

MEMBERSHIP ADMIN GUIDE

Bob Bedoll. 1/20/19. Rev 5/29/19.

INTRODUCTION

This guide covers the AI membership system. The system is used by AIHS and AICC to maintain membership records. The examples in this guide are for AIHS, but the AICC pages are almost identical, except for the color.

The Membership records are kept in a database on the Anderson-island.org website, which also hosts the Anderson Island Assistant and the Anderson Island Historical Society.

The database details are listed in Appendix A. Each member is recorded as one record (one row) in the database. The database records: member id, first name, last name, full address, year the membership is paid through (or 'life'), phone numbers, email address, and payment information for membership, garden plots, and additional contributions.

All interaction with the database is through the two web site control panels described in this guide: Member Control Panel, and Admin Control Panel. All new memberships and renewals can be handled through the Member Control Panel. Reporting and record updates are handled through the Admin Control Panel.

NOTE: An easy way to find out if a member is paid up is to just click on "JOIN/RENEW" in the main menu of the website. Then enter the user's last name. A list of users will come up, and it will tell you the year they are paid up through.

MEMBER CONTROL PANEL

AIHS: www.andersonislandhs.org then click on "JOIN/RENEW" in the menu.

AICC: www.andersonislandcc.org then click on "JOIN/RENEW" in the menu.

Anderson Island Historical Society
Membership Menu

Please make your selection below

NEW MEMBERS

[NEW MEMBER SIGNUP](#)

EXISTING MEMBERS: Renew, Reserve a Garden plot, or Donate.

Help us locate your member information.
Enter your Last Name, or Email address, or Phone number (10 digits), or Member ID (2-4 digits)

[FIND ME](#)

AIHS Adminsrators: [AIHS Administrator Menu](#)

TO RENEW A USER OR RESERVE A GARDEN PLOT or record a contribution:
This will also quickly tell you if a user is paid up.

1. Enter the member's last name (e.g. Bedoll, or Bed), or email address (e.g. bedoll@gmail.com), or phone number (10 numeric digits only, e.g. 2538841319) or member id (3 or 4 numeric digits e.g. 778).

Help us locate your member record.
Enter email address or Phone number (10 digits) or Last Name or Member ID (3-4 digits):

[FIND ME](#)

2. Click on **FIND ME**. This will look up the member in the database.
3. If there is more than one member that matches, you will get a list of members. Click on the correct one.

AIHS Membership Renewal

There are 5 members that match anderson. Please click on the row for you:

Member id	Last name	First name	Paid Through	Address	City	State	Zip	e
777	Anderson	Deborah	Life	57 Hewitt Dr.	Steilacoom	WA	98388	
778	Anderson	Susan	2018	10613 Narrows Dr.	Anderson Island	WA	98303	
779	Anderson	Randy	Life	12024 Eck-Johnson Rd.	Anderson Island	WA	98303	r
780	Anderson	Rick & Melissa	Life	11407 Old Brolin Pl.	Anderson Island	WA	98303	r
781	Anderson	Thomas & Kathryn	Life	633 N Mildred St. #C	Tacoma	WA	98405	

4. You will get the renewal page. Select RENEW or NO RENEWAL.
Check the garden plot checkbox if a garden plot is being reserved, and fill in any additional contribution amount (above the amount for renewal and garden plots).

AIHS Membership Renewal

Member 778:
Susan Anderson
10613 Narrows Dr.
Anderson Island, WA 98303
,

Your membership has not yet been paid for 2019. Please renew.
Your garden plot has not yet been paid for 2019.

Membership

Please select: ☒ Renewal for 2019 (\$20). ☐ No renewal (\$0).

Check if you are paying for a Community Garden Plot (\$40): ☐
(Please check with Garden Manager Sue Huseby (253-884-0795) to ensure a plot is available.)

Optional Additional Contribution \$

Please update your Email address if it is incorrect

Payment

☐ I will pay online with a credit card
☒ I have paid by check. (Admin pw is required:)
To pay by mail, mail your check to "Membership,AIHS,9306 Otso Point Rd, Anderson Island WA 98303".

Submit

5. If the user has paid by check or cash, select the 'Paid by Check' button and enter the admin password. Then click on **SUBMIT**. (If the member wants to pay by credit card, select "I will pay online". In the next screen you will be prompted to enter the credit card information.

6. You will get a second page. Click on **CONTINUE**.

Anderson Island Historical Society

AIHS Membership renewal

Amount:
Membership renewal: \$ 20

TOTAL: \$20

If a check has been submitted for \$20, please proceed to the next step.

Continue ->

7. You will get an acknowledgement page. An email will be sent to you and the user. Also a printable membership card will be emailed to the user. You should also give them or mail them a pre-printed membership card through US Mail.

Anderson Island Historical Society Membership

Updated TEST Bedoll ID=1150

AIHS RECEIPT. 01/21/2019 22:57:40

TEST Bedoll, Thank you for your renewal. You have given us a check for \$20.
Your renewal has been forwarded to our membership chairman.

Your newsletter will be mailed to:
TEST Bedoll
11002 48TH STREET CT E
Edgewood, WA 98372
support@postersw.com
Testing dates. should be no update..

Amount:
Membership renewal: \$ 20

TOTAL: \$20

To view your updated member information, click here.
For support, please email AIHSmembership@anderson-island.org.

Thank you,
Anderson Island Historical Society

[Click here to download your AIHS membership card.](#)
Please print it out and sign it. It is good for a 10% discount on all purchases at the AIHS Museum Store Gift Shop.

Print Receipt

An email with your receipt and Membership Card (membershipcard2019.pdf) was sent to support@postersw.com.

TO ADD A NEW USER:

1. Click on NEW MEMBER SIGNUP.
2. You will get the new member page. Fill in all the relevant fields. Be sure to indicate if you are paying for a garden plot.

Membership

☒ New Membership (\$20) ☒ Check if you are paying for a Community Garden Plot (\$40) (Please check with Garden Manager Don Hickey (235-554-0499) to ensure a plot is available)

Optional Additional Contribution \$

Name and Address

First Name (for multiple names e.g. John Doe and Susan Fox, set first name = "Susan Fox & John" and set last name to "Doe")

Last Name

Address line 1

City

State

Zip

Phone #1 (10 digit number with area code, digits only)

Phone #2 (10 digit number with area code, digits only)

Email address

Additional Notes or Instructions

Payment

☐ I will pay online with a credit card.

☐ I will mail a check. Your membership will be processed once the check is received.

☐ I have paid by check. (Admin pw is required:

3. Select the proper payment method: *By Check* if the member has given you a check (requires the admin password), or *By Credit Card*.
4. If paying by Credit card, you will be prompted to enter the credit card info.
5. After you click **SUBMIT**, the member will be added and you will get a confirmation. An email will be sent to the member.

ADMIN CONTROL PANEL.

To open the admin panel: From the main website, click on Join/Renew. At the bottom of the page will be a link to the Membership Admin Page.

Anderson Island Historical Society
Membership Menu

Please make your selection below

NEW MEMBERS
NEW MEMBER SIGNUP

EXISTING MEMBERS: Renew, Reserve a Garden plot, or Donate.
Help us locate your member information.
Enter your Last Name, or Email address, or Phone number (10 digits), or Member ID (2-4 digits)

FIND ME

AIHS Adminsitrators: AIHS Administrator Menu

This will open the ADMIN Login panel. Enter the admin user id and password. This will bring up the membership admin page.

AIHS MEMBERSHIP ADMIN PAGE

AIHS membership administrator page.

NEW MEMBER SIGNUP
ADD NEW MEMBER

EXISTING MEMBERS: Renew, Reserve a Garden plot, or Contribute.
Enter email address or Phone number (10 digits) or Last Name or Member ID (3-4 digits): bedoll

FIND MEMBER

REPORTS
Generate an online report which can be viewed or printed:
REPORT - ALL REPORT - PAID

Export a CSV file which can be viewed/printed in a spreadsheet, or used for mail-merge:
EXPORT - CSV - ALL EXPORT - CSV - PAID

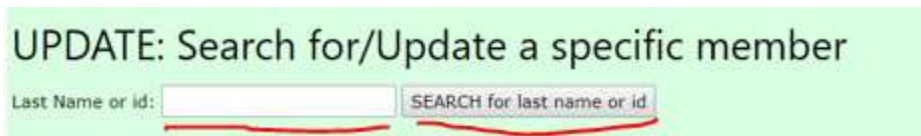
UPDATE: Search for/Update a specific member
Last Name or id: SEARCH for last name or id

The ADMIN CONTROL PANEL has 5 sections:

1. **NEW MEMBER SIGNUP: ADD NEW MEMBER.** This button is the same as the USER CONTROL PANEL, and bring up the same form. This is the only way to ADD a new user by credit card or by check or cash.
2. **EXISTING MEMBER RENEW...** The FIND button is the same as the USER CONTROL PANEL. It should be used to find an existing user – then you can mark them as renewed, or paying for a garden plot, or contributing.
3. **REPORTS.** These buttons generate various reports, and can export a CSV file. The CSV file can then be opened in Excel, and searched and manipulated, and used to print labels using MS Word Mail Merge.
4. **UPDATE.** The SEARCH button searches for a user. You can then update the user change any user information. You could also mark them as renewed, or reserve a garden plot, or make a contribution.
5. **SEND EMAIL TO MEMBERSHIP.**
This button will send the email message to all users.

ADMIN FUNCTIONS

1. **ADD A NEW USER.**
Push the ADD NEW MEMBER button. This identical to the NEW MEMBER SIGNUP button described above.
2. **RENEW MEMBERSHIP or PAY FOR A GARDEN PLOT or RECORD A CONTRIBUTION:**
This is identical to the FIND ME button on the MEMBER CONTROL PANEL. Follow the instructions above on page 2.
3. **VIEW and UPDATE USER INFORMATION.**

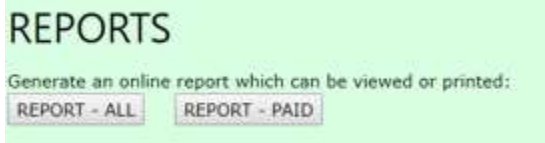


UPDATE: Search for/Update a specific member

Last Name or id:

Enter the user's last name (or phone number, or email address, or member id) into the lower search box and click on SEARCH. You will get a list of users with ALL their member information. Then select the correct user – the member's current information appears. Make any necessary corrections, and then press UPDATE. The user's information will be updated.

4. **GENERATE A LIST OF MEMBERS as a TABLE.**



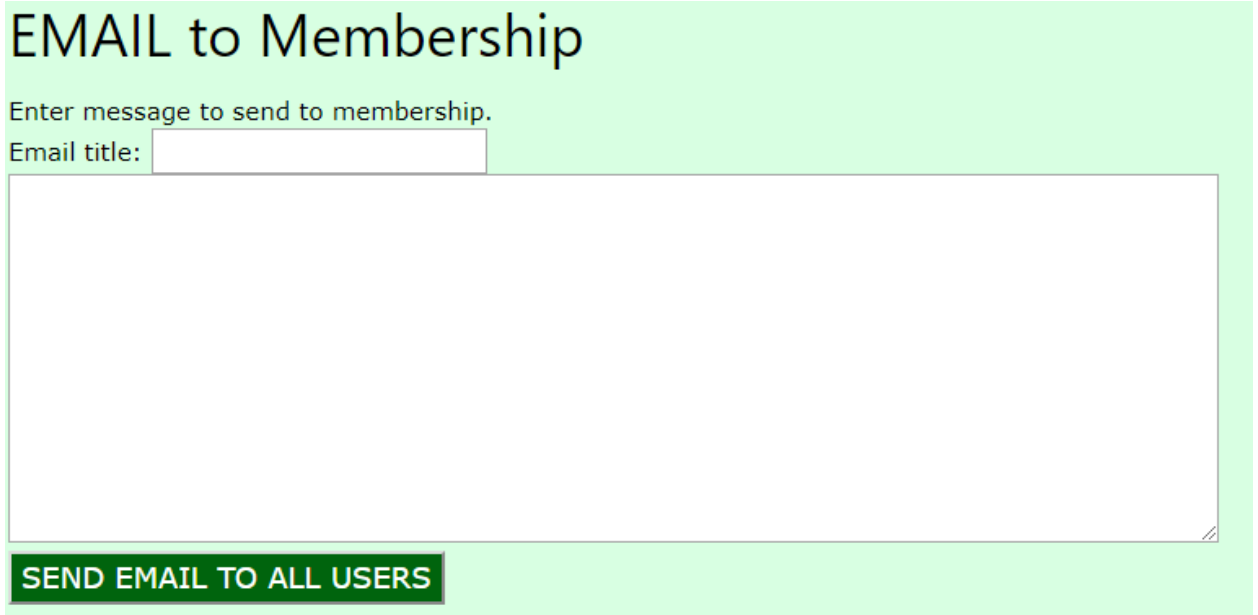
Push the Report button. You will get a list of members. You can then print this list using the browser's PRINT function.

5. **GENERATE A SPREADSHEET OF MEMBERS.**



Push the EXPORT CSV button. This will download a csv file to your machine. Find the file in your 'downloads' section, and double click on it. It will open MS Excel with the members loaded. You can then sort, print, or use this spreadsheet to generate mail-merge labels or mail letters.

6. **SEND EMAIL TO MEMBERS – USE WITH CAUTION.**



CAUTION: THIS SENDS AN EMAIL TO ALL USERS, BOTH PAID AND UNPAID.

Set a Title and email message in the admin appropriate boxes. Then click on SEND EMAIL. The email will be sent to all members on the membership roles, even if they are not paid up. Members who have not paid for this year will also get a reminder to renew.

APPEXDIX A – DATABASE DESCRIPTION

The database resides on the www.anderson-island.org web site on godaddy.com. The contents of the database is:

Table: AIHSMEMBER or AICCMEMBER

NAME	TYPE	DESCRIPTION
id	Number	Unique member id for each member.
firstname	Text	First name and name of 2 nd member
lastname	text	Last name of member
address	text	
city	text	
state	text	
zip	text	
email	text	
Phone1	Number, 10 digits	
Phone2	Number, 10 digits	
Notes	Text	Freeform text.
year	text	Year user is paid through, or 'life'
payment	Number	\$Amount of membership payment
paymentmethod	Text	Check or creditcard
paymentdate	date	Date of payment
gardenyear	text	Year garden is paid through
gardenpayment	Number	\$Amount of garden payment
gardenplots	number	Number of plots, usually 0 or 1
gardenpaymentdate	date	Date of payment
contribution	Number	\$Amount of contribution payment
contributiondate	date	Date of contribution
Membersince	Date	Date user became a member, if known
Updated	Date/time	When this record was last updated
Membertype	Text	Family or Single membership
Dontshowaddress	Bool	True to not display the member's address