

Training Agenda for SC PTA Convention

Introduction

1. memberplanet Powerpoint Slides
 - a. Description about memberplanet and our features

In wanting to keep everything simple for units, we are just focusing on membership dues collection. There are a whole host of additional features like events and text messaging that you can utilize at a future date within the platform.

Transition to live platform

Membership Feature

Online Steps

2. How to set up a membership level
3. How to set up custom fields such as student name, grade, teacher
4. How to set up additional payment option such as a donation
5. Assigning membership card
6. Customizing email invitations to send to members

Offline Steps

1. Adding members to memberplanet group
2. Setting up the membership level
3. Assigning members a membership level
4. Assigning the membership card
5. Customizing and sending email invitations to access membership card

Reporting

1. Member levels report- to view paid members

2. Additional Payments report- to view where donations

Membership Cards

1. How admins can print cards
2. How members can print their own card
3. How members can access card through the app
4. Pricing for membership dues collected: 3% plus .30 cents
 - a. memberplanet donates the site fee for dues collected through the membership module

Pricing and Support Options

1. Review Success Site: <http://scpta.memberplanet.com>
 - a. Steps on how to get started, membership card, additional features, best practices.
2. Support Options
 - a. Phone
 - b. Email
 - c. Chat
 - d. Success Site
3. Pricing
 - a. All units are defaulted to our Essentials plan for free.
 - b. Units can continue to stay on the free plan or choose to upgrade if they wish.
 - c. You can look in memberplanet within the subscription tab to view the different plans.