view or access the documents once they are submitted, you can locate them within **Compliance** under **Upload Documents**. *This is **NOT** where you would go to submit your compliance to your State PTA.*

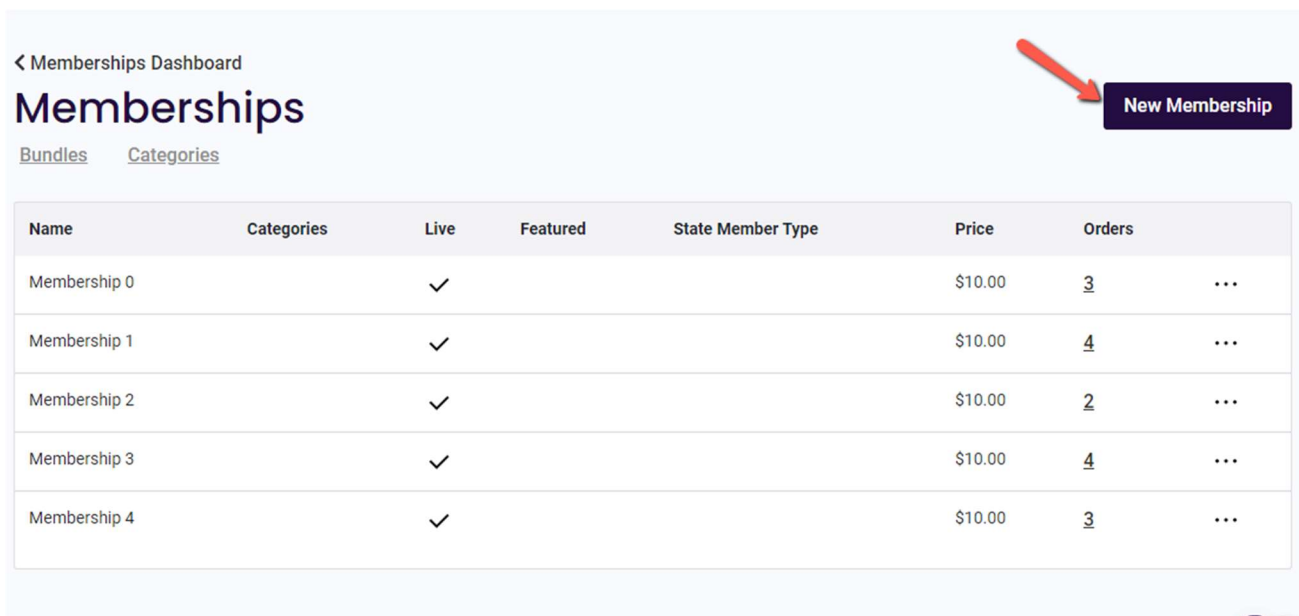
## Memberships: Setting up your Membership Types

The first step in using MemberHub for memberships is to set up your Membership types within the site. To do this, follow these steps.

1. Click on **Memberships** and then **Manage Membership Types**.

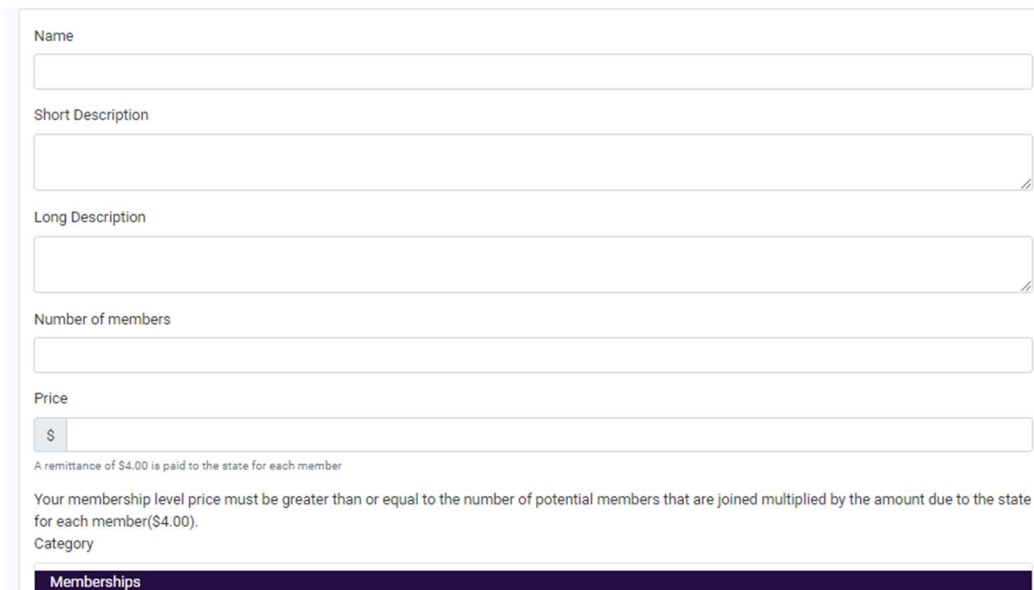


**Note:** Your standard state membership types will be listed here. You can edit the prices for these memberships to be more than your state dues but you are not able to change the names of these membership types.



2. Click **New Membership** to create a custom new membership or click on the 3 dots for an existing membership and click Edit Membership to edit the price for the membership and add additional details.
3. Enter the Membership Name, Short Description, Long Description, Number of Members and the Price.

**Note:** Your membership level price must be greater than the number of potential members that are joined multiplied by the amount do to the State PTA for each member. (\$4 in the below example but your State PTA may charge a different price).



Name

Short Description

Long Description

Number of members

Price

\$

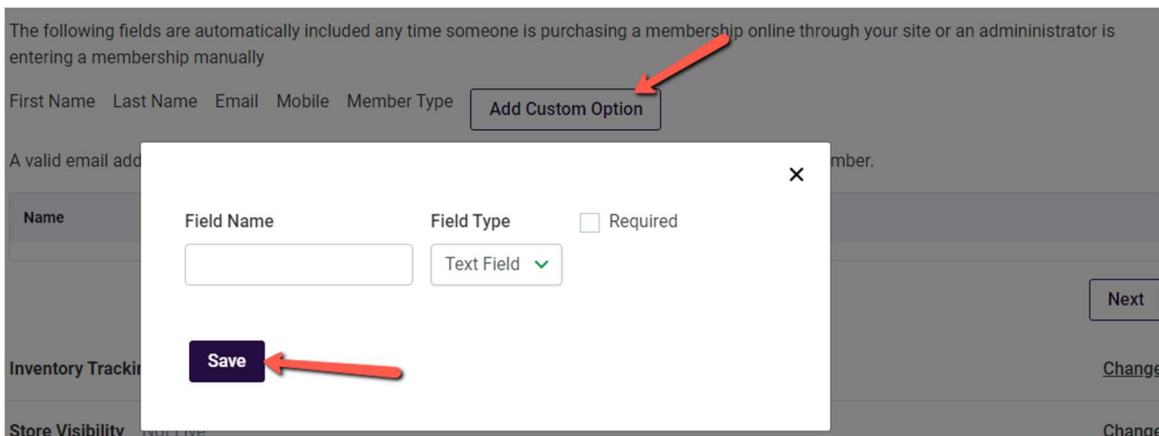
A remittance of \$4.00 is paid to the state for each member

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**

- All memberships require the following fields of Name, phone number OR email address, and membership type. Student memberships only require a name and will not require a phone number or email as long as the member type is Student. You can add additional fields by clicking **Change** next to the section for **Additional Fields**.
- Click Add Custom Option and then fill in the information and click Save.



The following fields are automatically included any time someone is purchasing a membership online through your site or an administrator is entering a membership manually

First Name Last Name Email Mobile Member Type **Add Custom Option**

A valid email address is required for all members.

Name

Field Name

Field Type

Text Field

Required

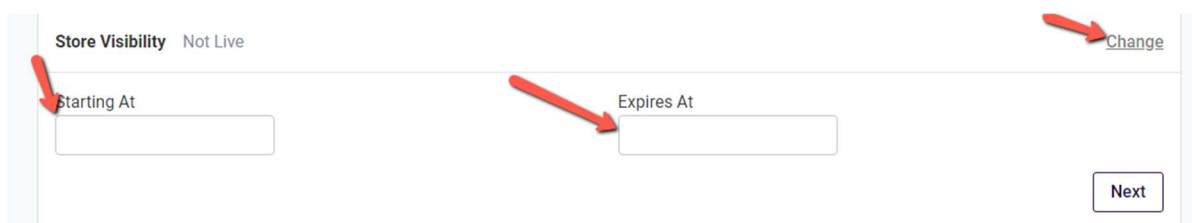
**Save**

Next

Change

Change

- If you wish to give the membership and expiration date or make it live at a later date, click Change next to Store Visibility and enter dates.



Store Visibility Not Live **Change**

Starting At

Expires At

Next

- Add photos to your Membership. Click **Add** next to **Photos** and **Add Image**.

Photos [Add](#)

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

Next <sup>2</sup> ?

8. Be sure to click Save in the top right of the page to save all of your work.

< Memberships [Save](#)

## New Membership

---

Details [Add](#)

---

Additional Fields [Change](#)

## Selling Memberships (or other items) in your MemberHub Store

In order to receive proceeds from memberships, spirit wear or other items you sell in your store, your MemberHub fundraiser or even your Givebacks fundraising, you need to have a connected Stripe Express Account.

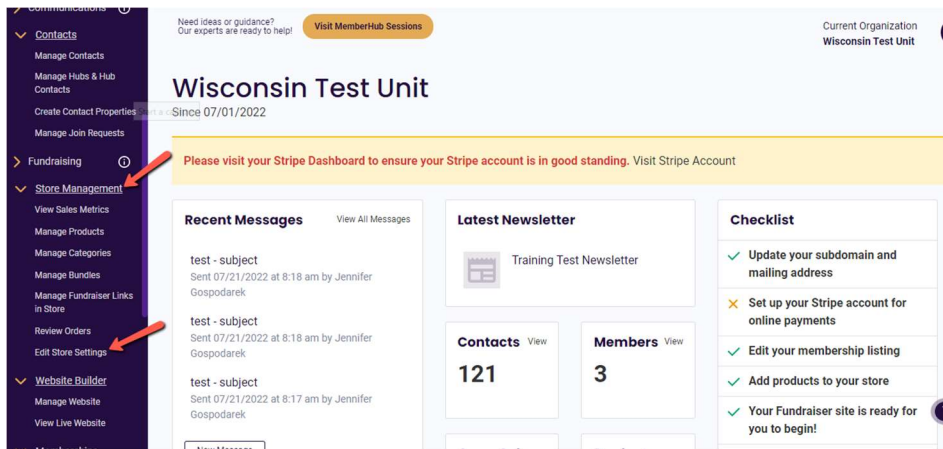
**YOU WILL NEED TO TRANSFER YOUR STRIPE ACCOUNT TO A NEW OFFICER ONCE YOU ARE NO LONGER WITH YOUR PTA. IT IS VERY IMPORTANT THAT THIS IS NOT MISSED DURING OFFICER TRANSITION.**

Setting up payment processing for your account is quick and easy. It's the way you will receive all funds in MemberHub. All you'll need to get started is an email address, your organization's EIN, and banking details.

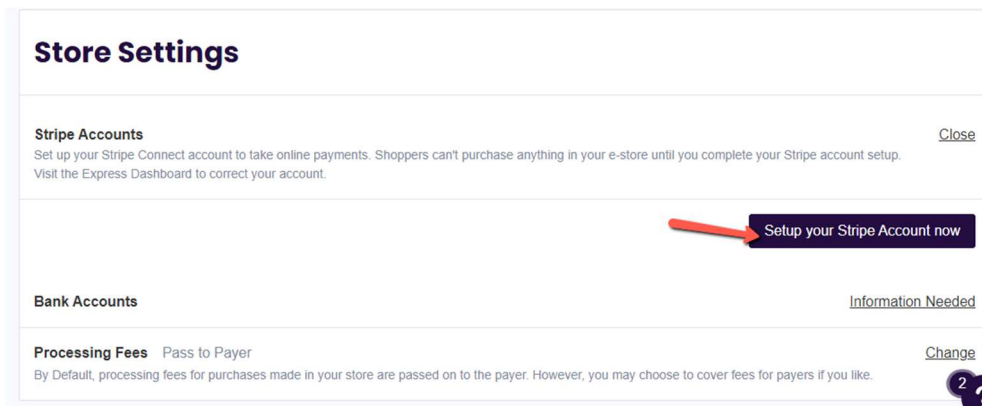
**Note: This should be completed by a person who is a signer on your organization's bank account.**

**Note: This process is the same whether you have an existing Stripe account you use outside of MemberHub since this is an Express account and not your typical Stripe account.**

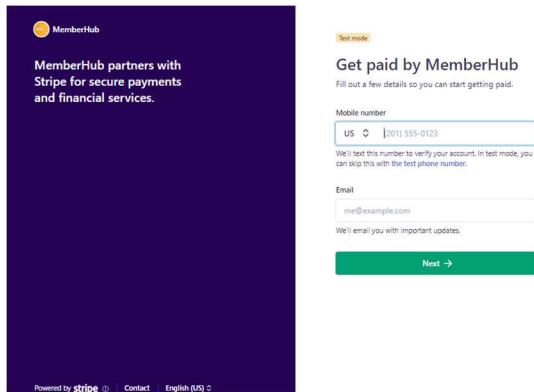
1. From the left menu under **Store Management**, click **Edit Store Settings**.



2. Click Set up your Stripe Account now.



3. Enter your Cell Phone Number and Email address. In order to avoid any potential issues, be sure to use a different email address for each stripe account.



MemberHub partners with Stripe for secure payments and financial services.

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**Text mode**

### Get paid by MemberHub

Fill out a few details so you can start getting paid.

Mobile number

US [011] 555-0123

We'll text this number to verify your account. In text mode, you can skip this with the text phone number.

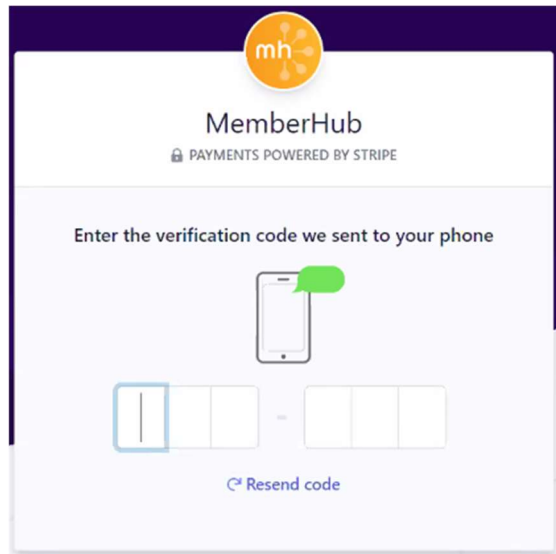
Email

me@example.com

We'll email you with important updates.

Next →

4. Enter the confirmation code you were sent via text and click Next.



MemberHub

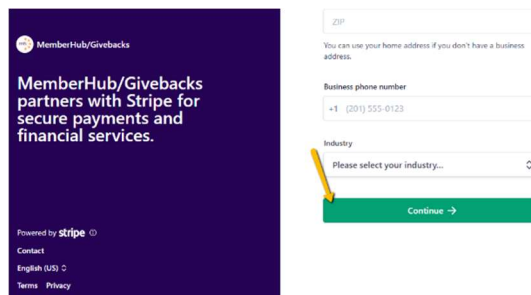
Payments Powered by Stripe

Enter the verification code we sent to your phone

Resend code

5. Fill in the form and click Continue at the bottom. You will be prompted to enter the following information about yourself as well as your organization.

- Legal Business Name (*this MUST be what matches your EIN with the IRS; often your State PTA*)
- EIN
- DBA (*This can be your local unit PTA since the Legal Business name may be different*)
- Business Address
- Business Phone Number



MemberHub/Givebacks partners with Stripe for secure payments and financial services.

Powered by stripe | Contact | English (US) | Terms | Privacy

ZIP

You can use your home address if you don't have a business address.

Business phone number

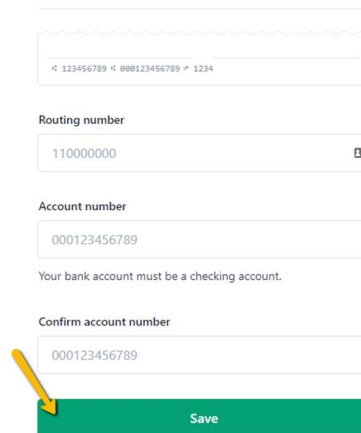
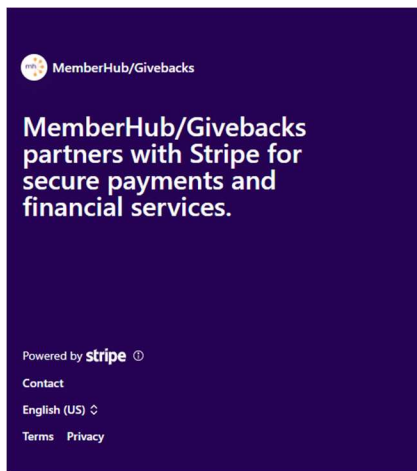
+1 (201) 555-0123

Industry

Please select your industry...

Continue →

6. Enter your legal representative's information (this should be someone who is a check signer on the account; preferably the President/Treasurer)
  - First and Last Name
  - Email Address
  - Job Title (Officer Status)
  - Date of Birth
  - Mailing Address
  - Phone Number
  - Last 4 digits of Social Security Number.
7. Enter banking details. Do not enter a debit card even though you do see this as an option. Debit cards have limits with transfers and will require you to come back and update once you reach this limit for transfers. If you have online banking, you can select your bank and login to your online banking account to link the account.
  - Routing Number
  - Account Number
  - Confirm Account Number



Routing number  
110000000

Account number  
000123456789

Your bank account must be a checking account.

Confirm account number  
000123456789

Save

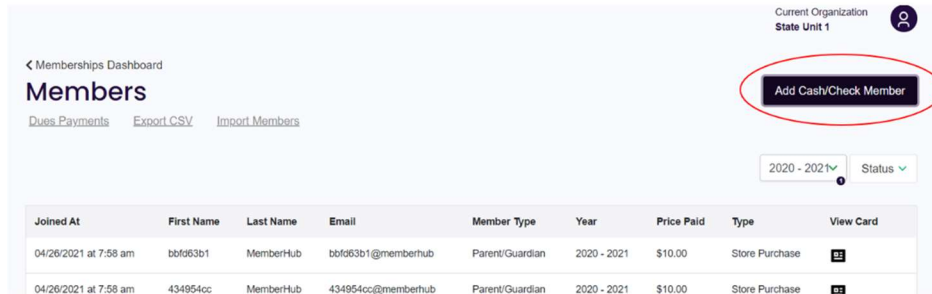
8. Once you confirm that the information is correct, click Submit.

You will then be taken back to your MemberHub store where you can see that your Stripe account is connected.

## Memberships sold by cash/check – manual entry

Ideally, you would want people to join your PTA using your MemberHub store so PTA members are automatically added to your MemberHub site and sent a receipt of their Membership, which includes a link to their membership card. However, if you would like to allow people to pay their dues by cash/check or some other system outside of MemberHub, you will need to manually enter those members.

1. Go to Memberships and click Manage Memberships. From here, you will click Add Cash/check member.



2. Select the membership that was purchased.
3. Enter the payment information for the membership order (price paid and check number). **Note:** For cash payments, leave the check number blank.
4. Enter the membership details for each member. Any required custom fields along with the members name, email, phone and membership type. Click Save.
5. If the member has a valid email address, they will receive an email receipt with a link to their membership card. If you don't wish to send them a receipt, you can select to not send a receipt.
6. After adding the member, you will be automatically 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.



## Memberships Sold by Cash/Check – Bulk Import

You may have the ability to import memberships into your site in bulk. If you do, you can follow these steps to import your memberships in bulk that were paid by cash/check outside of your MemberHub store.

**NOTE:** *Not all PTA's have the ability to import memberships into their site directly. If you don't see the ability to import memberships, please contact your State PTA for assistance with importing your memberships if you don't wish to add them manually.*

**IMPORTANT:** Before starting an import, be sure you are logged in to MemberHub using an email address where you receive emails since import results will be emailed to you.

1. Within your MemberHub site, click on **Memberships** and select **Manage Members**.
2. Click the **Import Members** link on this page.
3. Click **Download Template** to download a template for the data.
4. Enter the information into the template without adjusting/editing any headers. Do not add any additional columns since the import will only allow what is currently on the template.
  - a. First Name
  - b. Last Name
  - c. Email – **MUST BE UNIQUE. MEMBERSHIPS CAN NOT SHARE EMAIL ADDRESSES. NOT REQUIRED IF PHONE NUMBER IS ENTERED OR MEMBER TYPE IS STUDENT.**
  - d. Phone Number – **NOT REQUIRED IF EMAIL IS PROVIDED, OR IF MEMBER TYPE IS STUDENT.**
  - e. Member Type – **MUST BE ONE OF YOUR STATE MEMBER TYPES AS LISTED UNDER MEMBERSHIPS>MANAGE MEMBERSHIP TYPES**
  - f. Year Ending – **MUST ONLY BE 4 DIGITS FOR THE END OF THE MEMBERSHIP YEAR. EX: 2023 FOR THE 2022-23 YEAR.**
5. Upload the completed file (keeping it as a CSV file – NOT EXCEL)

Results will be emailed to you once the import is complete. You will need to click the link in the email to download the results file and see the reason for any errors.

**NOTE:** Importing memberships is solely to get the members listed in your site for your dues remittance to your state PTA. Imported members will show as \$0 cash paid and will not receive email receipts with their membership card. If you wish to have memberships receive emails with their membership card, you will need to add them manually rather than importing them in bulk.

## Paying your State Dues

You can pay your state dues directly to your State PTA through MemberHub by ACH. *This process is not connected to your Stripe account you have set up to take payments in MemberHub.*

As your memberships have been added to the list under Memberships>Manage Members, the site automatically calculates your balance for what you will owe your State PTA and will show what your balance is for however many members you have listed.

**Note: There is a \$1 fee to process your ACH payment and a \$4 fee for any failed ACH payments (charged by Stripe).**

Only the current year President/Treasurer can remit state dues; determined by the email you are logging into MemberHub with as well as the email listed for you as such officer under Compliance>Update Officers.

1. Go to **Memberships** and click **Remit State Dues**.
2. Click **Send ACH Payment**



3. Enter your banking details, being very cautious to enter the correct numbers into the correct fields both times. You may also choose to save your bank information so that you do not need to enter each time you remit your state dues.

### Confirm your Banking Details ×

Account Holder Name

Account Number



Confirm Account Number



Routing Number



Confirm Routing Number



Account Holder Type

Please securely tokenize my bank account details in Stripe so I don't have to enter it every time remit dues.

Save Banking Details

Close

4. Once you confirm the payment, you will then see the payment on your Dues Payment screen, indicating status and details for the payment.
5. If you do not see your submitted payment on this list, please contact Support for assistance before submitting a payment again.
6. You can see all of your payments listed on this screen. For paper records, you can print this screen and circle your most recent payment to file.

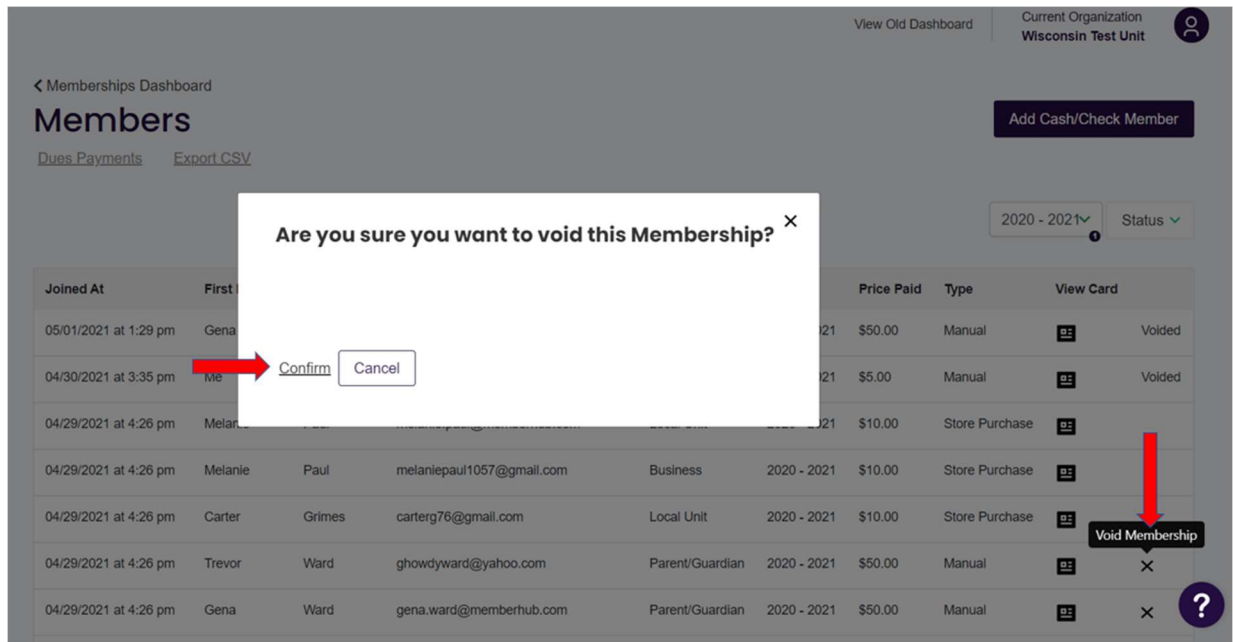
If your payment fails, this is typically due to a closed bank account that was saved during a previous payment, or the bank information entered was in error. You can contact support to find out the reason for the failed payment. You will still need to remit a new payment in addition to the \$4 fee for the previously failed payment.

If you have a new bank account, it is **VERY IMPORTANT** that you contact MemberHub Support to delete the saved bank information before submitting a new dues payment.

## Voiding/Editing a PTA Membership

Administrators can void cash/check memberships within the Memberships area. This will allow you to edit PTA membership entries by first voiding a membership and then re-entering it with the correct information.

Go to **Memberships** and select **Manage Members**. Locate the membership in the list and click the X to the right of the membership. Click Confirm that you want to void the membership.



The screenshot shows the 'Memberships Dashboard' with a table of members. A modal dialog is open, asking 'Are you sure you want to void this Membership?'. The dialog has 'Confirm' and 'Cancel' buttons. A red arrow points from the 'Confirm' button to the 'Confirm' button in the dialog. Another red arrow points from the 'Void Membership' button in the table to the 'Void Membership' button in the dialog.

Joined At	First	Last	Price Paid	Type	Status	View Card
05/01/2021 at 1:29 pm	Gena		\$50.00	Manual	Voided	
04/30/2021 at 3:35 pm	Me		\$5.00	Manual	Voided	
04/29/2021 at 4:26 pm	Melanie		\$10.00	Store Purchase		
04/29/2021 at 4:26 pm	Melanie	Paul	\$10.00	Store Purchase		
04/29/2021 at 4:26 pm	Carter	Grimes	\$10.00	Store Purchase		
04/29/2021 at 4:26 pm	Trevor	Ward	\$50.00	Manual		
04/29/2021 at 4:26 pm	Gena	Ward	\$50.00	Manual		

The star, the membership card, and the dues owed to your State PTA for that member will be removed from the site for that person's membership profile.

Afterward, you will then be able to re-enter the person by clicking **Add Cash/Check Member** in order to give them an updated membership.

Memberships sold in the store need to be edited by a MemberHub Staff for you. You may contact MemberHub Support at [support@MemberHub.com](mailto:support@MemberHub.com) for assistance.

## Membership Cards: Printing & Emailing

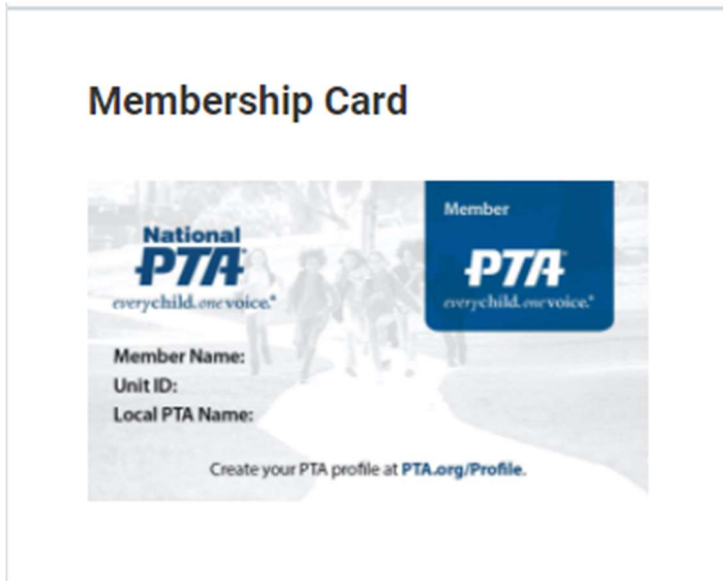
When people join your PTA, a membership card is linked to their MemberHub profile for your organization.

*Note: Only Site admin can see everyone's cards. Each member can only see their own card.*

You can access membership cards within Contacts or Memberships.

### Contacts

1. Go to **Contacts** and click **Manage Contacts**.
2. In the list of contacts, click on the person's name to view their profile.
3. Along the right side, you will see their membership card.



4. Click on the card image and the card will open in a new window.
5. You can print the card from this window.
6. To email the card, you will need to right click on a PC or two-finger click on a Mac and then click Save Image As.
7. Save the Image on your device and then you can create an email and send the membership card in an attachment.

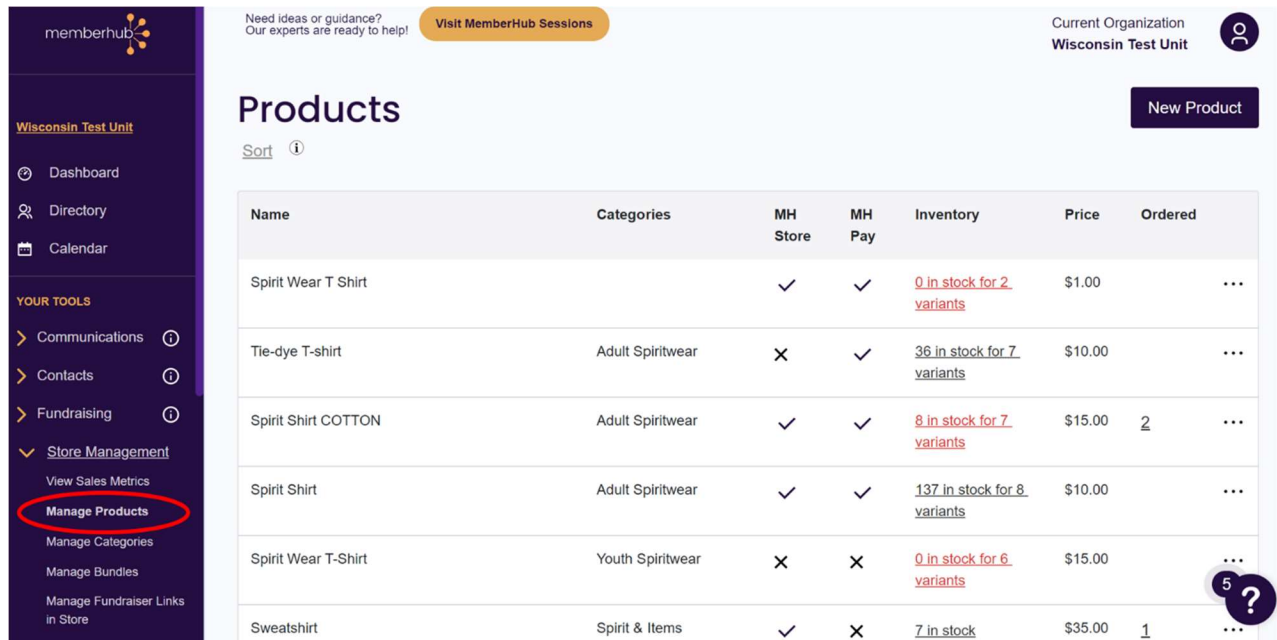
### Memberships

1. Go to **Memberships** and select **Manage Members**.
2. Find the person in your list of Memberships.
3. Click on the Membership card icon on the line next to the members name (far right).
4. The card opens in a new tab. From here you can use the browser print option to print the card.
5. To email the card, you will need to right click on a PC or two-finger click on a Mac and then click Save Image as...
6. Save the image to on your device and then you can create an email and send the membership card in an attachment.

## Selling other Products in your Store

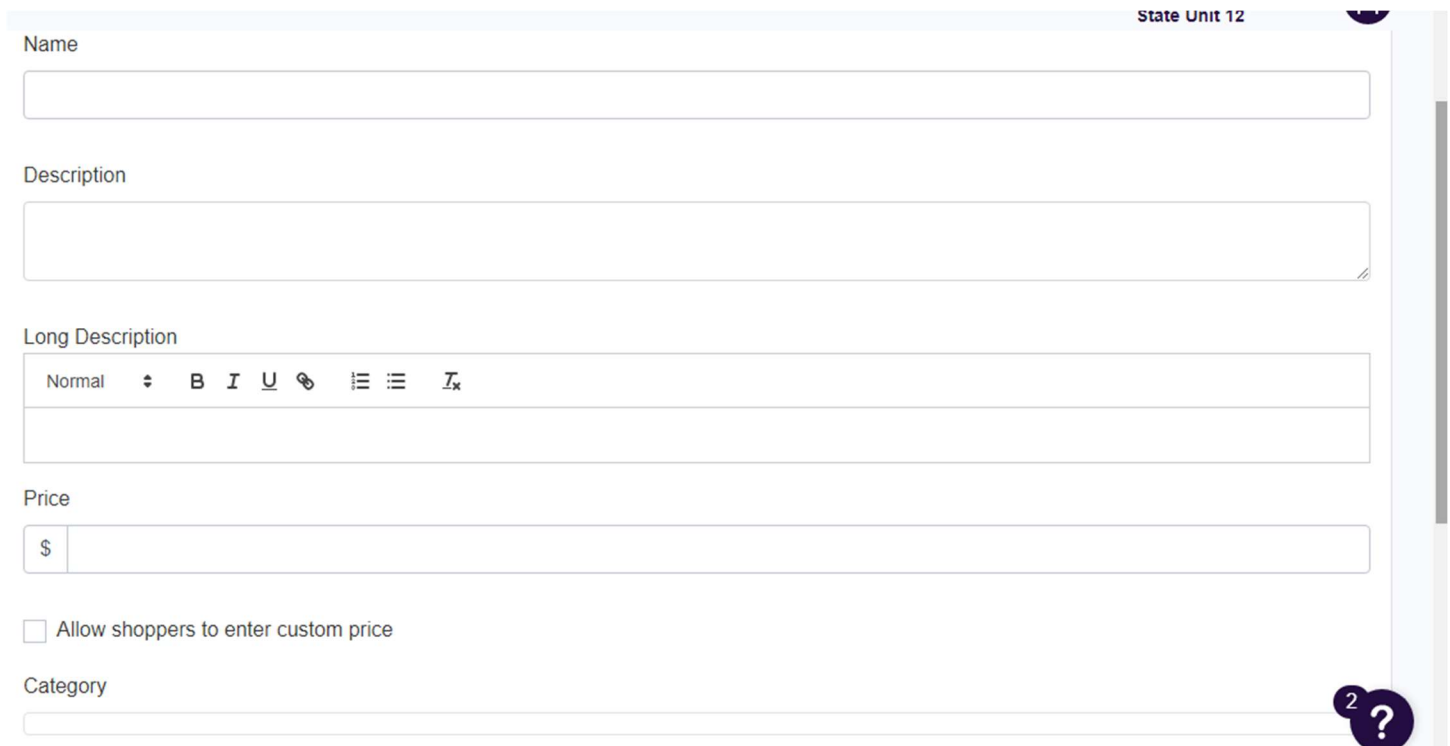
To add a product to your store that is not Membership, follow these steps.

1. Within **Store Management**, click on **Manage Products**.
2. Click the **New Product** button in the top right of your screen.



The screenshot shows the MemberHub interface. On the left is a dark sidebar with a navigation menu. The 'Store Management' section is expanded, and 'Manage Products' is highlighted with a red circle. The main content area is titled 'Products' and features a 'New Product' button in the top right. Below the title is a table with columns: Name, Categories, MH Store, MH Pay, Inventory, Price, and Ordered. The table lists several products, including 'Spirit Wear T Shirt', 'Tie-dye T-shirt', 'Spirit Shirt COTTON', 'Spirit Shirt', 'Spirit Wear T-Shirt', and 'Sweatshirt'. A blue callout bubble with a question mark and the number '5' is positioned near the bottom right of the table.

3. Enter the required information for the product: Name, Short Description, Long Description, and Price. Shoppers can name their own price when you check the box to Allow Shoppers to enter custom price and then set a minimum amount.

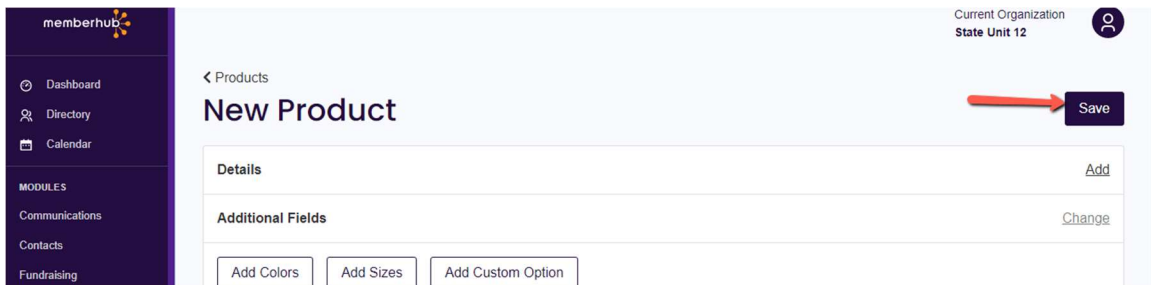


The screenshot shows the 'Add Product' form. At the top right, it says 'State Unit 12'. The form has the following fields and options:

- Name:** A text input field.
- Description:** A text input field.
- Long Description:** A rich text editor with a toolbar containing options for Normal, Bold (B), Italic (I), Underline (U), Link, List, and Unlink.
- Price:** A text input field with a '\$' symbol on the left.
- Allow shoppers to enter custom price
- Category:** A text input field.

A blue callout bubble with a question mark and the number '2' is located at the bottom right of the form.

4. Select a category for your product. You can create as many categories as you wish in your store and set as many categories as you wish for a product as well.
5. If you wish to capture more information from your buyers, you can add Additional fields.
6. Turn on Inventory or turn it off. This is only if you have a limited amount of a product and do not want to sell what you don't have on hand.
7. Adjust the store visibility of the product.
8. Give your shoppers a visual by uploading images of the product.
9. When you are done, you can go back to the top and click Save in the upper right corner.



You can also manage your products visibility from the products page. When viewing the list of products under Store Management>Manage Products, you can see 2 columns; MH Store and MH Pay. If there is a check in this column, the product is visible in the store or the MH Pay app, respectively. If there is a X, the product is hidden. To edit the visibility, click on the X or checkmark and edit accordingly.

### Editing Store Visibility ✕

Available At:

Expires At:

Feature this product

Hide product in store

## What's Next?

Now that you have set up your MemberHub site for compliance and memberships, you are now set to explore the many other features of MemberHub like Fundraising, Communications, and Givebacks.

[Check out our library of Support Articles.](#)

[Book a Fundraiser Meeting](#)

[Book a Givebacks Meeting](#)

[Learn how to use MemberHub for communications and more!!](#)