



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
- 6. Assign/update PTA leaders

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).

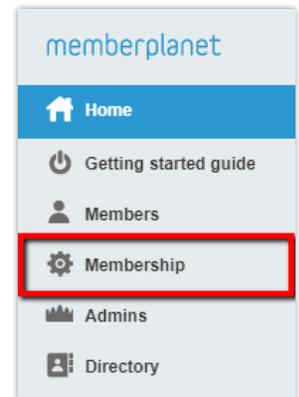
Is it important to you that what you enter into memberplanet reflects your PTA's multiple membership levels? Again, this is not a requirement, but some PTAs find it useful to organize information this way. If yes, **begin at Step 1.**

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.**

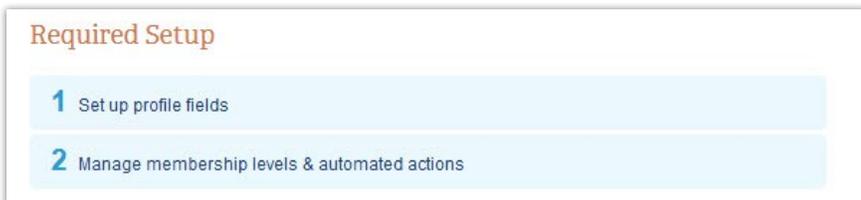
□ I. Membership Level Setup

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.

Membership Levels Organize your members & track membership renewal

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

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

Label	Price \$ (?)	Period (?)	Renewal (?)	
PTA Membership	25.00	Annually	Manual	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">⚙️</div>

[+ Add a membership level](#)

→

- ✎ Edit
- 🗑 Delete
- ⬆ Move up
- ⬇ Move down

Update the label and the price of the membership level to reflect what your local PTA uses.

Label	Price \$ (?)	Period (?)	Renewal (?)
<input type="text" value="PTA Membership"/>	<input type="text" value="Paid"/> <input type="text" value="\$ 25"/>	<input type="text" value="One-time payment"/>	<input type="checkbox"/> Members cover fees (?)

You may also opt-in to utilizing **Price Scaling**, which allows you to establish varying prices based on the quantity of memberships an individual would like to purchase.

Label	Price \$ (?)	Period (?)	Renewal (?)								
<input type="text" value="PTA Membership"/>	<input type="text" value="Paid - Scaling"/> <input type="text" value="\$ 25"/>	<input type="text" value="One-time payment"/>	<input type="checkbox"/> Members cover fees (?)								
<p>Instead of charging a flat amount multiplied by the number of memberships a user select, price scaling allows you to charge a different amount specifically based on how many memberships the user selects. For example, you might want to charge \$15.00 for the first membership, but only \$10.00 each for the second and third memberships. This means the user would pay \$25.00 in total for two memberships, or \$35.00 for three.</p> <p>Use these controls to indicate how much IN TOTAL a user should pay when paying for the corresponding number of memberships.</p> <table border="1"> <thead> <tr> <th>Quantity</th> <th>Total price</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text" value="\$ 15"/></td> </tr> <tr> <td>2</td> <td><input type="text" value="\$ 25"/></td> </tr> <tr> <td>3</td> <td><input type="text" value="\$ 35"/> ✘</td> </tr> </tbody> </table> <p>+ Add another row</p>				Quantity	Total price	1	<input type="text" value="\$ 15"/>	2	<input type="text" value="\$ 25"/>	3	<input type="text" value="\$ 35"/> ✘
Quantity	Total price										
1	<input type="text" value="\$ 15"/>										
2	<input type="text" value="\$ 25"/>										
3	<input type="text" value="\$ 35"/> ✘										

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 example, your group might offer a free membership or different tiers of paid membership levels. Use this page to set up your membership levels along with automated reminders and notifications.

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

Label	Price \$ (?)	Period (?)	Renewal (?)	
PTA Membership	25.00	One-time payment	n/a	

 Add a membership level

Repeat these steps to add more membership levels.

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** from last year are already in the memberplanet database.

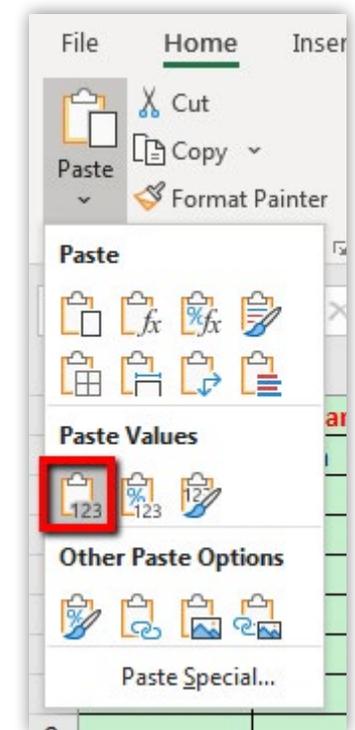
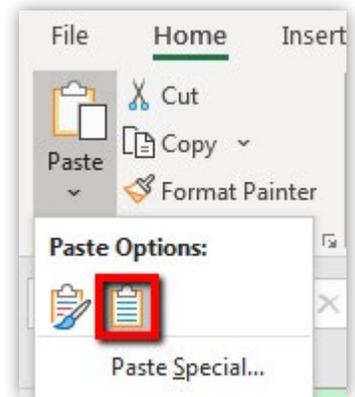
Copy and paste the **first names, last names, and email addresses** of your **new members** from your roster to the template. *TIP: To simplify the membership assignment process, ensure that the records you are importing are only of paid members - do not include nonmember family members or contacts.*

When you paste your data, use the paste option **Match Destination Formatting (clipboard icon)** or **Paste Values (clipboard icon with I23)**.

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			

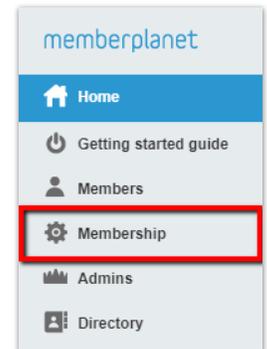


Correct any highlighted cells and save your file as an Excel 97-2003 Workbook (*.xls).

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 f1nemail.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](#)

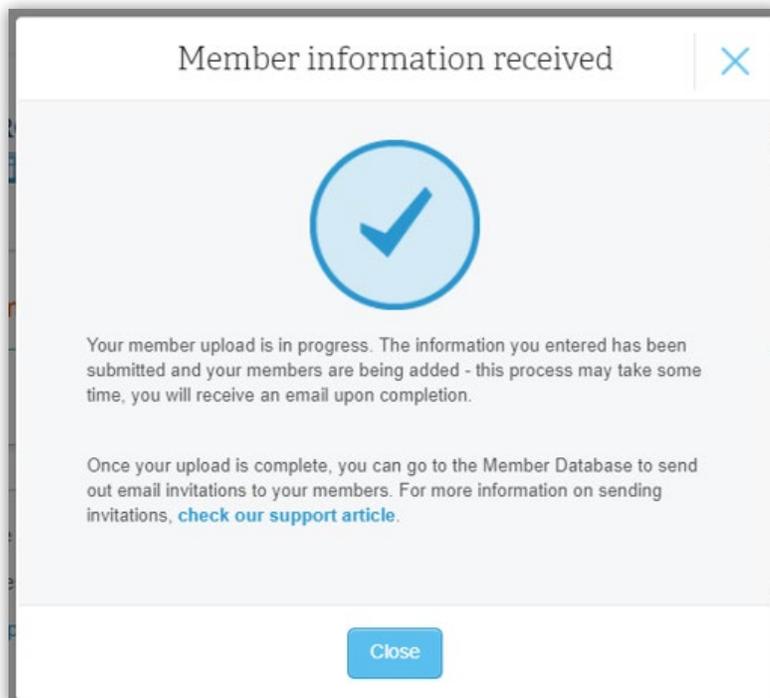
Map or Label Columns

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
Marcella	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

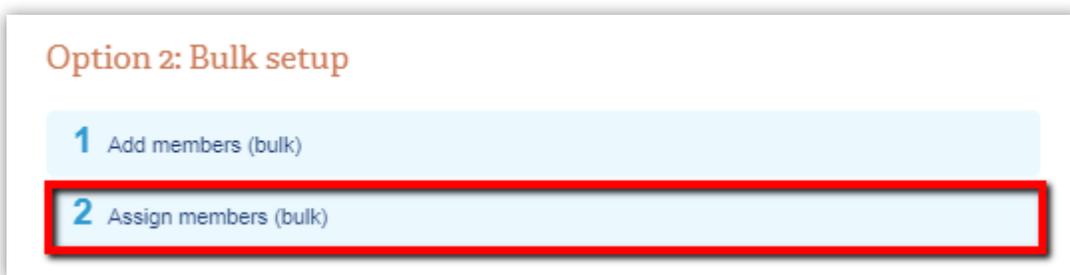
Now that your members have been uploaded, it's time to assign them to memberships.

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 are already in the 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 current membership. To “activate” these members, you will want to assign them to a membership level. Please note: You should not “activate” any members from the previous school year who have not paid for a current membership.

Ensure that the **Assign Without Payment** option is selected. (The “Record a Payment” option is not relevant to your PTA and should be ignored). Select the **Membership Level** 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.

Next, **enter '1' in the Quantity section**. 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!

By checking off the **Member Card Email** 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-PTA Membership

Quantity *

1

Member card email Send members an email with a link to the member card

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

Choose members
 All members

First Name
Filter by All and Active & Inactive members

Rows selected : 3

<input type="checkbox"/>	First Name ▲	Last Name	Email	Level	Paidthru date
<input checked="" type="checkbox"/>	Eric	Whittington	ewhittington@memberplan...		
<input checked="" type="checkbox"/>	George	Lucas			
<input checked="" type="checkbox"/>	Greg	Beilstein	gbeilstein@memberplanet...		
<input type="checkbox"/>	Mercie	Macatrao	mmacatrao@memberplan...		

12 records
Prev | Next

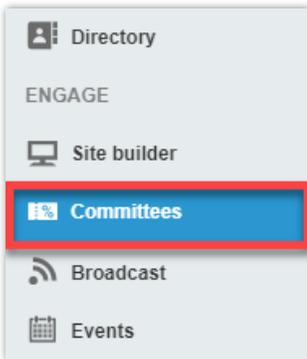
per page [Go](#)
page 1 of 1 | jump to page [Go](#)

Assign level

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

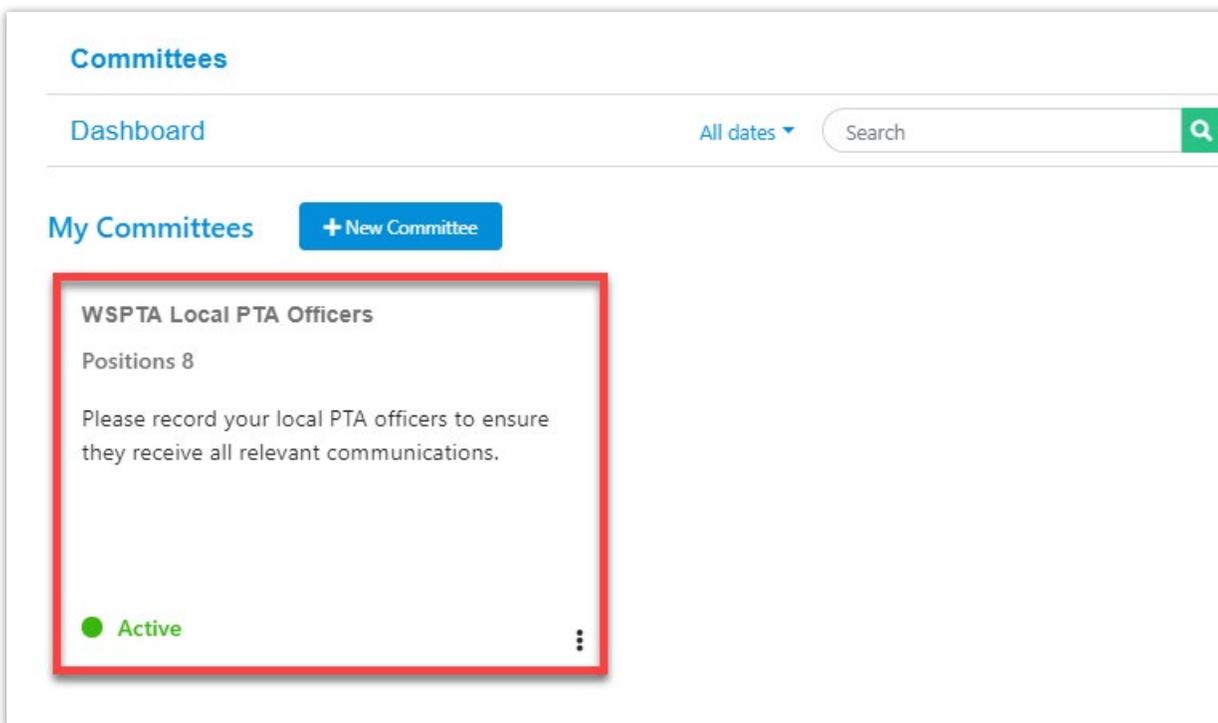
□ 6. Assign/Update PTA Leaders



The last step is to assign mandatory roles to members: president, vice president, treasurer, and secretary. Since you completed **Steps 4 and 5**, these individuals should already be in the database for you to assign them their roles. If they are not in the database, go back to **Steps 4 and 5** before proceeding. As long as they are in the database, you can update their contact info within the Committees module.

In the left navigation sidebar, click **Committees**.

In your committee dashboard, click on the WSPTA card that is displayed.



Click to assign members to roles for **President, Vice President, Treasurer, and Secretary.**

Committees

Committee Dashboard

WSPTA Local PTA Officers [Edit committee](#)

● Active

Description here for local PTA Officers.

Positions Notes

[Edit positions](#) [Edit terms](#)

2020 - 2021 (07/01/2020 to 06/30/2021)

Advocacy		(none)
Communications		(none)
Membership		(none)
President		(none)
Reflections		(none)
Secretary		(none)
Treasurer		(none)
Vice President		(none)

Locate the person you wish to assign, then select the person's corresponding **Assign** button.

- You can use the search bar to search by name or email, then select a header to sort the column.

Committees

Assign a President Cancel

Search by name

Name ↑	Email	ID	
Abey Klain	aklain1b@mpctest.com	713035	
Abey Vitler	avitler44@mpctest.com	713106	
Addison Broscombe	abroscombe2r@mpctest.com	713090	

Click **Continue** at the bottom right.

You will be brought back to your committee dashboard. You can continue assigning committee roles until you are finished.

Optional: Once you have assigned a role, you can change a person's contact info by clicking the pencil icon. When finished editing the contact info, click **Continue** to save changes.

Committees

Committee Dashboard

Advocacy	+	(none)
Communications	+	(none)
Membership	+	(none)
President		Abey aklain1b@mptest.com 4021129320
Reflections	+	(none)
Secretary	+	(none)
Treasurer	+	(none)
Vice President	+	(none)

Congratulations! You have finished the WSPTA checklist!

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