NCNW MEMBERSHIP ADMINISTRATORS WEBINAR
January 14, 2021
Membership Administrator Webinar Training Goals

1. Online user accounts will be created for the following officers on record:
   - State Presidents
   - Section Presidents, 2\textsuperscript{nd} Vice Presidents and Treasurers
2. Issue login account and password information which will be separate from your personal NCNW membership login account information before the scheduled webinar/training
3. Post Membership Administrator Toolkit (PowerPoint and Video) on the website for future use and reference
4. Provide answers to frequently asked questions (FAQs)
Accessing Leader Administrator Accounts

Click here to access your administrator account https://ncnw.givecloud.co/jpanel/auth/forgot-password. Your screen should look like this:
Reset Your Password
Administrator Accounts

After requesting password reset you will get a follow-up email with a link to select your own unique password.
Create Your New Password

Administrator Accounts

Enter your email address. Enter a new password (you can use a password from before). Confirm new password. Click reset password.
NCNW Membership Dashboard & Control Panel
Administrator Accounts

If done correctly, you will be redirected to the NCNW Control Panel. It looks similar to the one on the next slide.

Your actual dashboard will have less categories than the one shown here. This is my view as the site owner.
How to Use the NCNW Membership Dashboard & Control Panel
Administrator Accounts

Go to ncnw.org. Click My Account. Select the Welcome Back Box. Enter the email address and password you set up earlier for your administrator account. Click Sign-in.
How to Use the NCNW Membership Dashboard & Control Panel (Cont’d.)

Administrator Accounts

You should receive the following message. "Incorrect email/password. If you are attempting to log in to the control panel, click here". Click on "click here". This will take you to the NCNW membership dashboard & control panel.
Adding a New Member

Select “Accounts” from the left control panel.
Adding a New Member (Cont’d.)

Click “Add”.

Accounts + Add
Adding a New Member (Cont’d.)

• Under the General Information Tab
  • Enter Title, First Name, Last Name, Email Address
  • Please do not enter organization name here/Leave Blank
  • Account Type is defaulted to "Individual"
  • Referral Source and Referred by are not being used at this time.
  • Leave password blank (You will tell the new member to create a password when they login for the first time).

• Billing:
  • This is the new members information

• Shipping:
  • Enter this information if different than the billing address
Adding a New Member (Cont’d.)

Sample General Information Tab:

<table>
<thead>
<tr>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>Organization Name</td>
</tr>
<tr>
<td>Account Type</td>
</tr>
<tr>
<td>Referral Source</td>
</tr>
<tr>
<td>Referred By</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email &amp; Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Password</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Billing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name</td>
</tr>
<tr>
<td>Address Line 1</td>
</tr>
<tr>
<td>Address Line 2</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>State Prov.</td>
</tr>
<tr>
<td>ZIP/Postal</td>
</tr>
<tr>
<td>Select Country</td>
</tr>
<tr>
<td>Phone</td>
</tr>
<tr>
<td>Email</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shipping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name</td>
</tr>
<tr>
<td>Address Line 1</td>
</tr>
<tr>
<td>Address Line 2</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>State Prov.</td>
</tr>
<tr>
<td>ZIP/Postal</td>
</tr>
<tr>
<td>Select Country</td>
</tr>
<tr>
<td>Phone</td>
</tr>
<tr>
<td>Email</td>
</tr>
</tbody>
</table>
Adding a New Member (Cont’d.)

Once all of the general information (name, address, phone and email address) has been entered click "Save" found at the top right.

Now you are ready to purchase the membership for the new member you just added.
Purchase New Membership

Click Point of Sale (POS) found at the bottom left of the membership control panel. Click on “Memberships”. This will show the different NCNW membership categories.
Click on the membership category of the new member you just added.
Purchase New Membership (Cont’d.)

Select the section and affiliate organization if applicable from this list.

An annual membership is available for members of the organization. If you are a member of a section, or would like to join a section, please select from the list below:

- N/A
- A.M.E. Zion NW-Chicago District Section, IL
- African Jewels Youth Section Louisville KY, KY
- Alamance-Guilford Section, NC
- Alameda County Section, CA
- Albany State University, GA
- Albuquerque Section, NM
- Alton Section, IL
- Alton Youth Section, IL
- Arizona State University, AZ
- Athens Westmont Section, CA
- Austin Section, TX
- Barbara Jordan-Houston Section, TX
- Beaumont-Southeast Texas Area Section, TX
- Benedict-Byrd, SC
- Bertha Black Rhoda Section, MO
- Bethune-Cookman University Collegiate Section, FL
- Bethune-Leonard Section, SC
- Bethune-Leonard Youth Section, SC
- Bloomsburg University, PA
Purchase New Membership (Cont’d.)

Scroll to the bottom and click "Add". This adds the membership category, section and affiliate organization to the purchase order.
Purchase New Membership (Cont’d.)

Now the new membership is in your shopping cart:
Purchase New Membership (Cont’d.)

Got to the bottom left of the shopping cart and click on "Account":

![Account section of a website]

Enter the name of the new member you just added here in the search box.

![Search for an account in the website]

- [Use Account]
- [Continue as Guest]
For this example, my new member’s name is “Training Record” which I added earlier using the control panel account “add” function. Enter Training Record in the search box. A drop down menu appears showing the new member’s account. From the drop down menu select the name “Training Record“. Click “Use Account.”
Purchase New Membership (Cont’d.)

My new member’s name and contact information now shows at the bottom of the shopping cart. Review the information for correctness. You can also make changes/corrections to the name and contact info here by clicking on the pencil symbol to the right of the name and contact information. Click on “Complete Order” at the very bottom of the shopping cart. You are now ready to checkout and pay.
Making The Payment for a New Membership

You will **ONLY** be using one of two tabs to make your payment. Tab labeled “Credit Card” is for both debit and credit card payments. Tab labeled “Bank” is for check payments (**DO NOT USE THE TAB LABELED CHECK. THIS IS FOR HQS USE ONLY**). Also, you must check the box authorizing NCNW to charge the checking account for the specified total.
Making The Payment for a New Membership (Cont.d)

Once you have entered the payment information you will see that the “send confirmation emails” box is checked by default. Members with an email address in their record will get a notification of this purchase which contains a copy of the membership card as well. Click finish.
Making The Payment for a New Membership (Cont’d.)

After you have made the payment you will get a message showing the purchase order is complete along with an order #. Click close. **Note:** You will not be able to view or print the order. This is for HQs use only.
Purchase Order Confirmation Email Sample

This is a standard message that all members and donors receive when an order is successfully processed through the NCNW website.

Dear [[bill_first_name]],

This email confirms that your Order #[[order_number]] for [[total_amount]] has been successfully processed on a [[bill_card_type]] card ending in [[bill_card_last_4]]. Your confirmation number is [[confirmation_number]].

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David Glenn, Jr.

Membership Director
Dear Ms. LaNita Freeman:

On behalf of the Board of Directors of NCNW—Thank You! Your Annual membership and ongoing support helps us to build on our rich legacy of leadership.

NCNW’s Four for the Future programmatic foci is inter related around—Education, Health, Entrepreneurship & Economic Empowerment, and Civic Engagement—women remain as urgent and important as ever! Thank you for investing in our mission-critical work.

Below please find your official NCNW membership card. To stay abreast of our national initiatives, find a local section near you or learn more about our history.

Life Member, simply email us at membership@ncnw.org.

Sincerely,

David Glenn, Jr., Membership Director
Renew an Active or Inactive Member

Select “Accounts” from the left control panel.
Renew an Active or Inactive Member
(Cont’d.)

Repeat the steps above starting with Point of Sale (POS).
Add Member to a Section and/or Affiliate Organization

Choose “Accounts” for the left Membership Control Panel
Add Member to a Section and/or Affiliate Organization (Cont’d.)

Find the Search box and enter the name of the member you want to add to your section and/or add to an affiliate organization. Select the member by clicking the magnifying glass next to their name. Hit enter.
Add Member to a Section and/or Affiliate Organization (Cont’d.)

Go to Memberships. Click on "Add".

<table>
<thead>
<tr>
<th>Membership</th>
<th>Starts</th>
<th>Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual</td>
<td>Apr 13, 2016</td>
<td>Sep 30, 2017</td>
</tr>
<tr>
<td>Metropolitan Greensboro Area Section</td>
<td>Apr 13, 2016</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Add Member to a Section and/or Affiliate Organization (Cont’d.)

Click the “Choose One” field. A dropdown menu appears listing all of the sections and affiliate organizations. Select the Section and/or Affiliate Organization which apply to the member (you can only do one section/affiliate at a time). You should only select one Section. However, you can choose multiple Affiliate Organizations. Repeat this step if a member lists multiple Affiliate Organizations.
Add Member to a Section and/or Affiliate Organization (Cont’d.)

Enter the joining date in the “start date” block for both Section and Affiliate Organizations. **Note:** this should be the date the member joined your section. Enter the same date for adding Affiliate Organizations (**Do not enter the date the member joined their affiliate organization**). The “Source” is always other. Click Update to finish adding the organizations.
Review and Edit Member Record

From the accounts tab you can search for the member. Go to Filters. Use the first search field. Enter the member’s name. Click the magnifying glass (search symbol) next to the member’s name to select the member.
Review and Edit Member Record (Cont.d)

Edit the name, address, phone number, email address, membership category, etc. Click on Save in the upper right hand corner of the record when done.
Export Roster of Members

**Note:** The export feature which is used to create the state and section rosters is currently being modified/updated by our tech team to give us a more user friendly result.

At this time, you can export a roster of your section members; however, you will have to do a lot of massaging and deleting to make the exported document data friendly. If you are familiar with Excel/CSV you should be able to do this, but it will be somewhat time consuming.

State leaders can export rosters by section in their state but not by individuals only at this time.

We will let you know when the tech team has completed the modification/update to the system.
Export Roster of Members (Cont’d.)

From the accounts tab you can search for your section. Go to Filters. Use the field labeled "Memberships" located to the far right:
Export Roster of Members (Cont’d.)

Enter your section name and select it from the dropdown menu.

Once selected, a list of your members will appear as such:

<table>
<thead>
<tr>
<th>Name</th>
<th>Account Type</th>
<th>Source</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angee Elangea</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:angee.elangea@gmail.com">angee.elangea@gmail.com</a></td>
</tr>
<tr>
<td>Anne Johnson</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:anjgunson317@yahoo.com">anjgunson317@yahoo.com</a></td>
</tr>
<tr>
<td>Barbara K pontz</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:barbapontz@hotmail.com">barbapontz@hotmail.com</a></td>
</tr>
<tr>
<td>Barbara Foglin</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:lung2@q.com">lung2@q.com</a></td>
</tr>
<tr>
<td>Betty J. Taylor</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:bj.taylor1356@yahoo.com">bj.taylor1356@yahoo.com</a></td>
</tr>
<tr>
<td>Bianca Jackson</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:biancaejackson@hotmail.com">biancaejackson@hotmail.com</a></td>
</tr>
<tr>
<td>Bonnie Fox</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:bfox9912@sbcglobal.com">bfox9912@sbcglobal.com</a></td>
</tr>
<tr>
<td>Camne Holland</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:camne.holland@gmail.com">camne.holland@gmail.com</a></td>
</tr>
<tr>
<td>Candace Wallace</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:candace9208@hotmail.com">candace9208@hotmail.com</a></td>
</tr>
<tr>
<td>Carita Tolbert</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:caritatolbert@gmail.com">caritatolbert@gmail.com</a></td>
</tr>
<tr>
<td>Camryn Thompson</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:camrynthompson@link.missouri.edu">camrynthompson@link.missouri.edu</a></td>
</tr>
<tr>
<td>Carole Royal</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:chrislee125@gmail.com">chrislee125@gmail.com</a></td>
</tr>
<tr>
<td>Constance Scott</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:ctscolar@yahoo.com">ctscolar@yahoo.com</a></td>
</tr>
<tr>
<td>Crystal Barron</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:mbrron67@gmail.com">mbrron67@gmail.com</a></td>
</tr>
<tr>
<td>Florence Parmer</td>
<td>Individual</td>
<td></td>
<td><a href="mailto:florenceparker3554@gmail.com">florenceparker3554@gmail.com</a></td>
</tr>
</tbody>
</table>
Export Roster of Members (Cont’d.)

At the top right you will find the "Export" button with two dropdown options, “Export Emails Only” and “Export All Data”. Make your selection. You will get a CSV file of your members. Look to the bottom left for the downloaded file. Click the download to open the file.
To our National Membership Co-Chairs, Dr. A. Lois Keith and Ms. Diane Powell Larche’, thank you for your governance and continuing support!

To the NCNW State and Section Leaders who participated in this meeting, and who are doing the work necessary to sustain and grow our membership, thank you! Please know that we appreciate you and are here to support your efforts in any way we can!

I would like to give a very special thank you to our Communications Director, Tkeban Jahannes and our Communications Assistant, Kayla Allen for their help and technical assistance with hosting this webinar.

To Malinda Todd, NCNW Membership Coordinator, thank you for all your hard work and long hours in getting our day-to-day work done.

David Glenn, Jr.
Membership Director