



memberplanet

Washington State PTA Checklist for Basic Membership Bulk (Using an Excel File)

The following is a simplified checklist to easily fulfill the WSPTA requirement that all local PTAs enter paid members into the membership database used by WSPTA. This checklist should be used if your PTA meets the following conditions:

- You intend to use **memberplanet** simply for reporting purposes, as you use an external tool (such as a spreadsheet or alternate database) to manage member information
- You will not be collecting online payments for membership through **memberplanet**
- You are comfortable using an Excel spreadsheet

- 1. Membership level setup (optional)
- 2. Add more membership levels (optional)
- 3. Download and complete the basic member load template
- 4. Upload Excel file
- 5. Assign membership

Before we begin:

It's important to understand that WSPTA records paid members based on **the number of memberships assigned**. This is a key distinction that will make more sense as you progress through this checklist. But, for the time being, please know that there are two primary goals: adding members to the database **and** assigning memberships to those members.

(Estimated time to complete: 20-30 minutes)

One last thing before we begin...

Your PTA might be best served by skipping Steps 1 & 2 below. Let's determine if that's the case.

memberplanet allows local PTAs to organize members using multiple tiers of memberships (e.g. Parent, Teacher, etc.). Some PTAs utilize this feature when reporting their members because they want to ensure the membership tiers in **memberplanet** reflect how they organize memberships outside of **memberplanet**. This is by no means a requirement - especially if you are just using **memberplanet** to report paid members. WSPTA and your local council (if applicable) will invoice all memberships the same, no matter what your levels are (i.e. parent memberships are invoiced the same as teacher memberships).

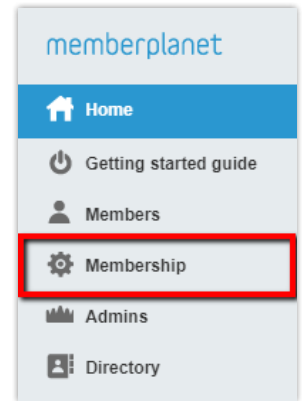
Is it important to you that what you enter into **memberplanet** reflects your PTA's multiple membership levels? Again, this is not a requirement, but some PTAs find it useful to organize information this way. If yes, **begin at Step 1.**

Are you just using **memberplanet** to report your paid members and you want the most seamless process to accomplish that goal? If yes, **skip Steps 1 & 2 and proceed directly to Step 3.**

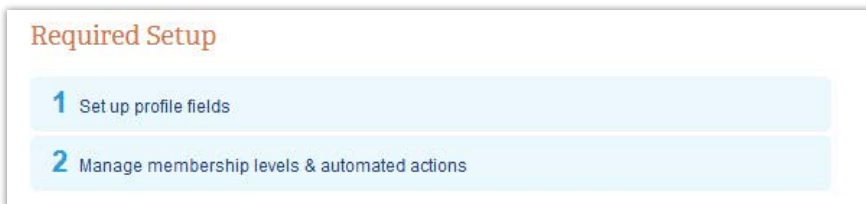
□ I. Membership Level Setup

You've chosen to utilize **memberplanet's** ability to create multiple membership levels. Good on you! For every local PTA, a single placeholder membership level has been set up by default. Let's update that one first and then add additional ones as needed.

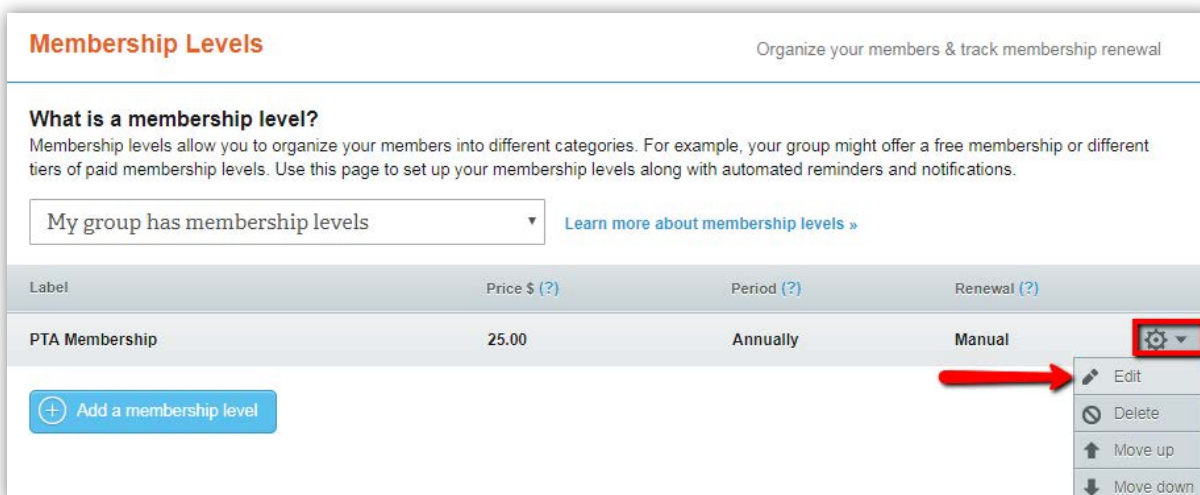
First, go to your **memberplanet** admin portal. On the left navigation sidebar, click **Membership**.



In the Required Setup section, select **2. Manage Membership Levels & Automated Actions**. The reason we are skipping the first option is because it relates only to PTAs that handle their member registration online. Even if this is an option you'd like to explore in the future, for the time being it's not applicable to our current goal of getting your memberships recorded. That's why we're skipping to option 2.



You will find yourself on the **Membership Levels** page. As mentioned, a default placeholder membership level has been set up and labeled "PTA Membership." Let's make this align with your local PTA's membership levels. Click the gear icon in the same row and select **Edit** from the dropdown menu.



Update the label and the price of the membership level to reflect what your local PTA uses. Please do not change the rest of the default settings, as doing so could cause major issues down the road.

Label	Price \$ (?)	Period (?)	Renewal (?)
<input type="text" value="PTA Membership"/>	<input type="text" value="Paid"/>	<input type="text" value="Annually"/>	<input type="text" value="Manual only"/>
	\$ <input type="text" value="18.00"/>	<input type="text" value="Specific date"/>	<input checked="" type="checkbox"/> Members cover fees (?)
		<input type="text" value="1st of Jul"/>	<input type="checkbox"/> Pro-rate payments (?)

Scroll down to the bottom of the page and click the **Save and Close** button.

Visibility (?)

Public - All members may choose this level

Private - Only specific members with an access code may choose this level

Congratulations! You have successfully created your first Membership Level. Let's add some more, shall we?

□ 2. Add More Membership Levels

Underneath the membership level you edited, click the **Add a Membership Level** button.

What is a membership level?
 Membership levels allow you to organize your members into different categories. For...
 tiers of paid membership levels. Use this page to set up your membership levels also...

My group has membership levels ▼ [Learn more](#)

Label	Price \$ (?)
Membership	16.00

+ Add a membership level

Fill in the **Level Title** or label, **Price**, and select **Annually** in the Period dropdown menu, then change **Based on join date** to **Specific date** and select **1st of Jul** from the addition field that appear. Again, these default settings are very important for the proper reporting of membership numbers, so please do not deviate from them.

The remainder of the fields can be ignored, as you are not using **memberplanet** to collect membership payments.

Label	Price \$ (?)	Period (?)	Renewal (?)
PTA Membership	16	Annually	Manual
Level title	Paid \$ 0	Annually Specific date 1st of Jul	Auto-pay or manual

Pro-rate payments (?)

Click the **Continue** button.

Repeat these steps to add more membership levels.

One important note: Please do not create a membership level with a free membership level, even if your local PTA offers subsidized memberships. The database will miscount anyone assigned to a free membership.

When finished, click **Save and Close** at the bottom of the page.

□ 3. Download and Complete the Basic Member Load Template

Click to [download the Basic Member Load Template](#). Open the template in Excel. You must keep the template saved as an Excel 97-2003 Workbook (*.xls). Updating it to a different version will cause uploading issues in the **memberplanet** database because of the conditional formatting.

As you fill in the template, it is important that you only include member data for **New Members**. Any **Returning Members** who were included in PT Avenue last year have already been rolled over into **memberplanet**.

Copy and paste the **first names, last names, and email addresses** of your **new members** from your roster to the template. TIP: To simplify the membership assignment process, ensure that the records you are importing are only of paid members - do not include nonmember family members or contacts.

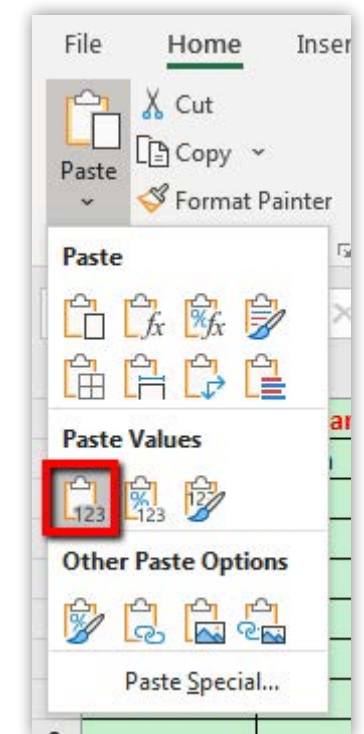
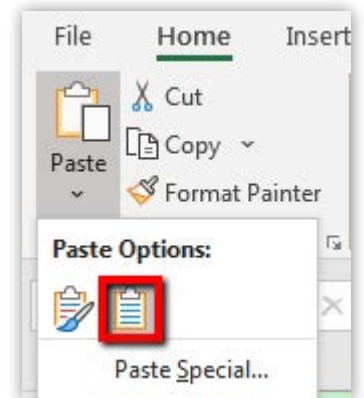
When you paste your data, use the paste option **Match Destination Formatting (clipboard icon)** or **Paste Values (clipboard icon with 123)**.

The template will automatically highlight any cell with a formatting or data error that needs to be corrected. Here are some common examples:

1. Duplicate Email addresses: Email addresses must be unique and in a valid format to be uploaded to **memberplanet**. This means that there will be issues if:
 - There are two or more instances of an email address (highlighted in red below). You'll need to replace/remove duplicate email addresses to ensure all email addresses in the template are unique. For members who share a single email address, the email address should only be included once. Leave the Email field blank for the additional member.

2. **Invalid characters or spaces:** The email address has spaces or unapproved characters (highlighted in orange below). Double-check to ensure everything is formatted correctly.

C	D	E	F
Email	Gender	BirthDate	MobilePhone
support@memberplanet.com	Male	1/1/1980	8882988845
smith@gmail.com	Male	2/2/1982	1234567789
andrews@yahoo.com	Female	3/3/1983	(123) 456-7890
andrews@yahoo.com	Female	3/3/1983	1234567890
jane@memberplanet.com			
sarah@memberplanet.com			

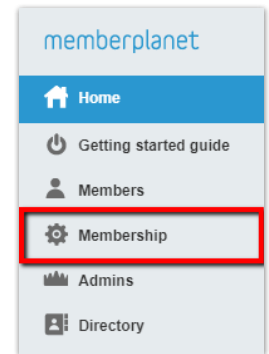


Correct any highlighted cells and save your file as an Excel 97-2003 Workbook (*.xls).

Note: memberplanet treats email addresses as unique identifiers of member records, so if you include in your upload an email address already present in **memberplanet** (such as a rolled-over returning member), the newly created member record will revert to the first and last names already on file. For example, if you upload Jen Smith at jen@smith.com and **memberplanet** already has an entry for Jennifer Smith at jen@smith.com, then your newly created record will revert to Jennifer Smith. You can update and modify member names later once your upload is processed.

□ 4. Upload Excel File

Now that the template is filled out, it's time to upload it and get your new members added to the database. From the **memberplanet** admin portal, click **Membership** on the left navigation sidebar.



From the memberplanet admin portal, access the **Membership** page via the left navigation sidebar. Then click **Add Members and Assign Membership** from the **Member Database Tool**.

Member Database Tools

Add members and assign membership

In the Required Setup section, click **3. Activate or Add Members**.

Option 1: Manual setup

1 Assign membership (manual)

2 Add new members (manual)

Click the **Browse** button to select your Excel file from your computer.

Add new members

You have agreed to terms and conditions [Click here](#)

Upload members from an Excel spreadsheet

Import your member roster file from your computer and map the fields to add members in bulk to your online database

Choose a file

Browse Upload

Ignore the first row of my file (choose this option if the first row is just labels)

Note: Make sure your file includes at least a first & last name OR an email address for every person you are uploading

[Click here for more upload tips](#)

Be sure to click the checkbox to **ignore the first row headers** of your file, then click the **Upload** button.

Upload members from an Excel spreadsheet

Choose a file

members fhnemail.xlsx **Browse** **Upload**

Ignore the first row of my file (choose this option if the first row is just labels)

Note: Make sure your file includes at least a first & last name OR an email address for every person you are uploading

[Click here for more upload tips](#)

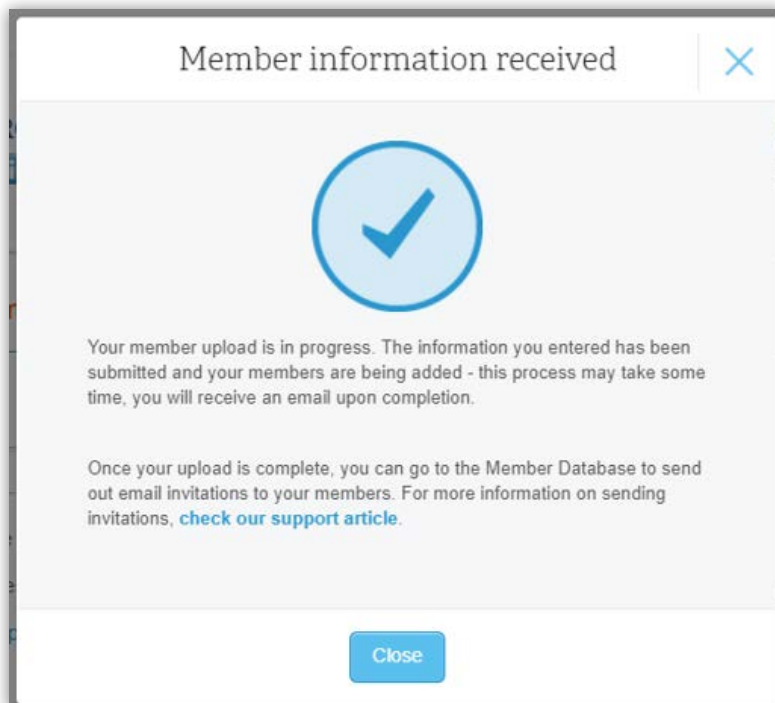
Map or Label Columns

A sample of the spreadsheet will be displayed. Select the dropdown menus above the required columns to map or label **first name, last name, and email address**.

Map your columns

First Name	Last Name	Email Address	Mobile Phone
Marcellia	Andyshak	marci@memberplanet.com	3236102121
EthanMP	AndyshakMP	eandyshak@memberplanet.com	9093213214
Chris	Bables	cbables@cheerful.com	
Al	Cantone	sample321@memberplanet.com	7818884693
Jeff	Carrington	mike@memberplanet.com	

Click the **Add Members** button at the bottom of the page. You will receive an on-screen notification that your upload is in progress. You will receive an email upon completion.



Note: Your upload may have created duplicate records in your database, and that's okay! Your database is divided into two compartments, active and inactive. The records you've just uploaded have been done so as active members. Your inactive records will exist only for historical reference and will not be associated to a membership level as you proceed through the following steps. You also have the option to delete duplicate inactive members.

□ 5. Assign membership

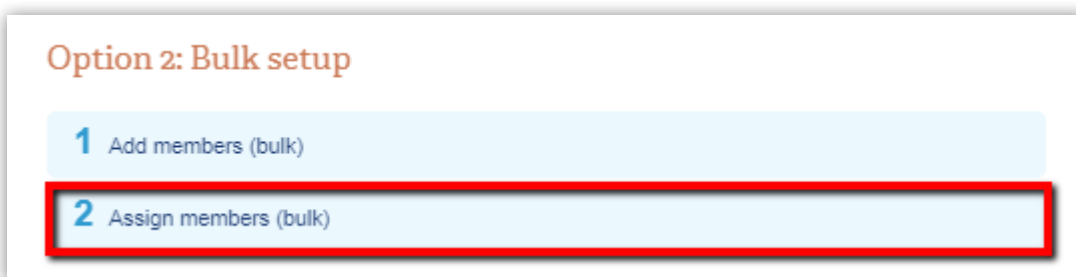
There's one more step now that your members have been uploaded: It's time to assign them to memberships.

Once you are notified that your member upload has been completed, navigate back to your membership page by clicking **Membership** in the left navigation bar. Click **Add Members and Assign Membership** from the **Membership Database Tool** to pick up where you left off.

Member Database Tools

Add members and assign membership

In the Option 2: Bulk Setup section, select step **2. Assign Membership (bulk)**.




You will see a list of individuals that includes those you uploaded via the template as well as those who were rolled over from the previous database. You will want to compare this list to your current member roster in order to see which of the individuals listed have paid for a 2019-2020 membership, that way, you won't miss anyone, or inadvertently double up a member later in the process. To "activate" these members, you will want to assign them to a membership level. **Please note:** You should not "activate" any members from the 2018-2019 school year who have not paid for a 2019-2020 membership.


Ensure that the **Assign Without Payment** (a) option is selected. (The "Record a Payment" option is not relevant to your PTA and should be ignored). Select the **Membership Level** (b) from the dropdown menu. If you skipped steps 1 & 2, a generic placeholder PTA membership will be your only choice. Don't worry about the price - it's not relevant to what we're accomplishing here. If you did not skip steps 1 & 2, you'll see the membership levels we just created in this dropdown. Select one to start with.

Next, **enter '1' in the Quantity** (c). This refers to the number of memberships assigned to each member. Assigning more than one will likely result in overbilling. We don't want that!

Next, **enter 07/01/2020 for the Paid-Through Date** (d). Additionally, by checking off the **Member Card Email** (e) box, you can automatically send a member card to your members. You will also be able to customize the email message they will receive with the member card.



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 * \$25.00-General Membership (Member Covers Fees) ▼

Quantity * 1

Paid through date * 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

Filter by All ▼ and Active & Inactive members ▼

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 2019-2020 paid member roster. **Click the checkboxes** next to the names you wish to “activate” with memberships.

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.

Congratulations! You have finished the WSPTA checklist!

To learn more about sending member cards to your members, [click here](#).