NCNW MEMBERSHIP ADMINISTRATORS WEBINAR
January 14, 2021

National Council of Negro Women, Inc. ▪ 633 Pennsylvania Avenue, NW ▪ Washington, DC 20004 ▪ 202-737-0120

ncnw_hq   ncnw633   @NCNWHQ

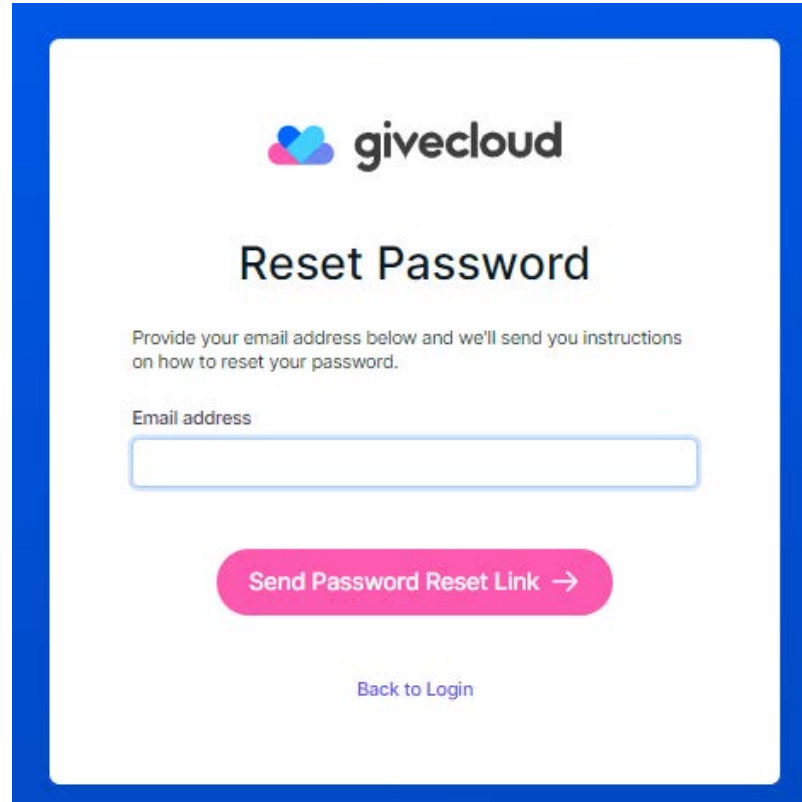# Membership Administrator Webinar Training Goals

1. Online user accounts will be created for the following officers on record:
   - State Presidents
   - Section Presidents, 2nd 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.
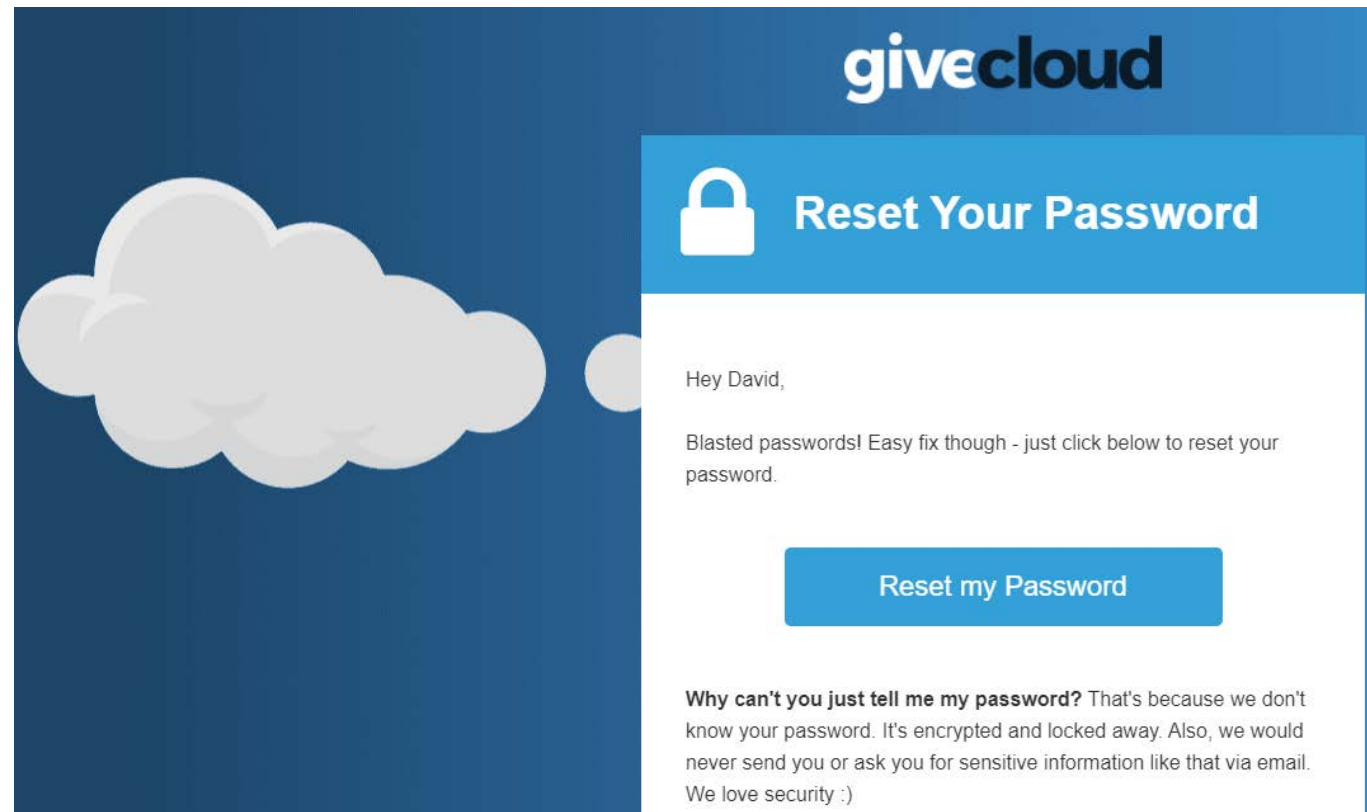
Create Your New Password
Administrator Accounts

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.

NCNW Membership Dashboard & Control Panel Administrator Accounts (Cont.d)
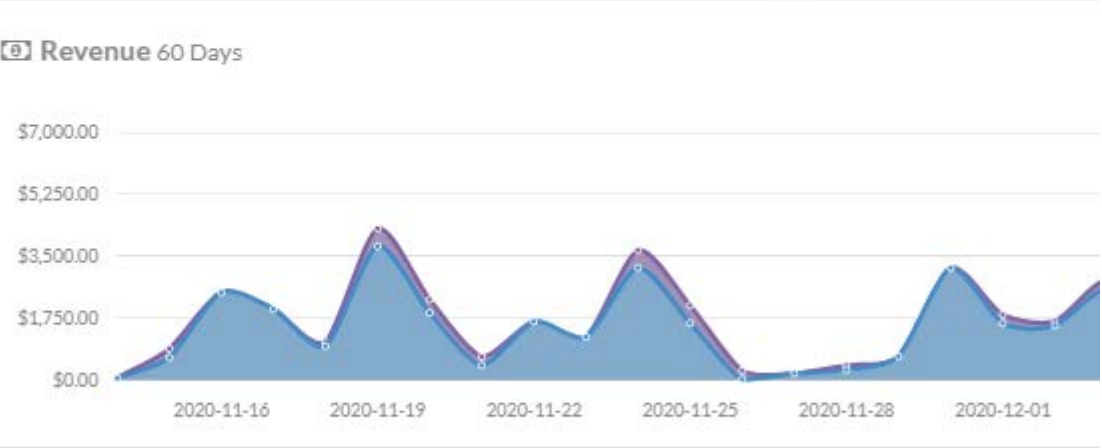
How to Use the NCNW Membership Dashboard & Control Panel Administrator Accounts

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.

My Account

Welcome Back!

Login

✉ Email
dglenn@ncnw.org

🔒 Password
•••••••••••

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.

Incorrect email / password. If you are attempting to log in to the control panel, click here

Adding a New Member

Select "Accounts" from the left control panel.
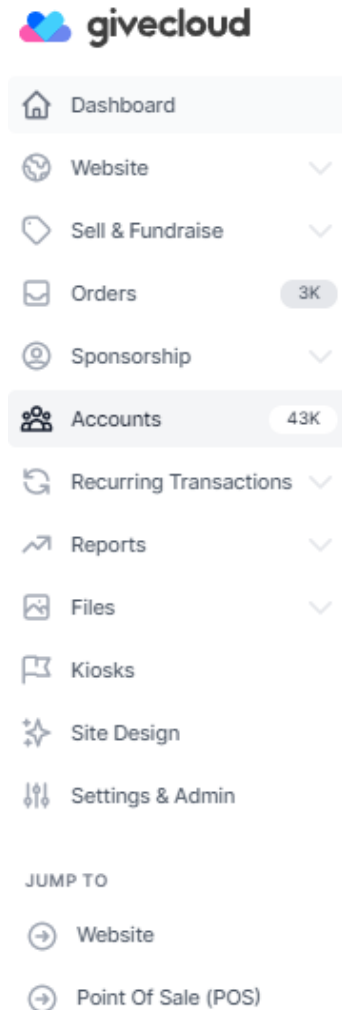
Adding a New Member (Cont'd.)

Click "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:

Q General

& General

Title	First Name	Last Name
--		

Organization Name | Account Type | Referral Source
Organization Name | Individual |

Referred By
Find an account...

🔒 Email & Login

Email (also used to login)
✉ email@address.com

☐ Send me emails and updates

Password

🖥 Billing

--	First Name	Last Name

Organization Name

Address Line 1

Address Line 2

City	State/Prov

ZIP/Postal	Select Country

☎ 555-555-5555

✉ email@address.com

🚚 Shipping

--	First Name	Last Name

Organization Name

Address Line 1

Address Line 2

City	State/Prov

ZIP/Postal	Select Country

☎ 555-555-5555

✉ email@address.com

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.
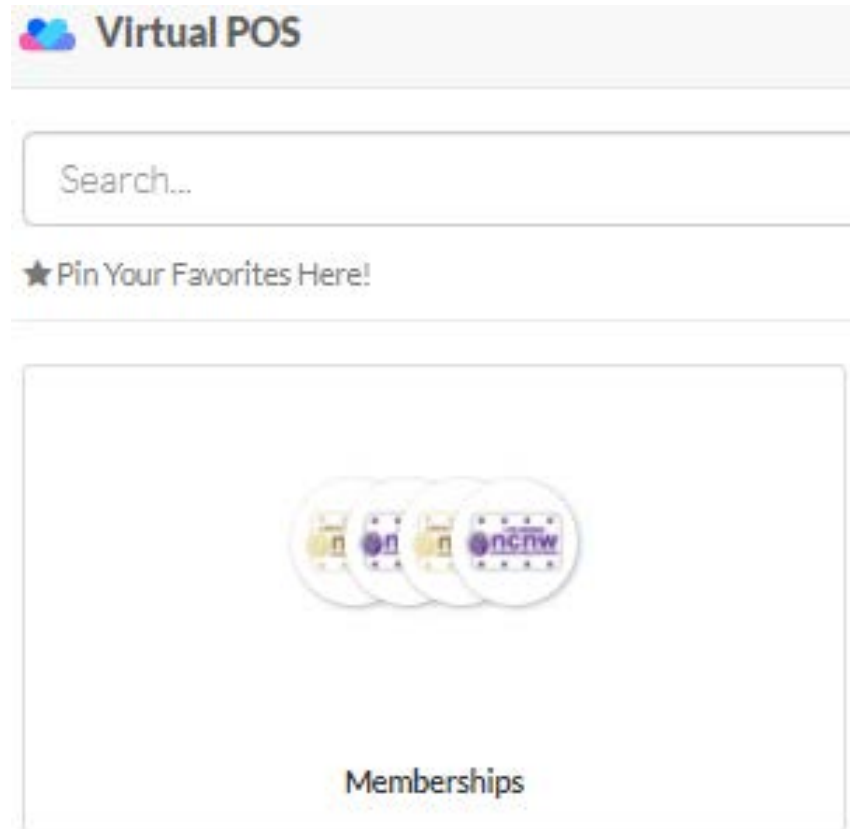
Purchase New Membership (Cont'd.)

Click on the membership category of the new member you just added.

Advocate
MEM-ADV
$75.00

Associate (Men Only)
MEM-ASSOC
$50.00

Annual
MEM-ANNUAL
$50.00

Associate Lifetime (Men Only)
MEM-ASSOCLIFE
$500.00

Group Lifetime
MEM-GRPLIFE
$750.00

Leadership Circle
MEM-LEAD
$150.00

Legacy Life
MEM-LEGLIFE
$1,000.00

Lifetime
MEM-LIFE
$500.00

Student (Collegiates Only)
MEM-STU
$10.00

Youth (Middle thru High School Only)
MEM-YOUTH
$5.00

Lifetime Installment Plan
MEM-LIFEINSTALL
$125.00

Legacy Life Installment Plan
MEM-LEGLIFEINSTALL
$250.00

Lifetime (Odd Payment Amounts)
MEM-LIFE-ODD-PAYMENT-AMOUNT

Legacy Life (Odd Payment Amounts)
MEM-LEGLIFE-ODD-PAYMENT-AMOUNT

Purchase New Membership (Cont'd.)

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

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.)
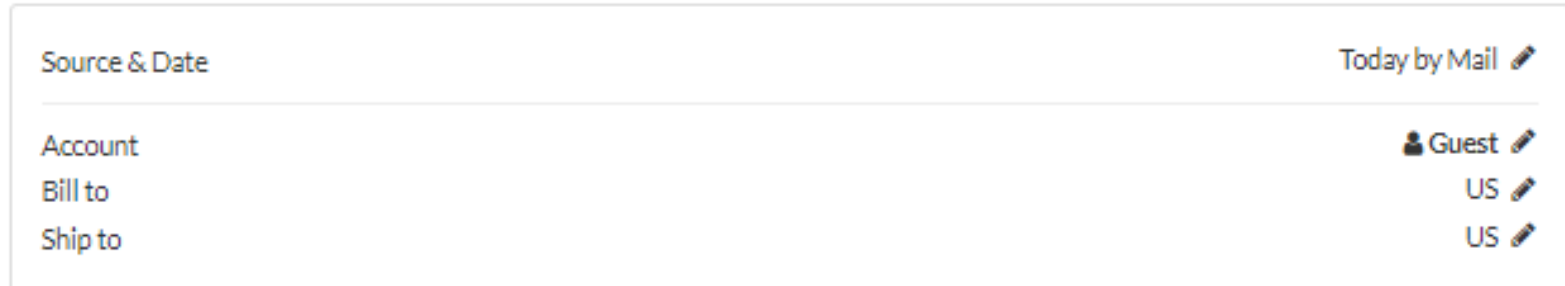
Now the new membership is in your shopping cart:

Purchase New Membership (Cont'd.)

Got to the bottom left of the shopping cart and click on "Account":
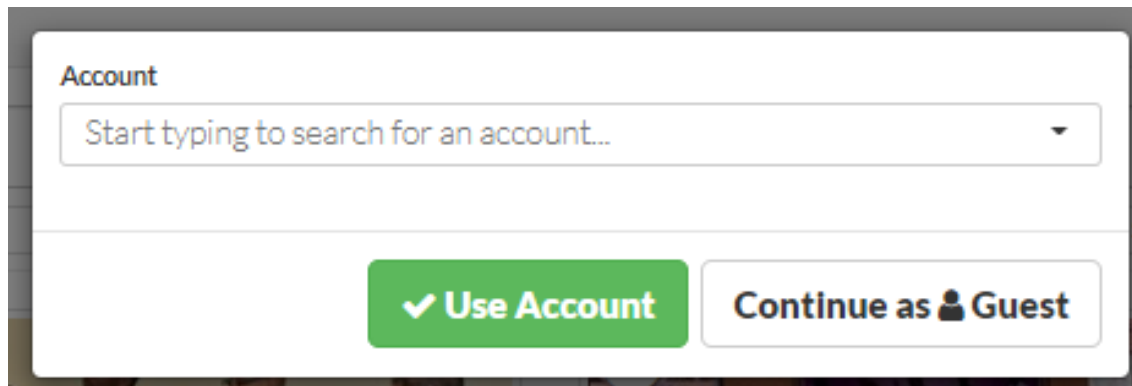
Source & Date	Today by Mail ✏
Account	👤 Guest ✏
Bill to	US ✏
Ship to	US ✏

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

Account
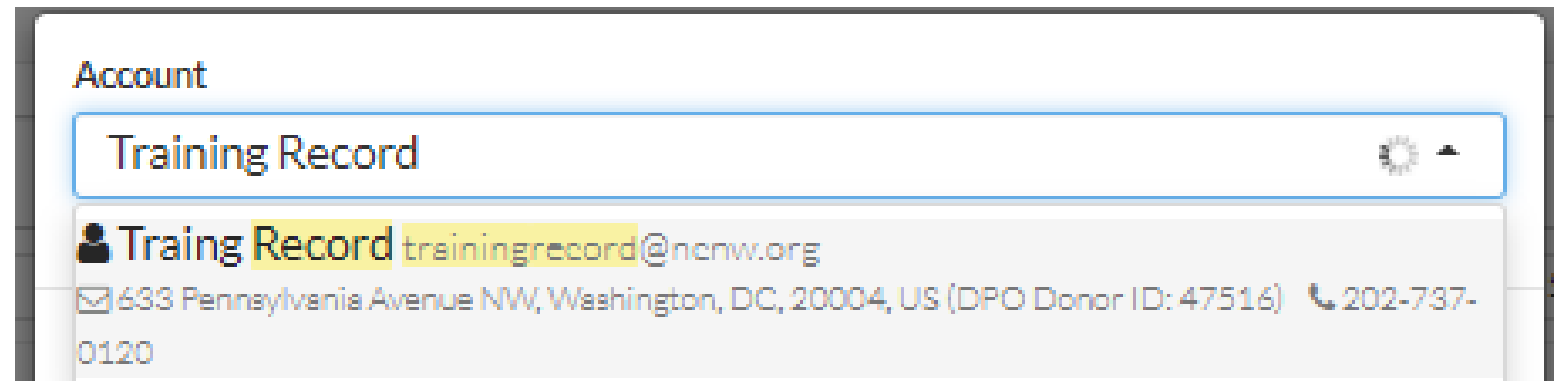
Start typing to search for an account...   ▾

✔ **Use Account**   **Continue as** 👤 **Guest**

Purchase New Membership (Cont'd.)

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.
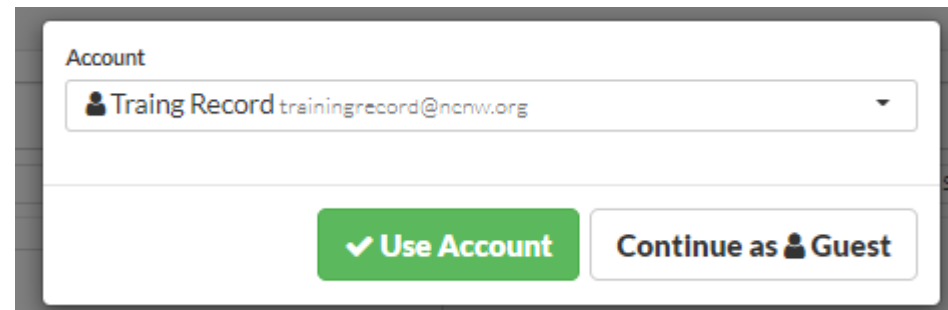
Purchase New Membership (Cont'd.)
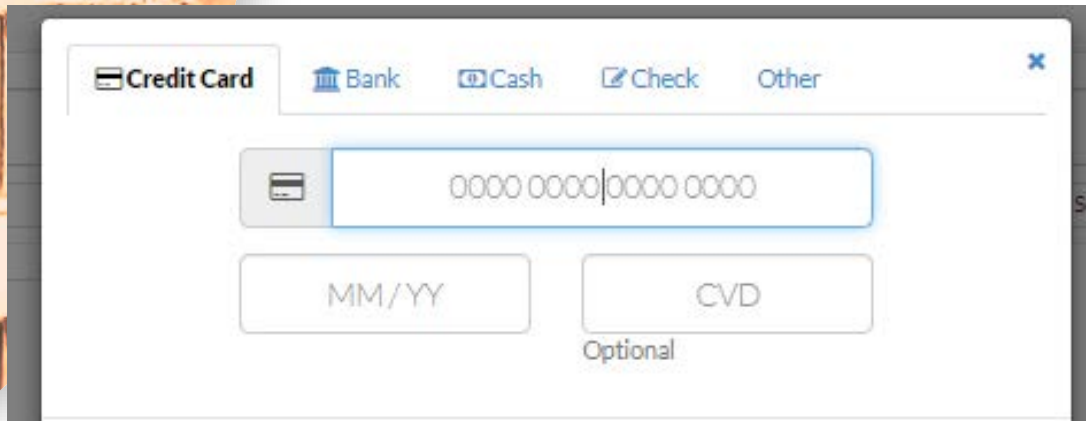
My new member's name and contact information now shows at the bottom of the shopping cart. Review the information for correctness. You can also make changes/corrections to the name and contact info here by clicking on the pencil symbol to the right of the name and contact information. Click on "Complete Order" at the very bottom of the shopping cart. You are now ready to checkout and pay.

Source & Date	Today by Mail ✏️
Account	👤 Traing Record ✏️
Bill to	Training Record ✏️ 633 Pennsylvania Avenue NW Washington, DC, 20004, US trainingrecord@ncnw.org 202-737-0120
Ship to	*None* ✏️
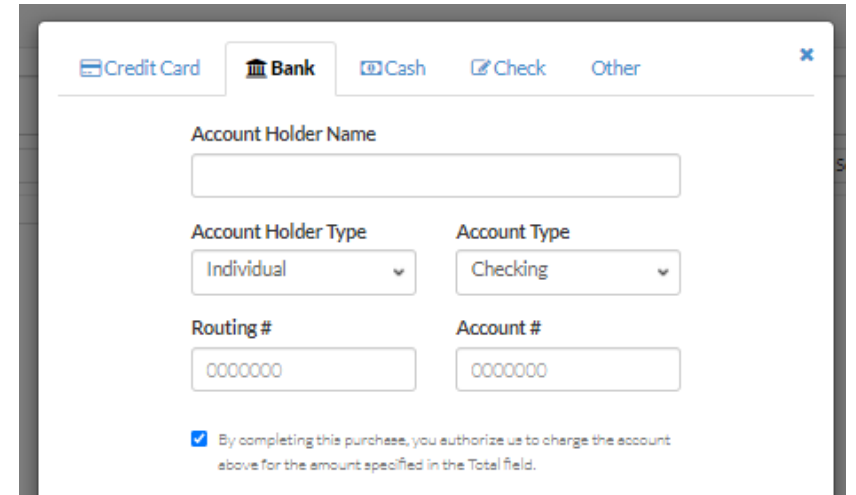
✔ Complete Order

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

☑ Send confirmation emails.

If email is provided, send all confirmation emails.

☐ Mark order as completed.

Order will be pushed directly to "Completed".

✔ 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.

Order #78C448600B Complete!

Q View   🖶 Print   Close
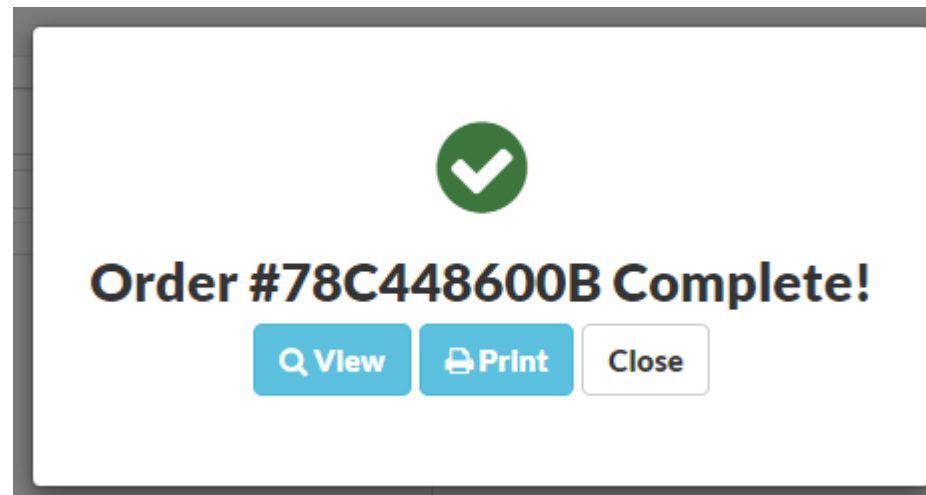
Purchase Order Confirmation Email Sample

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]].

--
David Glenn, Jr.

Membership Director

Membership Purchase Email

This is a sample of what the member receives who has an email address in their record for joining or renewing their membership.

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 programmtic foci is inter related around—**Education, Health, Entrepreneurship & Economic Empowerment, and Civic Eng** 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 hist Life Member, simply email us at membership@ncnw.org.

Sincerely,

David Glenn, Jr., Membership Director

NATIONAL COUNCIL OF NEGRO WOMEN, INC.

It is our pledge to make a lasting contribution to all that is finest and best in America, to cherish and enrich her heritage of freedom and progress by working for the integration of all her people regardless of race, creed, or national origin, into her spiritual, social, cultural, civic, and economic life, and thus aid her to achieve the glorious destiny of a true and unfettered democracy.

National Headquarters
633 Pennsylvania Avenue, NW
Washington, DC 20004

— Founder Mary McLeod Bethune's Pledge for NCNW

national council of negro women, inc.

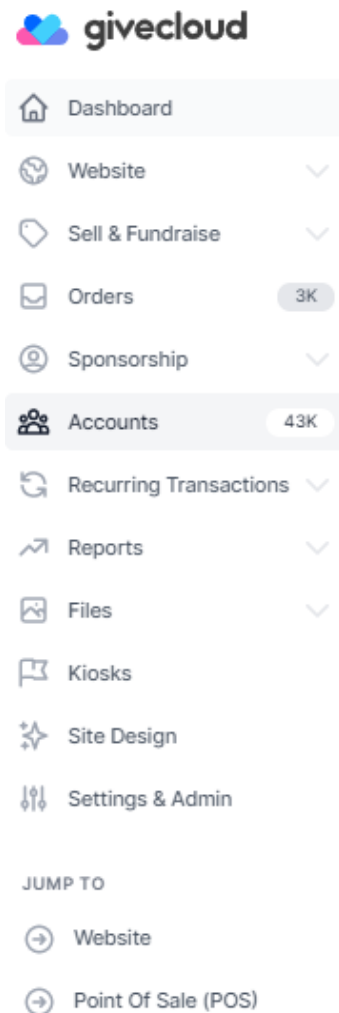Name: LaNita Freeman

Membership: Annual

Expire: September 30, 2021

JOHNNETTA BETSCH COLE, PH.D., *Chair & 7th National President*

"Leave No One Behind"

Renew an Active or Inactive Member

Select "Accounts" from the left control panel.

givecloud

- Dashboard
- Website
- Sell & Fundraise
- Orders   3K
- Sponsorship
- **Accounts**   43K
- Recurring Transactions
- Reports
- Files
- Kiosks
- Site Design
- Settings & Admin

JUMP TO
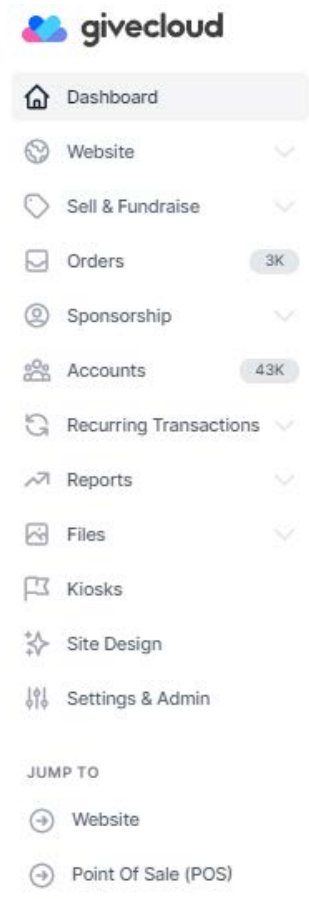
- Website
- Point Of Sale (POS)

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".
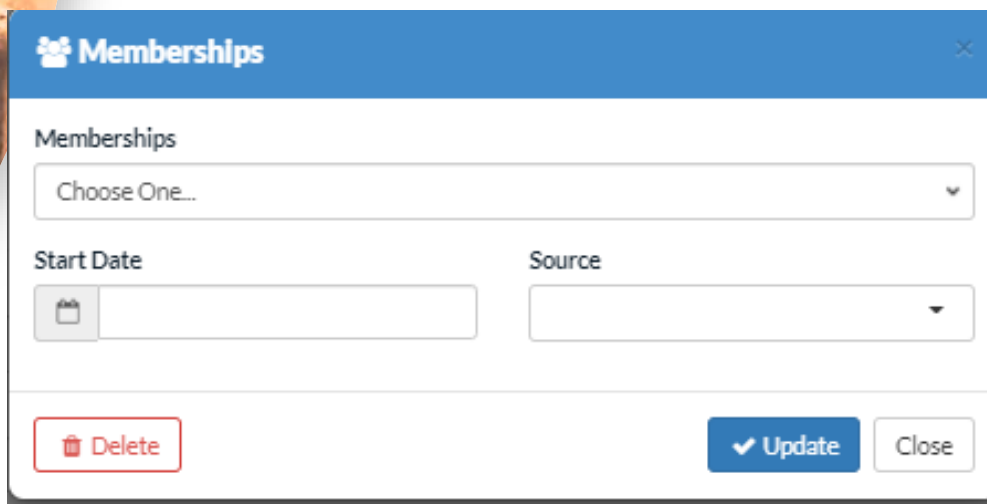
Add Member to a Section and/or Affiliate Organization (Cont'd.)

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.
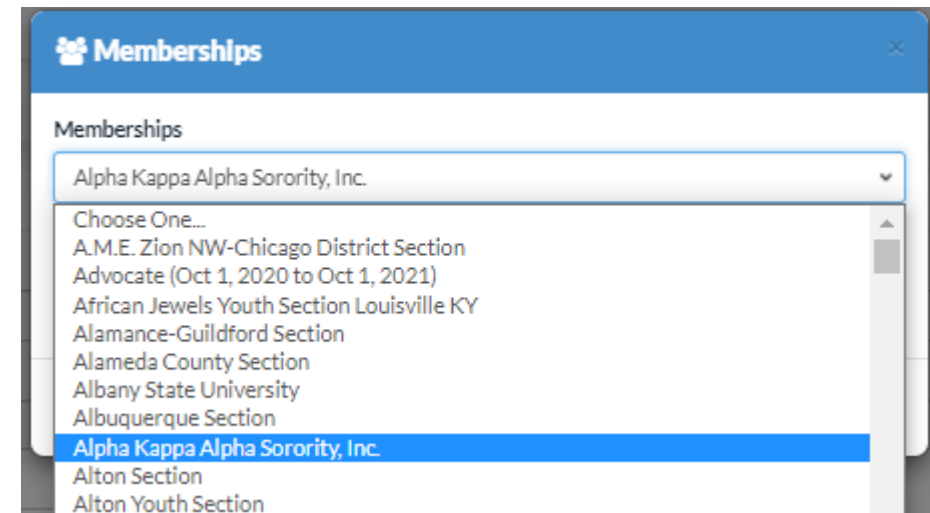
Add Member to a Section and/or Affiliate Organization (Cont'd.)

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.
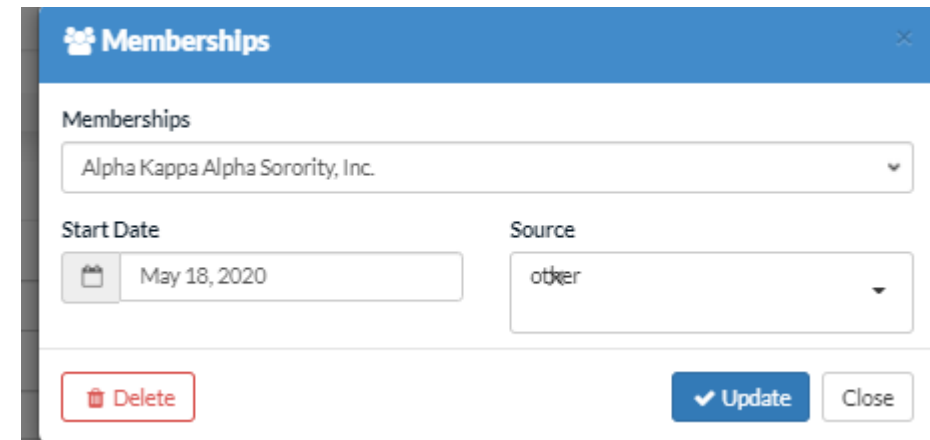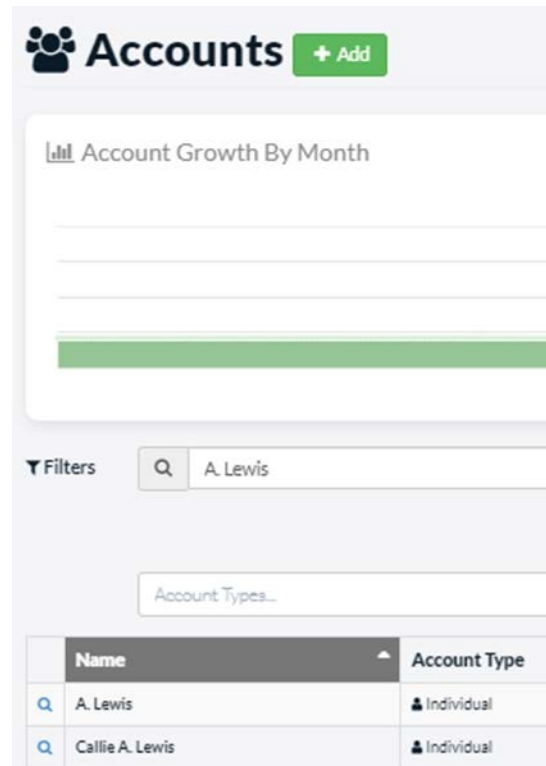
Review and Edit Member Record

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.
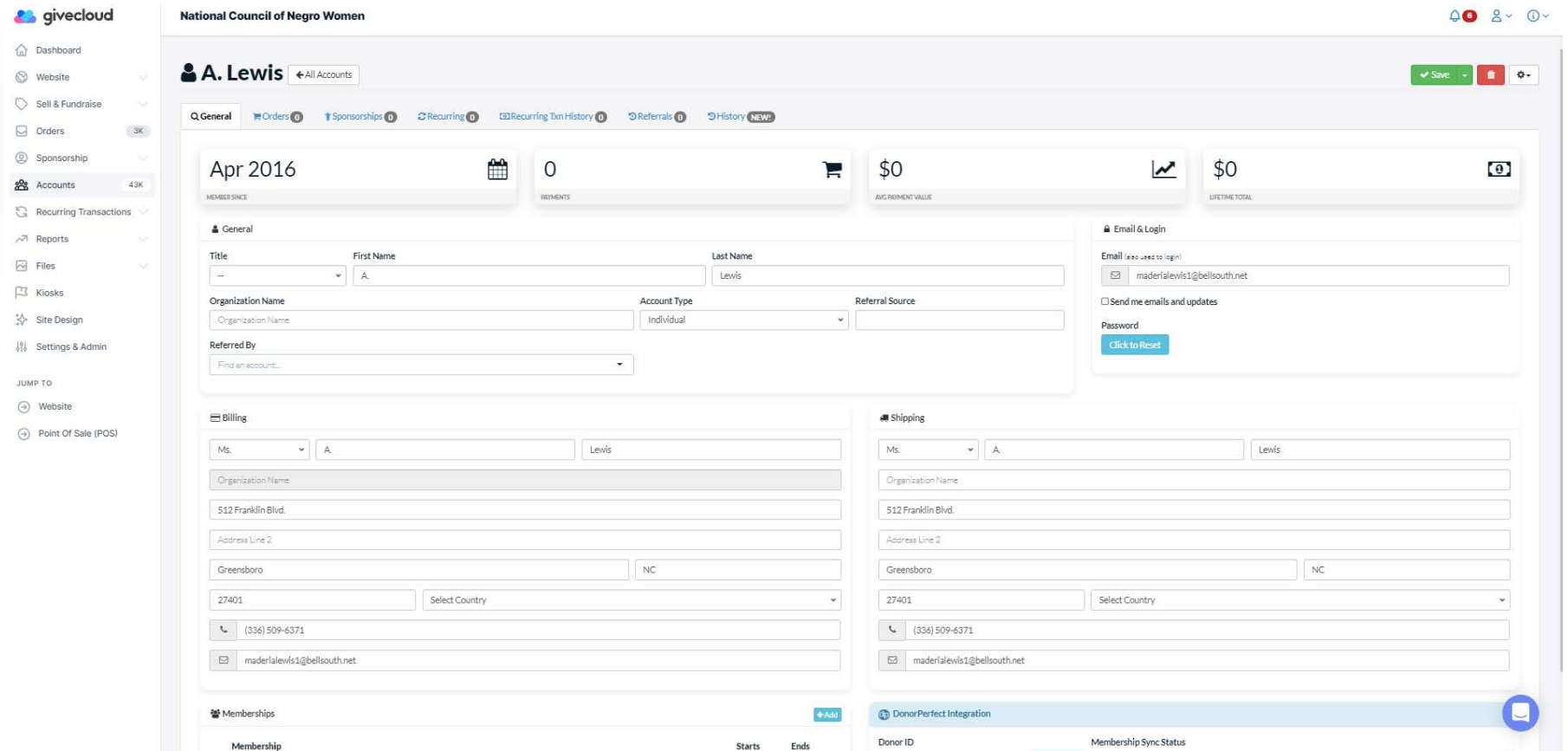
Review and Edit Member Record (Cont.d)

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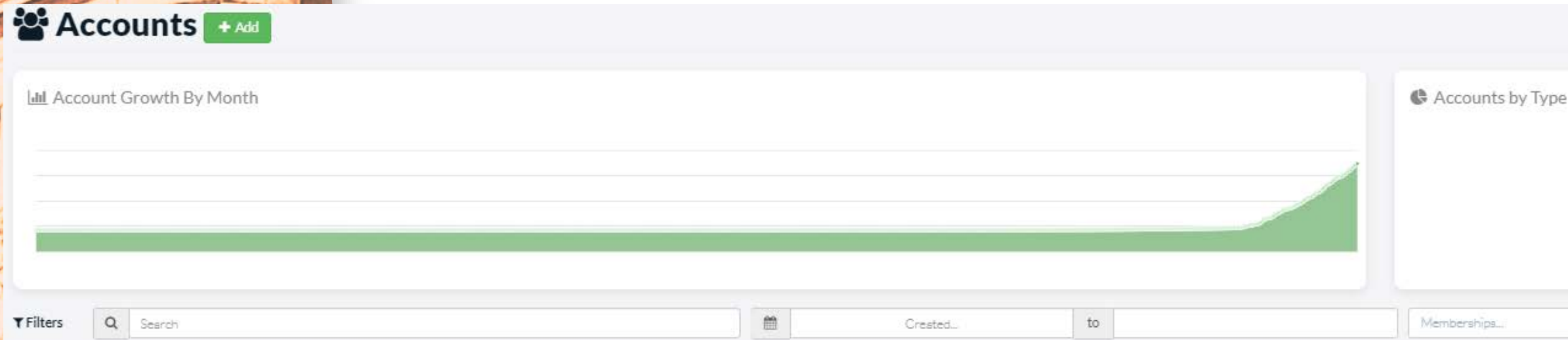
At this time, you can export a roster of your section members; however, you will have to do a lot of massaging and deleting to make the exported document data friendly. If you are familiar with Excel/CSV you should be able to do this, but it will be somewhat time consuming.

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.

Alton

Alton Section
Alton Youth Section

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

Name	Account Type	Source	Email
Angel Everage	Individual		angel-everage@att.net
Annie Johnson	Individual		a.johnson239@sbcglobal.net
Barbara Koontz	Individual		barbcan09@charter.net
Barbara Raglin	Individual		b.rag447@att.net
Betty J. Taylor	Individual		t.betty1936@yahoo.com
Bianca Jackson	Individual		msbiancarjackson@hotmail.com
Bonnie Fox	Individual		bfox9912@yahoo.com
Cameo Holland	Individual		cameo.foster@gmail.com
Candice Wallace	Individual		cwoo0923@hotmail.com
Carlita Tolbert	Individual		carlitatolbert@gmail.com
Carolyn Thompson	Individual		carolyn.thompson@dmh.mo.gov
Coena Royal	Individual		chinabiu@charter.net
Constance Slack	Individual		clcslack@yahoo.com
Crystal Robinson	Individual		robhaqq@hotmail.com
Damita Fielding	Individual		damita.fielding@yahoo.com

ncnw
commitment | unity | self reliance

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.
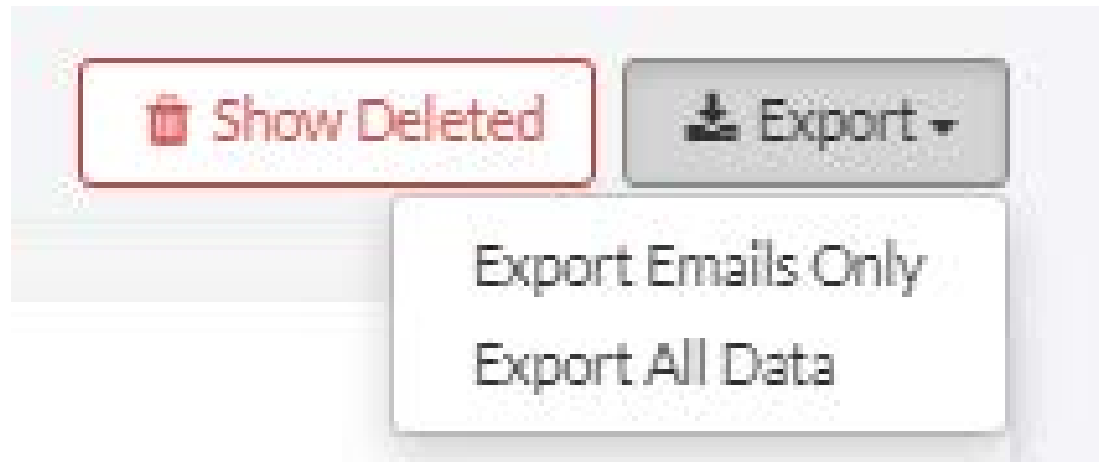
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January 14, 2021

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

Johnnetta Betsch Cole, Ph.D. **Chair and 7th National President**	**Janice L. Mathis, Esq.** **Executive Director**	**Krystal Ramseur, MPA** **Chief Administrative Officer**