



ncnw
commitment | unity | self reliance

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

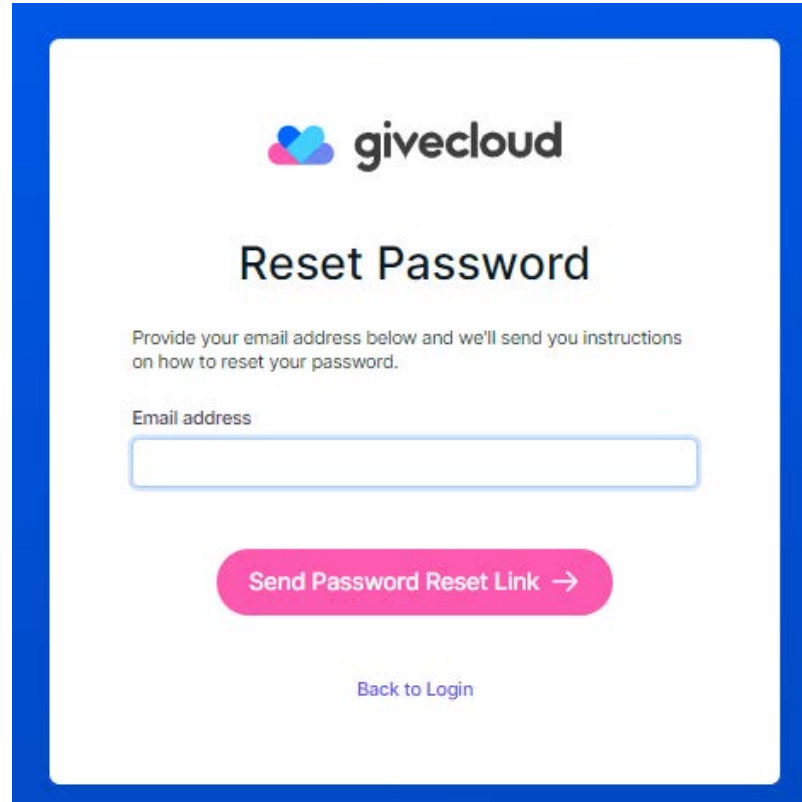
1. Online user accounts will be created for the following officers on record:
 - o State Presidents
 - o Section Presidents, 2nd Vice Presidents and Treasurers
2. Issue login account and password information which will be separate from your personal NCNW membership login account information before the 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:



 **givecloud**

Reset Password

Provide your email address below and we'll send you instructions on how to reset your password.

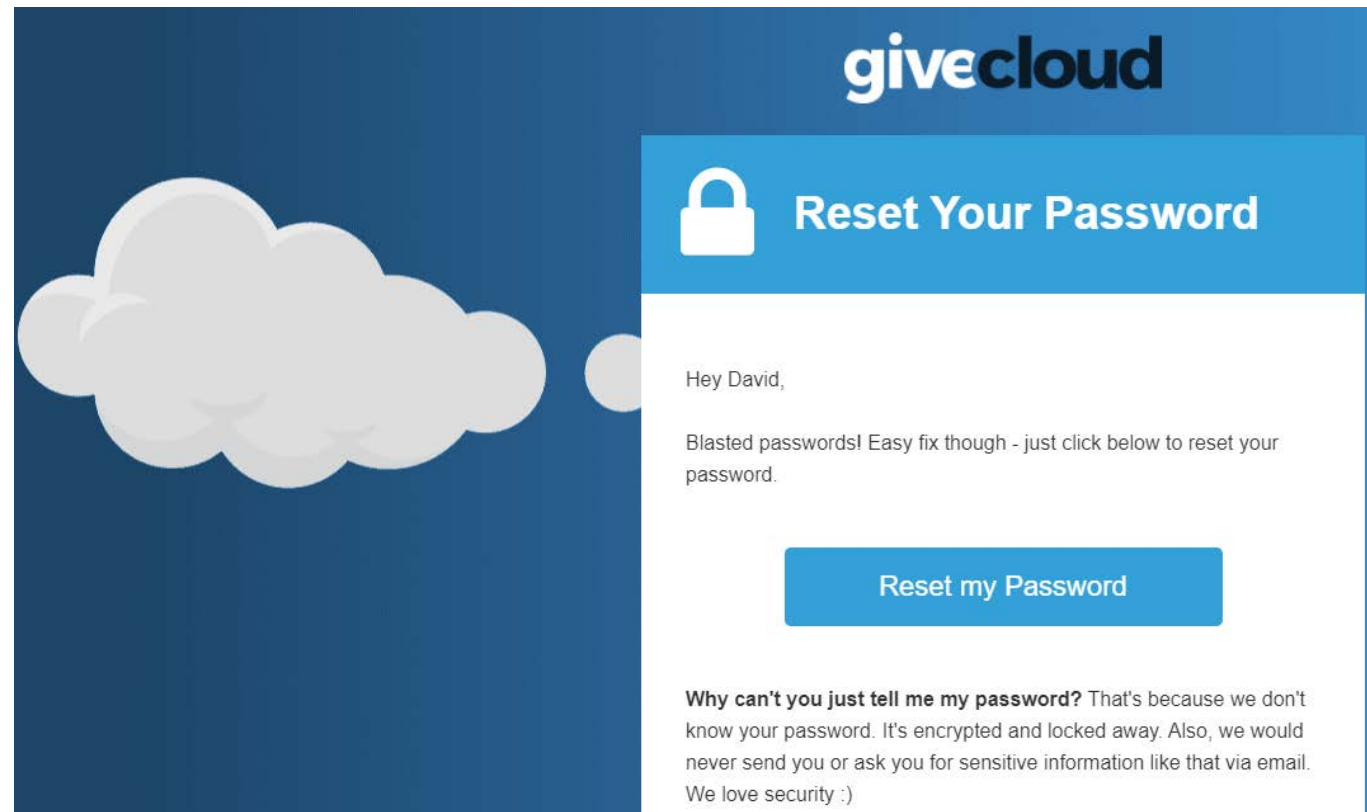
Email address

[Send Password Reset Link →](#)

[Back to Login](#)

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.

A screenshot of a web form titled "Reset Password" from Givecloud. The form is enclosed in a blue border. At the top center is the Givecloud logo, which consists of three overlapping circles in blue, green, and red, followed by the text "givecloud". Below the logo is the heading "Reset Password". The form contains three input fields: "Email address" with the value "dglenn@ncnw.org", "New Password" with a masked password ".....", and "Confirm New Password" which is currently empty. At the bottom center of the form is a red button with the text "Reset Password" and a right-pointing arrow.



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)

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)

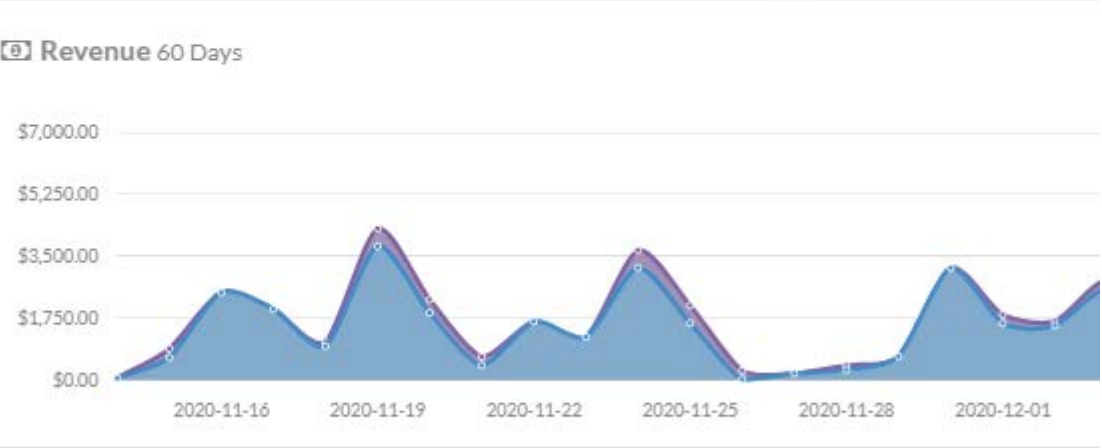
National Council of Negro Women

Dashboard

3.1K  **\$24.6K**


INCOMPLETE ORDERS REVENUE IN JANUARY

Revenue 60 Days



Date	Revenue
2020-11-16	\$1,500.00
2020-11-19	\$4,000.00
2020-11-22	\$1,000.00
2020-11-25	\$3,500.00
2020-11-28	\$1,000.00
2020-12-01	\$2,500.00

Today's Engagement





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.

A screenshot of the NCNW website's 'My Account' login page. The page has a purple header with the text 'My Account' in white. Below the header, the text 'Welcome Back!' is centered. Underneath, there is a white login form with a purple border. The form has a title 'Login' and two input fields: 'Email' with the address 'dglenn@ncnw.org' and 'Password' with a masked password of ten dots. A purple 'Sign-In' button is located at the bottom of the form.



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

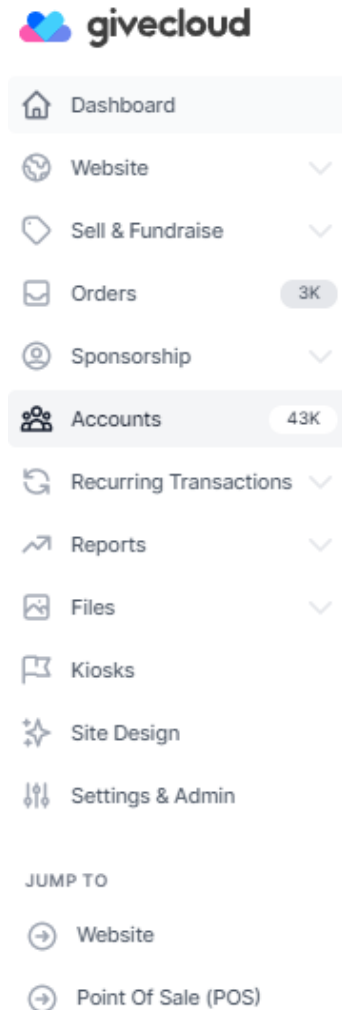
Administrator Accounts

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”.



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:

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.)

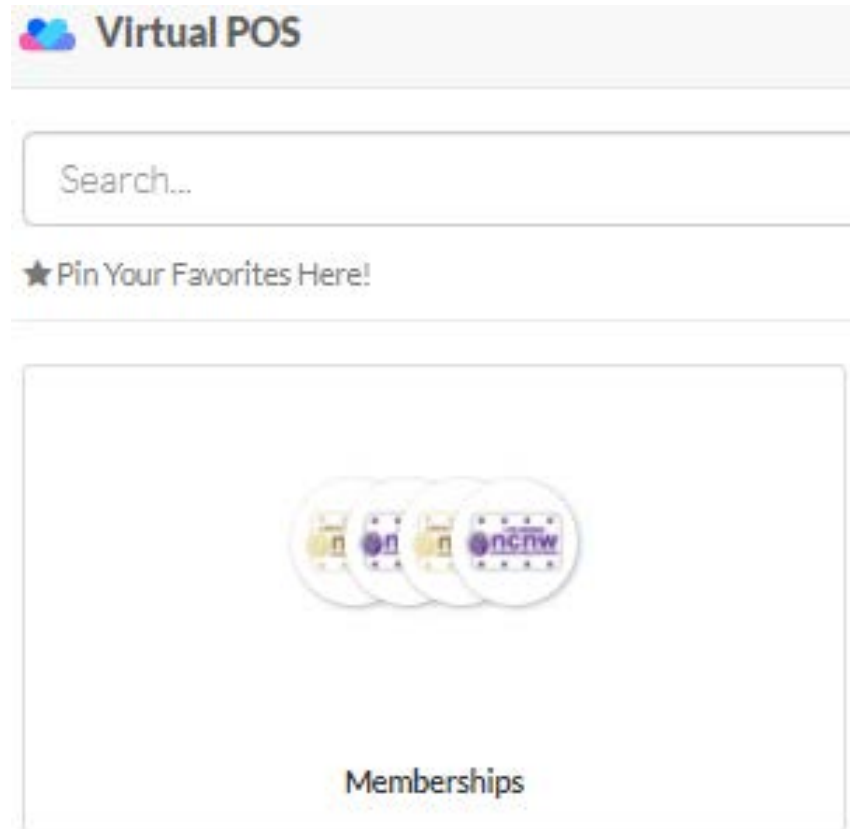
Once all of the general information (name, address, phone and email address) has been entered click "Save" found at the top right.



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 Life Member
MEM-ASSOCIATE LIFE
\$500.00



Group Lifetime
MEM-GRP LIFE
\$750.00



Leadership Circle
MEM-LEAD
\$150.00



Legacy Life
MEM-LEGLIFE
\$1,000.00




Lifetime
MEM-LIFE
\$500.00



Student (Collegiate 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.

Annual MEM-ANNUAL x

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-Guildford 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.

The Links, Incorporated and Links Foundation, Incorporated

Top Ladies of Distinction, Inc. (TLOD)

Women's Home & Overseas Missionary Society, AME Zion

Women's Missionary Society, AME Church

Women's Missionary Council, CME Church

Zeta Phi Beta Sorority, Inc.

[DonorPerfect Overrides](#)

✓ Add



Purchase New Membership (Cont'd.)

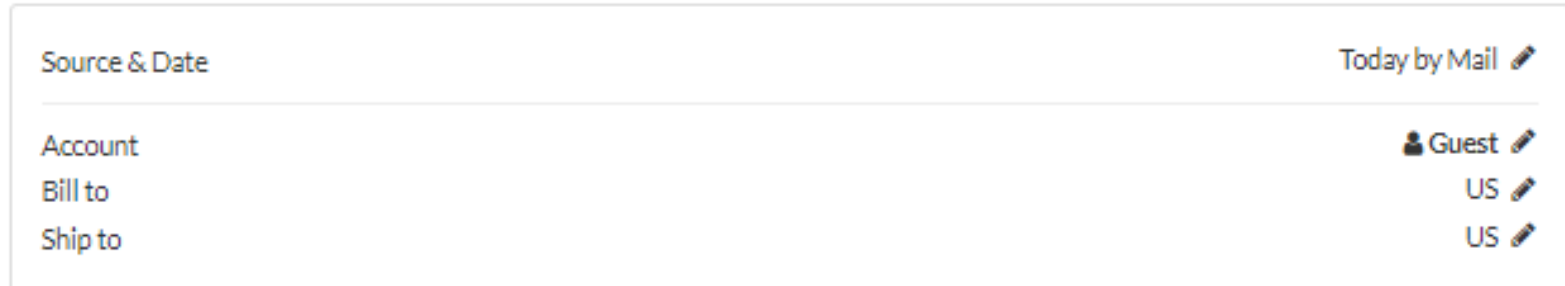
Now the new membership is in your shopping cart:

A screenshot of a shopping cart interface. At the top, it says 'Shopping Cart 1'. Below that, there is a single item: 'Annual - Recurring' with a small circular icon to its left and 'MEM-ANNUAL' in smaller text below it. The price '\$50.00 x' is shown to the right of the item name. Below the item list, there is a summary section with a white background and a thin border. It lists: 'Subtotal \$50.00', 'Shipping Free Shipping \$0.00', 'Tax \$0.00', and 'Grand Total \$50.00'. At the bottom of the summary, there is a 'Promotions' section showing '\$0.00'.

Item	Price
Annual - Recurring (MEM-ANNUAL)	\$50.00
Subtotal	\$50.00
Shipping (Free Shipping)	\$0.00
Tax	\$0.00
Grand Total	\$50.00
Promotions	\$0.00

Purchase New Membership (Cont'd.)

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



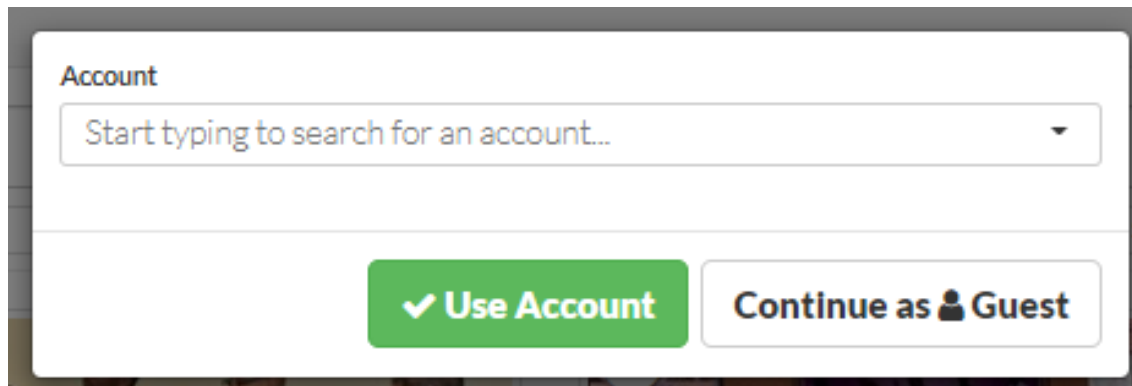
Source & Date Today by Mail ✎

Account 👤 Guest ✎

Bill to US ✎

Ship to US ✎

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



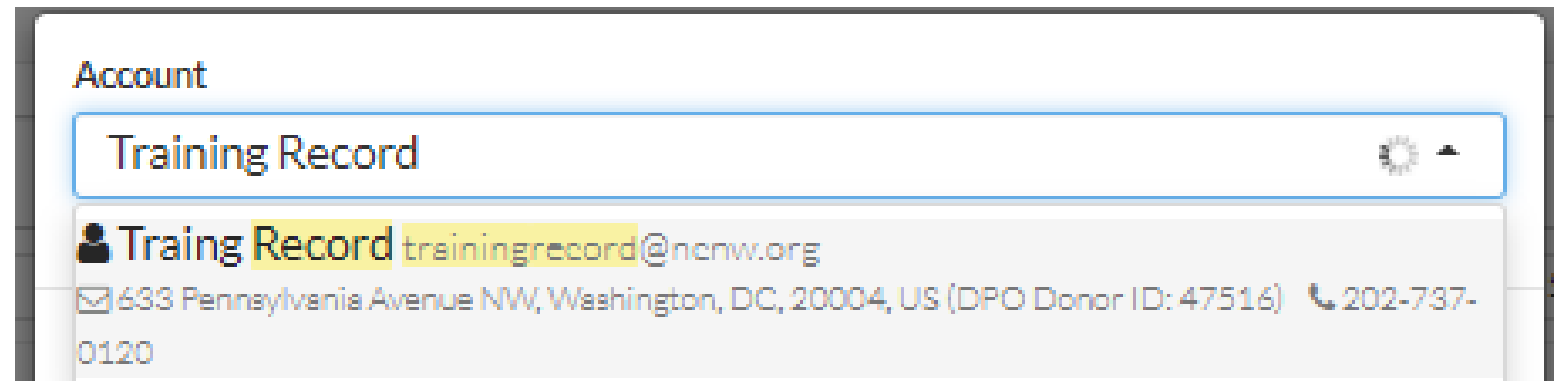
Account

✓ 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".

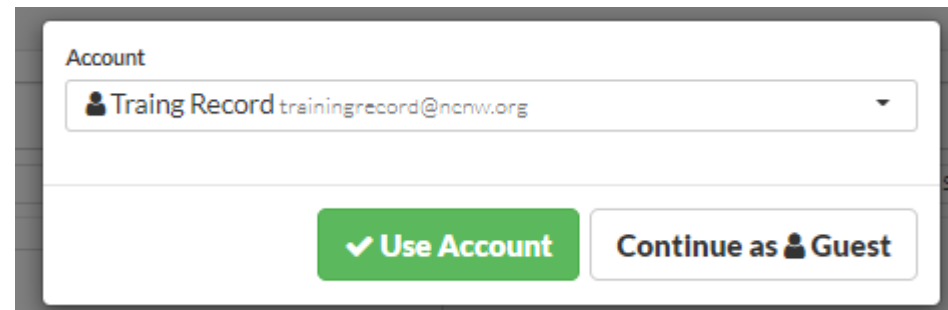


Account


Training Record


 Traing Record trainingrecord@ncnw.org

 633 Pennsylvania Avenue NW, Washington, DC, 20004, US (DPO Donor ID: 47516)  202-737-0120








Account

 Traing Record trainingrecord@ncnw.org

Use Account Continue as  Guest

Purchase New Membership (Cont'd.)

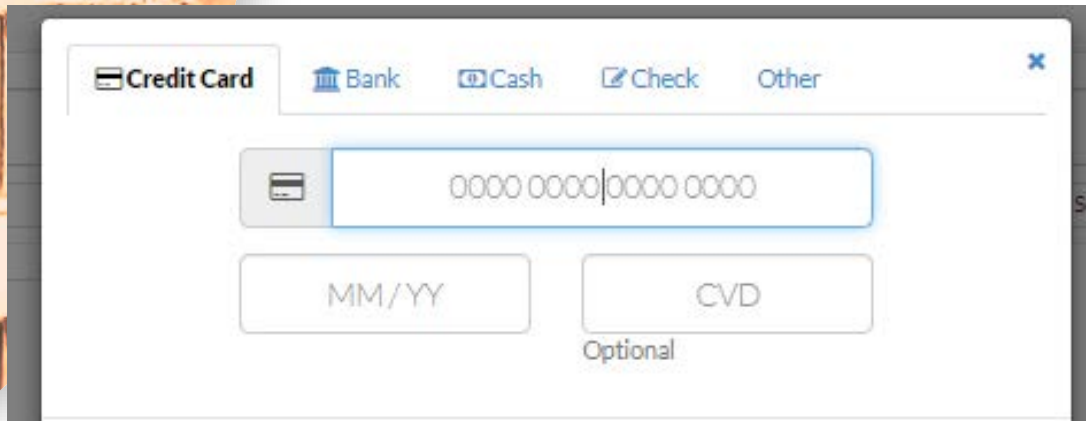
My new member's name and contact information now shows at the bottom of the shopping cart. Review the information for correctness. You can also make changes/corrections to the name and contact info here by clicking on the pencil symbol to the right of the name and contact information. Click on "Complete 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 

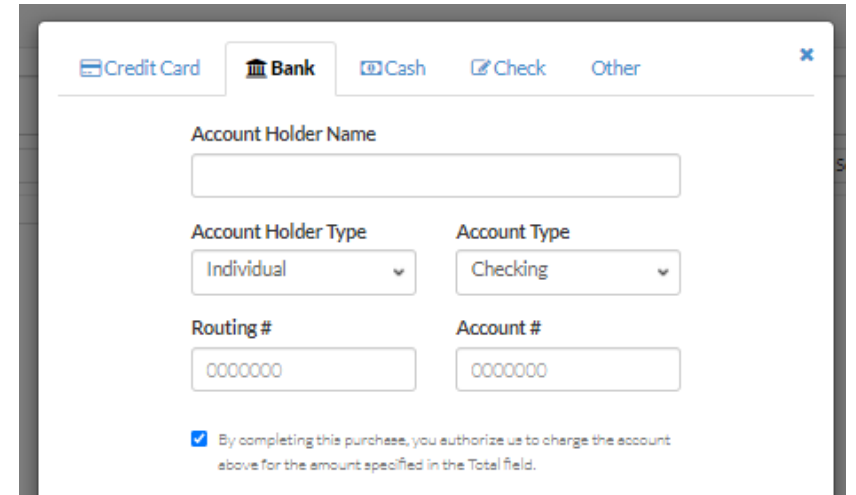
✓ Complete Order

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.



This screenshot shows the 'Credit Card' payment tab selected. The interface includes a navigation bar with tabs for 'Credit Card', 'Bank', 'Cash', 'Check', and 'Other'. Below the navigation bar, there is a card number input field with a card icon on the left and the placeholder '0000 0000 | 0000 0000'. Below the card number field are two input fields: 'MM/YY' and 'CVD', with the 'CVD' field labeled as 'Optional'.



This screenshot shows the 'Bank' payment tab selected. The interface includes a navigation bar with tabs for 'Credit Card', 'Bank', 'Cash', 'Check', and 'Other'. Below the navigation bar, there are four input fields: 'Account Holder Name', 'Account Holder Type' (with a dropdown menu showing 'Individual'), 'Account Type' (with a dropdown menu showing 'Checking'), 'Routing #' (with the value '0000000'), and 'Account #' (with the value '0000000'). At the bottom, there is a checked checkbox with the text: 'By completing this purchase, you authorize us to charge the account above for the amount specified in the Total field.'

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.

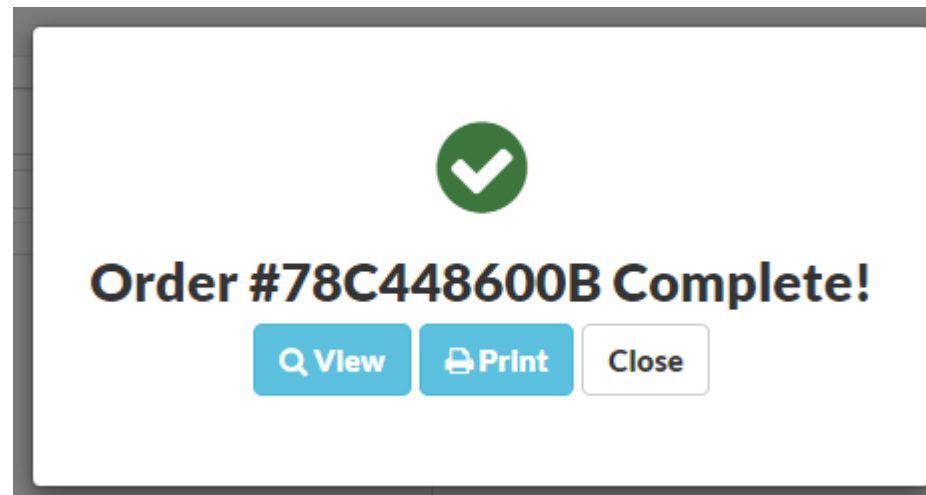
Mark order as completed.

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.





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

Sincerely,

David Glenn, Jr., Membership Director

NATIONAL COUNCIL OF NEGRO WOMEN, INC.



National Headquarters
633 Pennsylvania Avenue, NW
Washington, DC 20004

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.

—*Founder Mary McLeod Bethune's Pledge for NCNW*



Name: LaNita Freeman

Membership: Annual

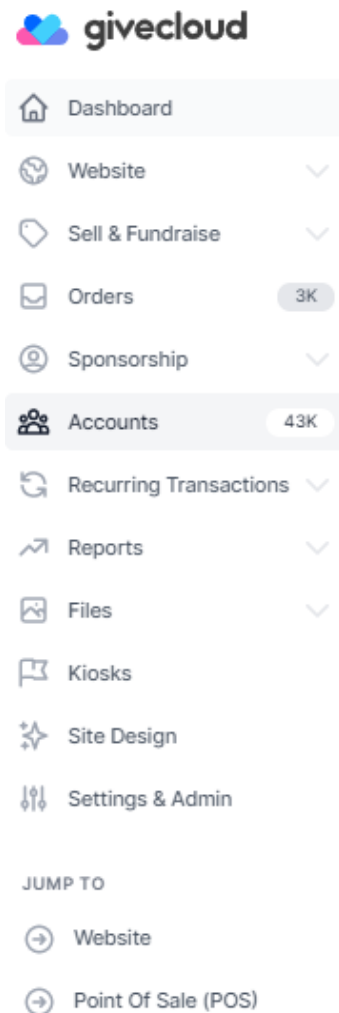
Expire: September 30, 2021

JOHNETTA 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.



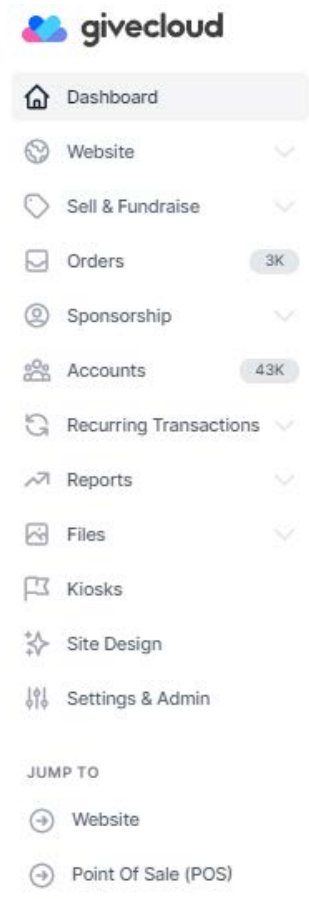


Renew an Active or Inactive Member (Cont'd.)

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.



Accounts + Add

Account Growth By Month

Filters

Account Types...



Name	Account Type
<input type="checkbox"/> A. Lewis	<input type="checkbox"/> Individual
<input type="checkbox"/> Callie A. Lewis	<input type="checkbox"/> Individual

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

Go to Memberships. Click on "Add".

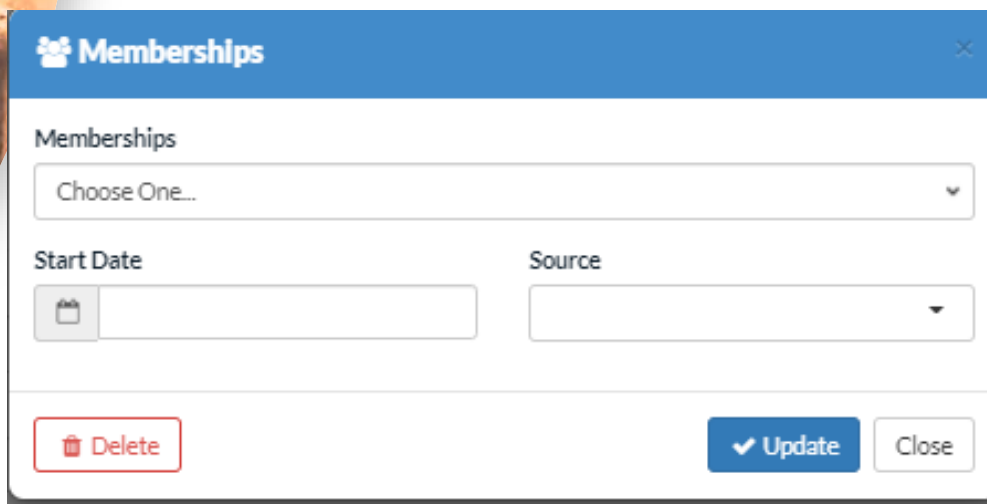
 Memberships

[+ Add](#)

Membership	Starts	Ends
 Annual	Apr 13, 2016	Sep 30, 2017
 Metropolitan Greensboro Area Section	Apr 13, 2016	N/A

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.



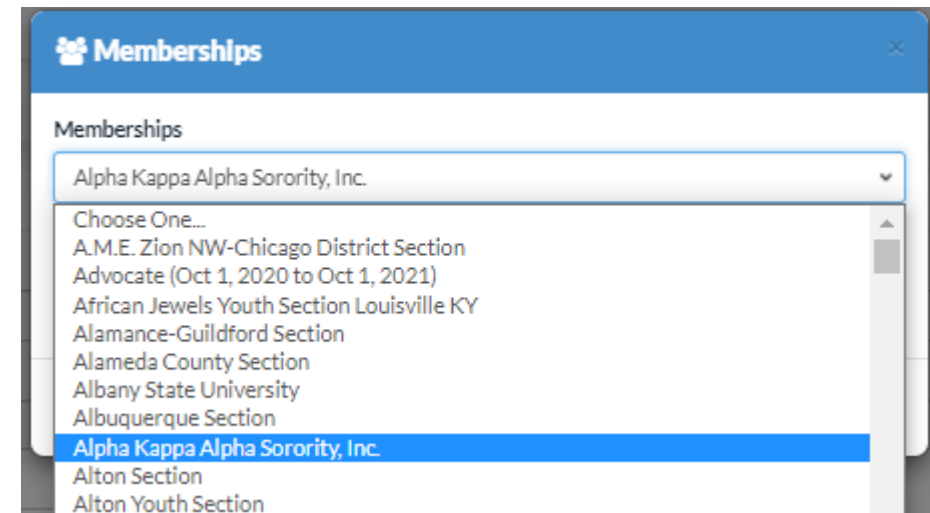
Memberships

Memberships

Choose One...

Start Date

Source



Memberships

Memberships

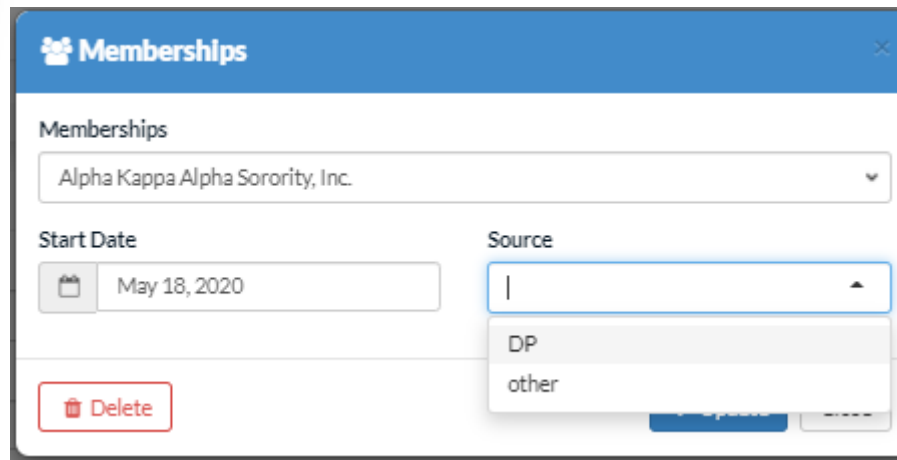
Alpha Kappa Alpha Sorority, Inc.

Choose One...

- A.M.E. Zion NW-Chicago District Section Advocate (Oct 1, 2020 to Oct 1, 2021)
- African Jewels Youth Section Louisville KY
- Alamance-Guildford Section
- Alameda County Section
- Albany State University
- Albuquerque Section
- Alpha Kappa Alpha Sorority, Inc.**
- Alton Section
- Alton Youth Section

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.



Memberships

Memberships

Alpha Kappa Alpha Sorority, Inc.

Start Date

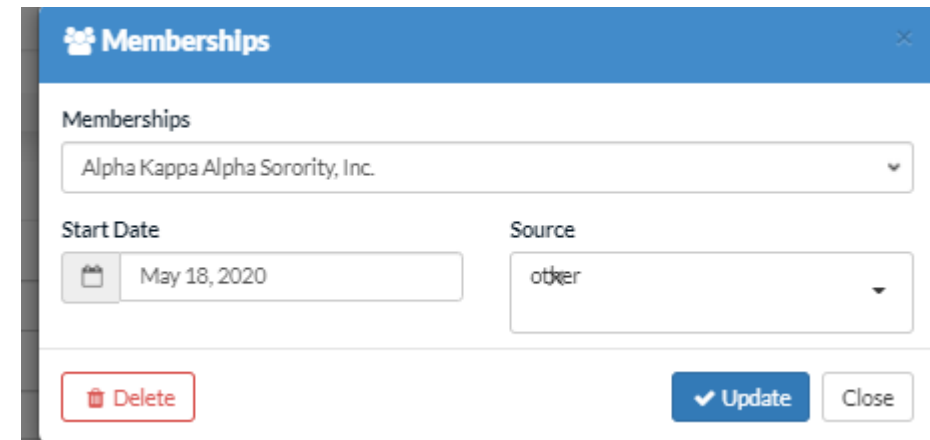
May 18, 2020

Source

DP

other

Delete



Memberships

Memberships

Alpha Kappa Alpha Sorority, Inc.

Start Date

May 18, 2020

Source

other

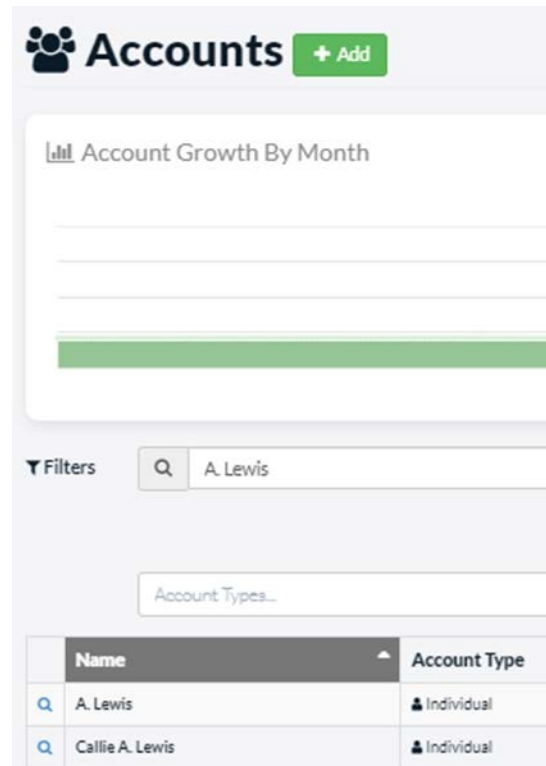
Delete

Update

Close

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.



Accounts + Add

Account Growth By Month

Filters

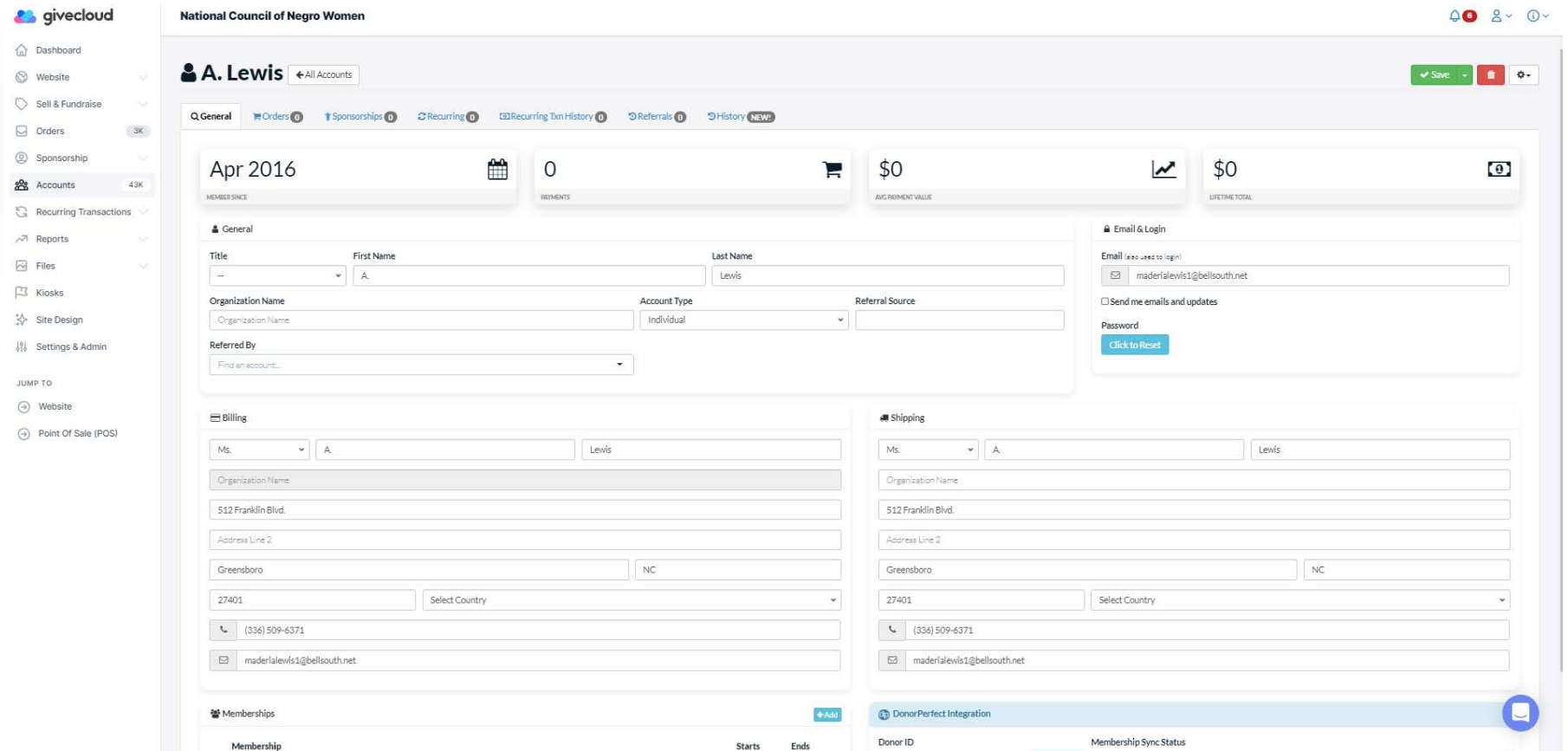
Q A. Lewis

Account Types...

Name	Account Type
Q A. Lewis	Individual
Q Callie A. Lewis	Individual

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.



The screenshot shows the Givecloud interface for editing a member record. The page title is "National Council of Negro Women" and the member name is "A. Lewis". The interface includes a sidebar with navigation options like Dashboard, Website, and Accounts. The main content area displays a summary of the member's status for April 2016, including membership since, payments, average payment value, and lifetime total. Below this, there are several sections for editing the member's information:

- General:** Fields for Title, First Name (A.), Last Name (Lewis), Organization Name, Account Type (Individual), Referral Source, and Referred By.
- Billing:** Fields for Title, First Name, Last Name, Organization Name, Address (512 Franklin Blvd., Greensboro, NC 27401), Phone ((336) 509-6371), and Email (maderialewis1@bellsouth.net).
- Shipping:** Identical fields to the Billing section.
- Email & Login:** Fields for Email (maderialewis1@bellsouth.net) and a checkbox for "Send me emails and updates".
- Memberships:** A table with columns for Membership, Starts, and Ends.
- DonorPerfect Integration:** Fields for Donor ID and Membership Sync Status.

A "Save" button is located in the top right corner of the record page.

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.

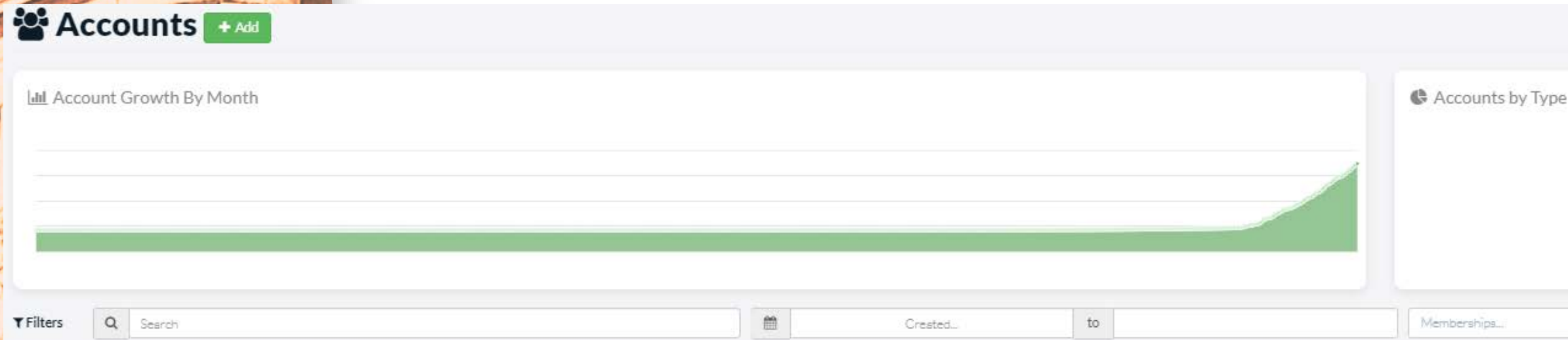
At this time, you can export a roster of your section members; however, you will have to do a lot of massaging and deleting to make the exported document data friendly. If you are familiar with Excel/CSV you should be able to do this, but it will be somewhat time consuming.

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:



The screenshot shows a web interface for managing accounts. At the top left, there is a header with the text "Accounts" and a green "+ Add" button. Below this is a large area containing a chart titled "Account Growth By Month" with a green area chart showing an upward trend. To the right of the chart is a sidebar titled "Accounts by Type". At the bottom of the interface is a filter bar. It starts with a "Filters" dropdown, followed by a search input field with a magnifying glass icon and the text "Search". To the right of the search field is a date range selector with a calendar icon, the text "Created...", a "to" label, and another empty input field. Further right is a field labeled "Memberships...".

Export Roster of Members (Cont'd.)

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

Alton Section

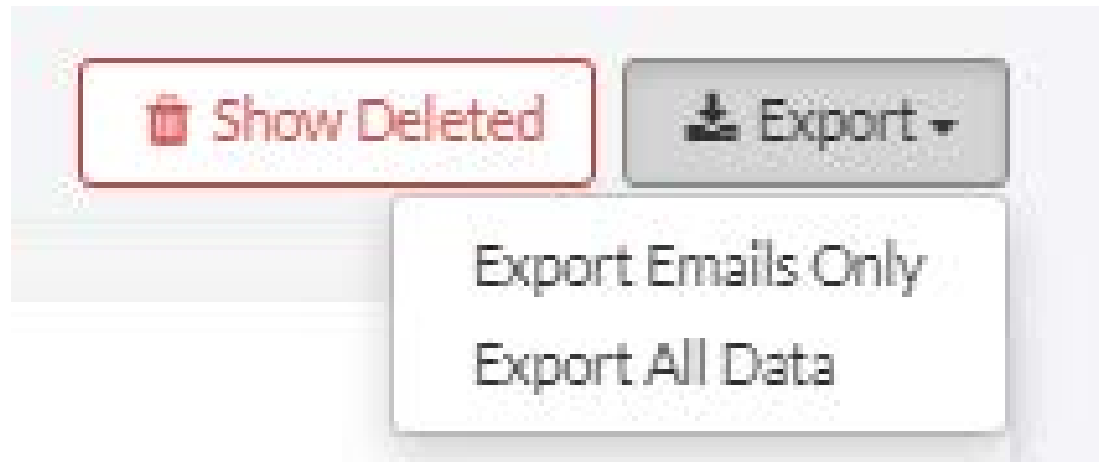
Alton Youth Section

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		clslack@yahoo.com
Crystal Robinson	Individual		robhaqq@hotmail.com
Damita Fieldino	Individual		damita_fieldino@yahoo.com

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.





NCNW MEMBERSHIP ADMINISTRATORS WEBINAR

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!

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