memberplanet

NCGA Checklist for Basic Membership

The following is a simplified checklist to easily fulfill the NCGA requirement that all local clubs enter paid members into the membership database used by NCGA. This checklist should be used if your club 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

☐ **1. Add Members**

☐ **2. Remove Members (optional)**

Before we begin:

First things first - you'll need to claim your admin account. You should receive the Claim Admin Account email from memberplanet. **Click the claim account link** within the email to activate your account.

After clicking the claim account link, you will be prompted to **enter your email address** to activate your account.

An onscreen notification will appear and a verification email will be sent to the email address you entered. In the verification email you receive, **click the verify account link**.

You will then be prompted to **create a password** and complete the activation process.

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

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

When you first log in to memberplanet and view your member database, you will see your existing members. These records are automatically populated because of our sync with GHIN. Continue to Step 1 to add members who have paid by check or cash.
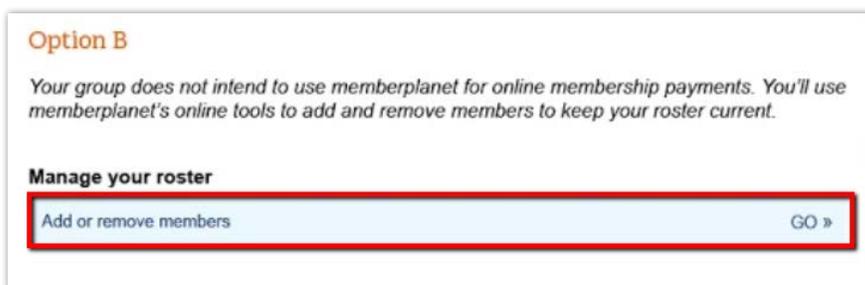
☐ 1. Add Members

When you add a member record to memberplanet, the sync allows the record to be populated in GHIN within an hour and will generate a GHIN number for new members. Currently, you can add members through this process one at a time.
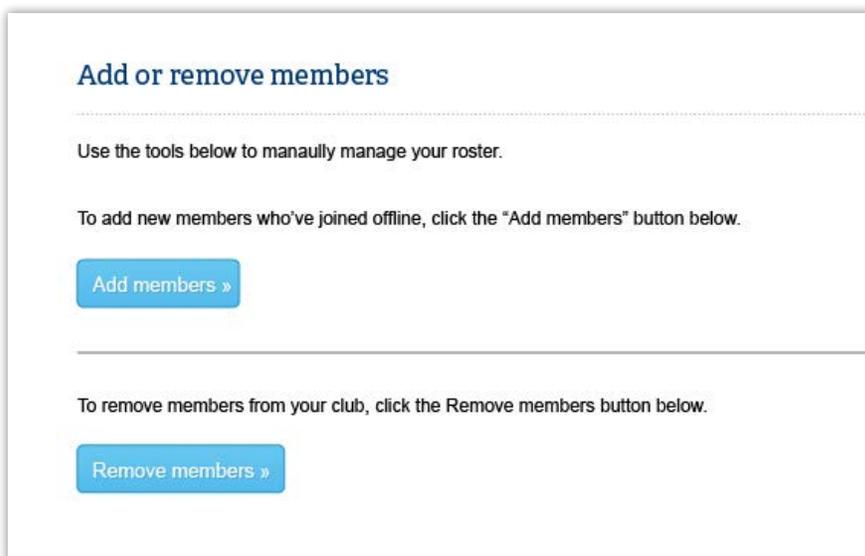
First, go to your memberplanet admin portal. On the left navigation sidebar, click **Membership**. Then, in the submenu, select **Membership Dashboard**.
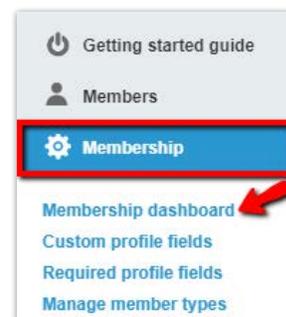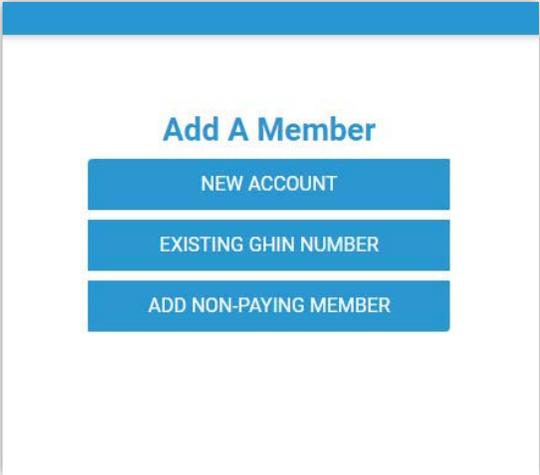
On your membership dashboard, you'll see two options. You'll skip Option A, which is irrelevant for you because of our sync with GHIN. Under Option B, select **Add or Remove Members**.

In the popup window, click **Add Members**.

If the member is new to NCGA, select the New Account option to create a new profile and generate a new GHIN number. If the member already has a GHIN number, select the Existing GHIN number option. Note: the Add Non-Paying Member, is used to add non-NCGA members to your group and is useful for creating non-dues-paying admin accounts. This option will not generate a GHIN number for the user.

Enter in the member information

Or enter the member's GHIN number and select **Continue**.

Confirm the member details and click **Add Member** on the bottom right.

Review
Confirm your member details

| Member Info	Arnold Palmer
	apalmer@mp.com
	Date of birth: 10/09/1960
	123 St
	Torrance, California 12345

‹ BACK   ADD MEMBER

A confirmation will appear. To add more members, select **Add Another** and go through the same process.

You've added a member!

A member has been added to your group. Click continue to return to your member
database, or create another member.

CONTINUE

ADD ANOTHER
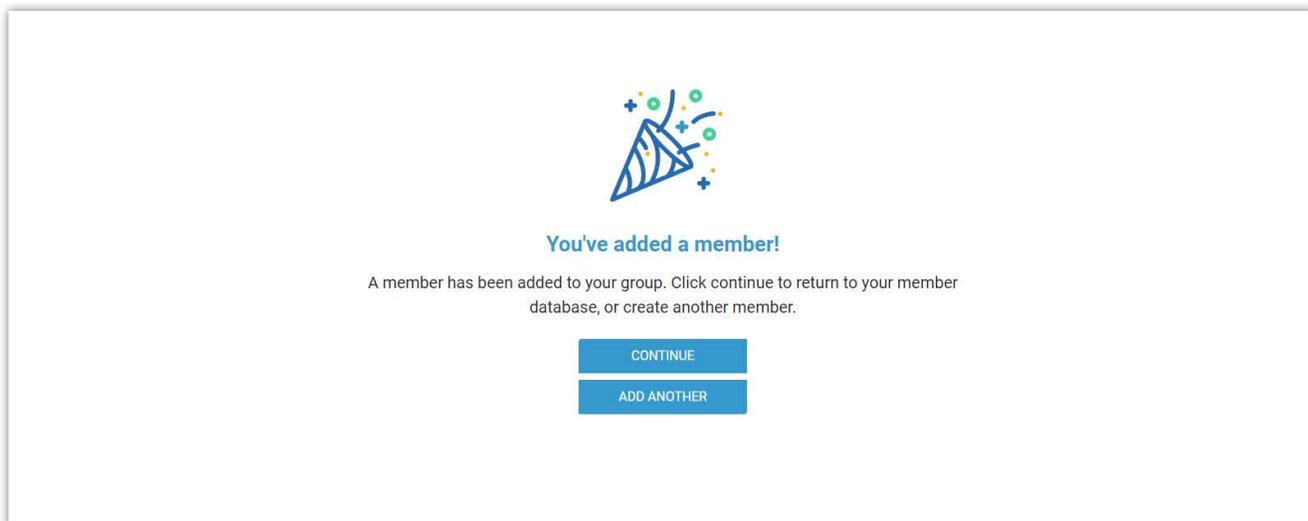
□ 2. Remove Members

To remove members from your memberplanet database, navigate back to the membership dashboard by clicking **Membership** on the left navigation sidebar. Then, in the submenu, select **Membership Dashboard**.
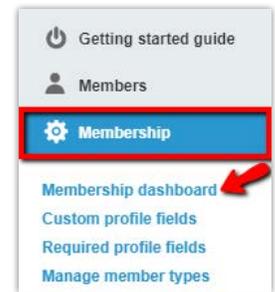
Under Option B, select **Add or Remove Members**.

In the popup window, click **Remove Members**.

Delete members - permanently remove them from the member database and cancel any future payments.

Note: Once you remove members from your group, this cannot be undone.

From the dropdown menu, select an action, then click the checkboxes next to the member names you wish to remove. Select the **Remove Members** button at the bottom right of the screen.

On the next screen, confirm that you wish to delete the members you have selected by typing in DELETE in the text box and clicking **Remove Members.**