MemberHub
Unit
Training Manual
Table of Contents

Welcome to MemberHub ............................................................................................... Page 3

First -Time Login / Creating Your MemberHub account ............................................... Page 5 - 7
  First -Time Login ........................................................................................................ Page 5
  Activate Site & Set Domain Name ........................................................................ Page 6
  Access Rights ......................................................................................................... Page 7

Add / Update Officers ................................................................................................ Page 8

Adding People to MemberHub Account ......................................................................... Page 10 – 13
  Adding People Individually .................................................................................... Page 10
  Importing a Contact List ........................................................................................ Page 10 – 11
  Set-up a Site Joins Page ........................................................................................ Page 11 – 13

Document Membership Payments .................................................................................. Page 14
  Cash/Check Payments ............................................................................................ Page 14
  Credit/Debit Card Payments .................................................................................. Page 14

Setting Up Your MemberHub Store ............................................................................... Page 15 – 16

Adding Membership Types to Your Store ................................................................ Page 17 – 18
Adding Items and Donation Option to Your Store .................................................... Page 19

How to Void/Edit a Transaction & PTA Membership .................................................. Page 20

Printing and Emailing Membership Cards .................................................................. Page 21

Submitting Membership Dues to Kansas PTA (e-check) ................................................ Page 22 – 27

Hubs ........................................................................................................................ Page 28 – 33
  Home Page ......................................................................................................... Page 28 – 29
  Messages ............................................................................................................. Page 29
  Calendar.............................................................................................................. Page 29
  Members.............................................................................................................. Page 29
  Photos ................................................................................................................ Page 29
  Whiteboards ..................................................................................................... Page 29
Welcome to MemberHub

Kansas 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.

Starting with the 2019 – 2020 school year, MemberHub will be required for all local unit PTAs regarding Kansas PTA compliance (payment of membership dues to Kansas/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. Kansas PTA needs member data to report to National PTA and to communicate directly with PTA members. MemberHub does not communicate directly with members.

Please note: You must use GOOGLE CHROME as your browser on a computer for accessing MemberHub or WePay as an admin to avoid any issues!
First-Time Login / Creating Your MemberHub account:

First-Time Log-In

I. To access the MemberHub website for the first time, go to: app.memberhub.com/login:

- Enter your **personal** email address (email recognized by Kansas PTA)
- Select **I need to create a password** and enter your first and last name
- Next

- MemberHub sends you a confirmation email with an access code (first time login only)
- Enter the code from the email in the confirmation code box on the MemberHub site
- Create a password for yourself
- Next

Once in the site, you should see an **Admin Console** button in the upper right. If not, please contact your state PTA.
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.

- 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.’
Assigning Access Rights:

Access Rights:

When setting up the officers in MemberHub, the PTA President will determine who will have “Admin Console and Store Admin” access – the ability to add/change/delete information in MemberHub as well as access reports and submit dues directly to Kansas PTA.

Admin Console rights provide access to the following tabs:

- **PTA**: enter members, officers, audit, financial review and/or Form 990 confirmations
- **People**: search people and add students and parents to your site to receive communications
- **Hubs**: create hubs to match your Unit/Council or school’s communication needs
- **Site Joins**: set up a page for members of your Unit/Council or school community to become part of your site
- **Settings**: customize your site to reflect your Unit/Council or school spirit and organization
- **SponsorShare**: learn how to raise money with this sponsorship fundraiser!
- **Store Admin**: Access your store admin, complete your Merchant Processing Agreement or log in to your WePay Merchant center.

Kansas PTA assigns PTA Presidents with “Admin Console and Store Admin” rights.

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.

Kansas PTA will have ‘admin rights’ on all Kansas PTA units, councils and regions.
Add / Update Officers:

1) Login to the PTA MemberHub site (app.MemberHub.com).
2) Select the Admin Console button in the upper right
3) At the PTA tab:
   a. Click on Officers (on the right)
   b. To Add Officers:
      i. Click Add Officer (on left, under “Officer List”)
      ii. In the popup, enter officer’s details:
         • First & last name
         • Personal email address – see below regarding email.
         • PTA ‘Office’ position
         • Term - select 2019-2020 (current fiscal year)
      iii. Check whether to give him/her ‘admin’ rights
      iv. Click the Add Officer button (on the bottom).
      v. Complete this process for each officer

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. It is up to the new administrators to remove old admins as needed. This can be done in Admin > Settings > Administrators.

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.

- Remember to log in and out of each profile, depending on what you need to do.

- If you have already been added to MemberHub using only your generic or PTA-owned email address and:
  - Someone else in your unit already has admin rights:
    - Have them to change your email address in (Admin > People) BEFORE you attempt logging in for the first time.
  - If no one else in your unit currently has admin rights:
- After logging in for the first time and confirming your account, please follow these instructions to change it to your personal email address.
- After making your personal email the primary, remove the old one from your account. This will allow you to add a new person using the generic email address, if you want.
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**: Once people have been added to your site, they still need to be entered as members. This requires the person to be added as a ‘member’ on the PTA> Add Members (see page 14). By entering them in the PTA tab - Add Members, you are actually placing/confirming a transaction as well documenting how they paid. In addition, this transaction sets off a series of tasks such as membership card creation and emailed receipts. None of these things can happen until the payment is confirmed. So we need the actual transaction information versus just indicating a person is a member in their profile.

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 the Admin Console button in the upper right
3) At the People tab:
   a. Click on Add People (on the right)
   b. Enter required info for each person:
      i. Name
      ii. Phone 
      iii. Personal email
   (Note: Phone or email is required information for all members, except students).

**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 the Admin Console button in the upper right
3) At the People tab:
   c. Click on Import People (on the right)
   d. Click on Download Template (lower right)
   e. Complete the downloaded CSV file with contact data
f. Upload the completed file and click **Run Import** button

*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.*

---

1 **Download and Complete the Template**

Download the template and fill it out without adjusting the header row. The format of your data must match this exact format.

- Any Spreadsheet program like Excel can be used to edit and save a file in the .csv file format.
- The Email column must contain unique email addresses. Two people cannot share an email address.

2 **Upload Your Completed .csv File**

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.

1) Login to the PTA MemberHub site (app.MemberHub.com)
2) Select the **Admin Console** button in the upper right
3) Select **Site Joins**
4) Click the **Sites Joins Page Settings** button in the bottom right
5) Check Enable your Site Joins Page

Once you check that box, you'll see a handful of other options to configure. These options allow you to customize your Site Joins Page with instructions and contact information.

6) Click Save Changes

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:

7) 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 Join Requests

As people submit join requests, administrators are then required to process those requests. The requests will show up right on the Site Joins tab in the Admin Console.

Administrators can accept, reject, hold, or edit each request accordingly.

**Process Join Requests**

- **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.

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.

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!
How To Document Membership Payments in MemberHub

Membership payments can be made via cash, check and credit/debit card. 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 Kansas PTA

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

There are no fees from MemberHub for cash or check payments. For credit card fee information, refer to page 12.

**To Add A PTA Member - Cash/Check:**
1) Login to the PTA MemberHub site ([app.MemberHub.com](http://app.MemberHub.com))
2) Select the **Admin Console** button in the upper right
3) At the **PTA** tab:
   a. Click on **Members** (on the right under **PTA Pages**)
   b. Click on **Enter Members**
   c. Complete the information
      i. Name
      ii. Phone # and / or Personal email
   (Note: Phone or email is required information for all members, except students).
   d. Select the applicable **Member Type (Individual, Student, etc.)** from the dropdown
   e. Click on **Allow this person to join and access your MemberHub Site**
   f. Complete the payment information:
      i. School Year
      ii. Dues Amount
      iii. Extra Donation Amount (if applicable)
      iv. Check Number (if paid by check)
   g. Click on **Send Member an Email Receipt**
   h. Click on **Add Member**

Once a member is added, scroll down to the bottom of the page to see all the members that have been entered into your MemberHub site.

**To Add A PTA Member – Credit/Debit Card:**

An ‘e-store’ will need to be set-up to take sell memberships, collect donations, sell spirit wear and more online. Refer to the next Section, **Setting Up Your MemberHub Store.**
Setting Up Your MemberHub Store:

First, you will need to complete a Merchant Processing Agreement and register for a WePay or Stripe Account. The President or Treasurer has to ‘sign’ a Merchant Agreement using the PTA bank account information. S/He will need the PTA’s EIN and bank account information handy.

Once this information is entered online, the details are ‘hidden’ and are secure.

The WePay/Stripe login you create will be separate from your MemberHub login. It is recommended using a generic PTA email address for the WePay login, which will allow for easier transitions each year.

There are fees associated with credit card transactions. WePay/Stripe, the 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.

Who pays the fees with MemberHub?

Fees can either be paid by the PTA or passed on to the member (Refer to Store Settings tab to select who absorbs the fee).

Setting Up Your MemberHub Store:

1) Login to the PTA MemberHub site (app.MemberHub.com)
2) Select Admin Console > Store Admin
3) Click on Merchant Processing Agreement (right column)
4) Select Register for WePay or Stripe Account.
5) If your organization already has a WePay account, enter your sign-in and click Log In.
6) If new to WePay or Stripe, complete the sign-up form in the WePay or Stripe pop-up window
   a. You may use a generic PTA Treasurer email address if you wish, but the first and last name that you input in the form should be that of the individual who will be managing/owning the WePay account.
   b. The login credentials for your WePay/Stripe account are separate from your MemberHub login.
7) Read the Terms of Service and bookmark the link for future reference.
8) Confirm your email (sent to the email address provided), then click Next.
9) Enter the details of the PTA/PTSA:
   a. Entity Type: Nonprofit / Unincorporated Association
   b. Industry Type: Education
   c. Legal Organization Name – must match your unit name on your EIN
   d. Address & Phone: use school’s address and phone
   e. Website: use your PTA website. If you do not have one, then select My
      nonprofit has no web presence.
   f. Beneficial Owner: (Do you own 25% of the nonprofit) select No.
   g. Review details of agreement. Click Submit.

10) Enter details of the controller (Treasurer):
    a. Name, address, phone
    b. Enter last 4 digits of Social Security number. Federal law requires the
       bank (Chase) to verify your identity. Chase will try to do so using last 4
       digits of SS#.

11) Enter details of the bank account:
    a. Routing number: set of numbers located in lower left of check (9 digits)
    b. Account number: set of numbers located in middle of check
    c. Select applicable account: checking or savings
    d. Select Link Bank and Finish.
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) Click on the **Admin Console**
2) Click on the **Store Tab** to access the **MemberHub Store Admin Site**
3) Click on **Memberships** (left-hand side)
4) Your standard state membership types and a few other options will already be listed in the store.

5) Click **Edit** to adjust pricing and other details, if necessary.
6) To ‘Hide’ a type that is not applicable to your unit/school, click **Hide in Store?**
7) Another option is to customize PTA membership types and pricing for school store.
   a. Click on **New Custom/Bundled Memberships** in the top right
   b. Fill out 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 due to the state for each member ($4).

8) Enter an **Available At** and an **Expires At** date.
9) **Add an Image. 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.
10) Add **Additional Fields.** Choose the **Field name, Field type, and option values.**
11) Choose the School Year.
12) Click Add Membership. You should see the Memberships listed in your live store.
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 Admin Console > Store Admin Tab to access the MemberHub Store Admin Site
2) From the Dashboard of the MemberHub Store Admin Site click on Items on the far right, New Item (top far left)
3) 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.
4) Select the Category you want the item in.
5) If there are different sizes or colors check the Has Sizes or Has Colors boxes and add the sizes and colors.
6) Add an image
7) Add Additional Fields (optional)- Choose the Field name, type of field, and enter the optional values.
8) Choose the School Year.
9) Click Create a New Item.

Sample Store
How to Void/Edit a Transaction & PTA Membership

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

10) Click on the Admin Console > PTA tab > Members
11) Search for the incorrect membership in the search bar
12) Click on the X to the right of the membership
13) Click Void Membership

The yellow 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.

To re-enter that person into the PTA tab > Members > Add Members form in order to give them an updated membership.
**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 on the **Admin Console > People** tab
2) Click on the Person’s name to access his/her profile
3) In lower right-hand corner, you will see their membership card
4) Click on the link below 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, 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 prefer. Create an email and attach the membership card image to the email.
Submitting Membership Dues to Kansas PTA:

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

1). Login to MemberHub
2). Select Admin Console
3). Click on PTA tab
4). Click on State Payments (menu on the right)
5). System will display how much is owed to the state and for how many members.
6). To see which members are owed for, click on Show/Hide Members. All members with state dues outstanding will be listed at the bottom of the page.
7). The current President or Treasurer may remit dues via e-check, select Send Payments Via e-Check. The following pop-up will be displayed:

8). Check both check boxes to activate the Send Payment to Kansas PTA button. If they are both checked and the box is still grayed out, un-check the top check box and re-check it to make the box live.

Note: If your button is not ‘live’ and you are the president or treasurer there are a few things to check. First, go to the Admin Console > PTA tab > Officers and verify that you are listed as the current year officer (2020-2021) and not last year’s officer (2019-2020). If you are listed as a past officer, you will need to add yourself as a new officer for the
2020-2021 year. You cannot update or delete 2019-2020 officers after June 30th due to state record keeping needs. If you are listed as a current officer, the next step would be to verify you are logged in with the email listed on the 2020-2021 officer profile. If you are not, you will need to logout and login again with the email on the officer profile.

9). A pop-up from WePay is displayed. If you do not get a pop-up, check your Google Chrome settings to make sure pop-ups are not disabled.

10). If your PTA utilizes online banking:
- Hit **Continue**
- Search for your bank
- Enter your online banking user name and password. If you are getting an error that the login credentials are incorrect go back and check if your bank has a business integration with WePay. For example, logins for TD Bank Business Direct with not work if you are in the regular TB Bank option. You have to choose the business option.
• Once logged-in, a list of your active online banking accounts should be displayed.
• Select the account to use to pay this and all future payments from
• Continue
• Verify the bank information displayed and complete the process.
• Once completed, a confirmation number should be displayed on the MemberHub state payments screen. Your payment has now been sent to the state.

11). If your PTA does not utilize online banking (or WePay does not have an integration with your bank), you will have to manually confirm the account. FYI - When entering the bank information manually, WePay will make two small deposits in your PTA's bank account, which you will need to confirm to verify your account. Once you have done that, your ACH payment will be released.

To manually enter the bank information:
• At the WePay pop-up, click on Manually enter account and routing info.
Fill out the form in its entirety. If it is not accepting the bank name, the bank may have a special character in the name. For example, for M&T Bank, enter M and T.

Select Authorize Account

Displayed message: *WePay is going to make two small micro deposits into your bank account in 1-2 business days.* WePay will also send you an email with a link to enter the micro deposits. If you do not receive this email please check your spam.

Click the link in the email and log in to confirm the amounts.

Continue

A confirmation number for the payment is displayed. Note: your payment will not be sent until you confirm your micro deposits. If you do not get the micro deposits it is likely something you entered when you confirmed the account was incorrect. Please confirm it again. If you do not get the deposits the second time please reach out to MemberHub support.
• The account is now set-up. You only have to confirm the bank account on the first payment. Each additional payment only requires you to press the button to Send the Payment.

12). Once the eCheck is sent, a breakdown of all payments is available under State Payments History button.

Information regarding ‘Advanced Access Code’:

When using the WePay pop-up to send an eCheck state payment, you may get to a point where you're prompted to enter an ‘Advanced Access Code.’ This is an extra security measure that some banks use on their accounts in order to generate online transactions.

For example, Wells Fargo offers a feature called Advanced Access. According to Wells Fargo: When conducting online or mobile banking, Wells Fargo may sometimes prompt you to request an ‘access code’ to perform certain transactions or access sensitive information.

Please be aware of this setting with your bank and work directly with your bank on your ‘Advanced Access’ settings.

If logging into your bank through the WePay ACH popup continues to be a challenge just follow the screenshots noted on MemberHub website tutorial (https://support.memberhub.com/hc/en-us/articles/360006895253-How-to-pay-your-state-dues-in-MemberHub) to manually enter your bank account and routing information.
Also, WePay recommends logging-in to your bank account to decide if you'd like to disable 2-Step Verification.

(MemberHub tutorial link: https://support.memberhub.com/hc/en-us/articles/360006895253-How-to-pay-your-state-dues-in-MemberHub)
**Hubs**

Hubs are the primary place that you will connect with groups, organizations, classes, etc.

**Home Page**

The home page is the first page you will see when entering a hub. You can completely customize this page to suit the needs of your group. In addition to simply updating the word content, it's possible to embed an image or video and even edit the HTML for that page.

You should include information here that you want members to see when they enter the hub. Remember to include content welcoming new members as this may be the first time that they have been involved with MemberHub. Content on the home page can change as often as a hub administrator desires.

**Messages** [Instructions to Create and Send Messages](#)

Messages are split up between two options: **Announcements** and **Discussions**

**Announcements** are one-way messages to the entire group. They are designed for newsletters, general announcements and short, instant notifications like, “Ball game cancelled tonight because of weather.” Recipients of announcement messages can only reply to the sender.
An announcement can be received via e-mail or text message on your cell phone depending on your **Hub Settings - Personal Settings** in each hub.

By default, an administrator is the only person in the group allowed to post announcements.

**Discussions** allow email recipients to reply-all and all messages in the discussion will be saved in the hub. Discussion messages are received via email only. If you don’t want to receive discussion messages via email you can opt out in **Hub Settings - Personal Settings** in each hub.

Every hub has a custom email address. Sending an email to that address will automatically create a new discussion and record the thread in the hub. To discover the discussion board e-mail address for a particular hub, look in the sidebar of the **Messages** page.

**Calendar** [Instructions to Create a Calendar Event](#)

Every hub has a calendar where events related to the group can be posted. When creating an event you can choose to notify members of the event and **set up email or text message reminders** to be sent during the time leading up to the event. You can also choose to show the event on the Main Calendar.

If you use a desktop calendar application like Apple’s iCal or Microsoft Outlook you can subscribe to the iCalendar feed of a hub calendar and it will automatically import events from the hub into your personal calendar. You can view a list of applications that have support for the iCalendar protocol on Wikipedia [here](#).

**Members**

The members page lists all of the people who are directly affiliated with the hub. You can view the profiles of other members and thereby share up-to-date contact information. If the members are grouped by family, you can view a family profile as well as the profile of each family member.

**Photos** [Instructions to Upload Photos](#)

If you have pictures you would like to share with members of your hub, you can create a photo album and upload photos. This is a safe and secure way for you to share photos, rather than posting them in a public social networking site.

**Whiteboards** [Instructions to Use a Whiteboard](#)

Whiteboards are great way to collaborate with other members in your hub. Create whiteboards for your groups to brainstorm on a particular topic or share information you want to preserve in the hub. They are a great way for members to share ideas without flooding inboxes with emails from a Discussion.
**Signups**

Instructions to Create a Signup

You can create signups to for members to bring needed items or volunteer for time slots. Automatic reminders can be sent those who sign up.

**Hub Settings**

Instructions for Hub Administrators

You can access the settings for a hub from the **Hub Settings** button below the hub navigation. Hub admins will see six tabs in the Hub Settings area. Normal users only have access to the **Personal Settings** tab. Hub admins will only see Personal Settings in hubs in which they are members.

- General
- Admins
- Joins
- Permissions
- Profiles
- Personal Settings

Instructions for Adjusting Your Personal Settings

**Files**

Instructions to Upload Files

If you have documents or other files that you would like to share with members of your hub, you can upload them to the file repository. This is a safe and central location for the group to store documents.

- **Adding a File to Your Message**

  To add a file to a message you need to make sure you have the file link from the file section of MemberHub. All files must be hosted within MemberHub First.

  4) Login to the PTA MemberHub site (app.MemberHub.com).
  5) Select the **Admin Console** button in the upper right
  6) At the **Hubs** tab, select the Hub you want to message from:
     - **Click on Files** (on the left)
     - **Select Upload Files** (right)
7) Copy the link for the file underneath the file on the files tab.
8) Insert this link into the message
   a. Click Messages > New Message > Insert > Insert/Edit Link
9) Once you click **Insert Link**, insert the link in the **Url** box. The **Text to display** and **Title boxes** are not necessary.
10) This is what it will look like in the message. From here, you can finish your message as necessary by adding additional text, recipients etc.
**Privacy Settings**

If local units are concerned about people seeing their information, you may make it ‘private’.

1). Login to MemberHub  
2). Select **Admin Console**  
3) Click on **Setting > Features**  
4) Under **Directory**, select the applicable setting.

5) **Under Access**:  
   a. Select **Access** if want everyone in the entire directory to have access to everyone’s information.  
   b. If **Access** is not selected, the only people who will be able to access/see information are the officers.
MemberHub Givebacks

Givebacks makes it possible for local businesses to support your organization through everyday purchases by your supporters.

With your approval, businesses can list special offers in your e-store - things like $20 for $40 worth of pizza, or 30% off a summer camp session - exclusively for your community.

The best part: Up to 20% of every purchase goes right back to your organization.

Givebacks is included in your MemberHub account, and there's nothing you have to learn. It all happens in your MemberHub e-store. No extra work required. No strings attached. Seriously. Learn how to get started with Givebacks.

Get Started with Givebacks

To get started with MemberHub Givebacks, please follow these steps below.

1. Click the **Subscribe to MemberHub Givebacks** option on your Setup store checklist.

2. This will bring you to the Settings Page. Click the button to **Subscribe to Givebacks**.
4. From here, go back to the Givebacks page by clicking the Givebacks link on the left-hand side.

5. Any offers currently available to your unit will appear here. Hover over the items and click Add to Store to accept the items and offer them to your parents/members.

There is also a handy Show online offers only checkbox, if you want to view only offers from online merchants.

6. Next, recommend local businesses that your community loves. When you recommend businesses from your MemberHub account, our team will reach out to invite them to participate in Givebacks by placing special offers in your e-store.

- Use the Recommend Local Businesses button to search for the business name, then click Invite. If you have contact information for the business owner, add it here, but you don't have to have contact information to invite local businesses.
- MemberHub will do the work for you and invite recommended businesses to participate in Givebacks by placing special offers in your e-store.
- For each local business you recommend that signs up to place a Givebacks offer, your unit gets a $50 referral bonus!
7. Check back often to see if new offers have been added. **You're all set up!**

**Good To Know:**

- **You must add your organization's address to set up Givebacks/find local offers.** Usually, this will be completed for you, but if you notice your organization address is unchecked on your store setup checklist of the home page, be sure to click that link/visit the settings page on the left-hand side to update this.
- **Your unit will get up to 20% of all Givebacks sales donated back, just for subscribing and placing offers in your e-store!**
- **New Offer Thursdays:** New offers will be emailed to you (site admins) on Thursdays each week. You will have until Tuesday of the following week to add offers in your e-store or reject them before offers automatically go into your store.
- **Givebacks Tuesdays:** Your contacts will get automatic system notifications about your new offers each Tuesday.
- Shoppers can find all Givebacks offers in your e-store in the **Givebacks Offers** section.
- Find the instructions for redeeming an offer [here](#).
**MemberHub Fundraising**

Your eStore can be used for all sorts of online fundraisers. Selling spirit wear, no-fuss fundraisers, rent-the-rock, fun-runs...the possibilities are endless. In this section, please share your success stories, creative ideas, and questions.

How to register your organization on MemberHub Fundraisers

Registering your organization or group on MemberHub.gives takes just a few minutes. After you register, you’ll have the ability to apply your own branding, set up creative fundraising experiences, invite teammates, setup how to receive the funds raised, and configure a home page for your supporters.

1. Get started at app.memberhub.gives
2. Enter your email and click go
3. Search your organization name

Note: If you can't find the organization please reach out to us at support@memberhub.com

4. Click Start Fundraising - Your organization has been added!

5. On the next page, be sure to click setup payment processing and follow these steps to set up your stripe account. This is important so that you can accept payments for your fundraisers.

6. Add all your officers/ fellow administrators that should have access to create and edit your fundraisers. You can do this by going to users on the left-hand side of the screen. Step by step instructions can be found here.
Next steps

- Contact Stripe and request your non-profit processing fee rate ([learn more](#)).
- Complete your organization profile to add your logo, a description of your organization, social media links, and more! ([learn more](#)).
- Customize the look of your pages using our branding options to set your organization colors, custom header, subdomain and terminology. ([learn more](#)).
- If you have not already, Invite teammates to help manage your account. ([learn more](#)).
- Invite advocates to create fundraising campaigns on your behalf ([learn more](#)).
- Customize your supporter center and donation page(s). ([learn more](#)).