FREQUENTY ASKED QUESTIONS (FAQ)
Please use Google Chrome Browser with MemberHub

LOGIN INFORMATION

Q. Where do I go to login to MemberHub?

A. Visit: https://app.memberhub.com/login Enter your email address and choose the 2nd option, "I need to create a password" then click "Next" and follow the instructions (if you haven't already logged in with a password).

Q. What if the system logs me into the wrong unit?

A. The system will find your email address in any PTA where you were listed as a member or officer in the past. Just click on your name in the upper right corner and scroll down to switch to the correct PTA.

DIRECTORY LISTING

To alleviate privacy concerns, we have set the default for all sites to OFF. If a PTA wishes to use the directory, it's important to understand what information is visible to all PEOPLE on the site (not just PTA members.) **Please note:** site admins will still see the directory but all others will not as long as the Directory remains off in SETTINGS. Also, if people hide their own profile information, they will personally still be able to see it but others will not.

Q. How do we turn the Directory ON after making sure everyone on our site is aware of what will be shared?

A. Go to Admin Console> Settings> Features> and check the Directory box. This will turn on the Directory for all people listed on your People Tab. MH has a paid Upgrade available now to list only PTA members in the directory!

Q. How do I restrict other people on the site from seeing my email address if the Directory is ON?

A. Login and click on your name in the upper right, click "Your Profile," then click on the "Adjust Profile Visibility".

ADD OFFICERS/FORM A – This must be done every year!

Q. Do I have to enter officers if they are continuing in their position?

A. Yes, all officers must be entered each year.

Q. Who can enter new officer information?

A. Any outgoing officer can enter incoming or continuing officers. If a paper form is filled out, your Region Director or the state office can also assist. Paper Form A available here

Q. How do new officers get admin access to the site?

A. As long as the check box that says "Give access to Admin Console and Store Admin" remains checked during the ADD OFFICER process all new officers and the Membership Chairs will be granted access and sent an email.

Q. How do we remove admin access from outgoing officers?

A. Go to the SETTINGS tab and click on "Administrators" in the right-hand navigation and use the X to delete access for outgoing officers. To delete access to the Store Admin, click into the Store Admin button (top right) and choose "User Permissions" to delete or add store admins.

Q. Can membership chairs be added with admin access so they can add members?

A. Yes, they are added with the ADD OFFICER button.

Q. Why do I get an error when trying to add officers stating the email address is already claimed?

A. When adding officers, start typing the first 3 or 4 characters of the person's name and then PAUSE to see the search results. Select the person from the list and continue to fill in the information needed. If you hand enter all the information in the form instead of selecting from the list or your browser auto-fill adds the information, you will get an error message saying email address is already claimed.

Q. How do I turn off the auto-fill so I can see the search results?

A. Please press the ESC key after pausing to allow the search and the browser auto-fill should disappear and you will see the search results that were hidden behind.

Q. In trying to Add Officers, I cannot click on the person's name once the system finds them?

A. Are you using the Internet Explorer browser? IE does not allow you to select so please use Google Chrome.

ENTERING MEMBERS

Q. How will we enter members who use the same email address as another family member?

A. The system only allows one person per email. However, you can enter additional members leaving the email address blank and adding a valid mobile phone number or any 10 digits (ex. 111-111-1111) to bypass this requirement. The unit officer/membership chair can send the eCard links to the family's email address provided or they can print and mail the membership cards if no email was provided.

Will I receive a link to my eCard via email?

A. Yes, your receipt email will include a link to download your Membership eCard. If purchased with a credit card online, all family member eCard links will be available in this one receipt (if purchased together in one transaction.) Please be aware that the person receiving the receipt email will need to forward the email or the eCard link to those other family members or you can print out the card for them.

Q. What if a member loses the link to their card, how can they get it again?

A. The PTA officer can send the link again (available on the right side of MEMBERS listing). The member can also login to MemberHub with their email address at https://app.memberhub.com/login and click to create a password. Once logged in, they will see a link to the card on their dashboard right hand side. This assumes the PTA has not blocked people from logging into their site.

Q. If we use another Online Membership System already, how will we get our member information into MemberHub?

A. The PTA will need to supply a list of member information using the template provided by the state office and they will be imported for you. Please note, no receipts with eCard links are generated from an import. To save this extra step and allow people to receive their eCards, you should consider using the ONLINE STORE in MemberHub.

Q. Can PTAs add additional information fields to membership items in the online store?

A. Yes, however this feature is only available in the Online Store. PLEASE NOTE - the additional information collected does NOT print as part of the Members report. The information is only available in the Store Orders report.

Q. Membership lists – will we be able to export our membership roster to excel?

A. The Members export report includes all fields entered for your members. You can also search for a member name using the search box or sort on any column by clicking the column heading. As a reminder, any Additional Fields added in the online store are only available in the Orders report from the Store Admin.

ONLINE STORE 2.0

Q. Are we required to upgrade to Store 2.0?

A. Yes, Stripe is replacing WePay so we will need all units to upgrade by the middle of December.

Q. Do we have to close out the WePay account?

A. Yes, you will need to eventually close out the WePay account but you can wait a couple months just in case.

Q. Can you have more than one bank account associated with Stripe?

A. No, there can only be one bank account associated with your Stripe account.

Q. When the funds are deposited into our account, how do we know what the money is for specifically?

A. The new Payout Reports available in your Store will detail all the individual deposits for easy reconciliation.

Q. What is the correct legal name we should use in Stripe?

A. PTA New York Congress d/b/a Your PTA Name (as shown in MemberHub)

Q. How do we edit the legal name or other information if we entered it incorrectly?

A. Go to your Store Admin > Settings > Stripe Express Dashboard > Account and you will be able to edit information.

Q. Do we have to order the In-Person Swiper when it becomes available?

A. No this is completely optional.

Q. Should the Treasurer or President set up the Stripe account as the owner?

A. Yes, it should be a signer on the bank account.

Q. Will the money collected by WePay be transferred to Stripe?

A. No WePay will make a final deposit to process everything collected by them before you switched to Stripe.

Q. Will the Stripe owner get notifications when deposits are made to our bank account?

A. Yes, text notifications will be sent to the Stripe owner when deposits are made.

Q. Can we select the timing of the deposits to our bank account?

A. No, Stripe will deposit on a weekly basis

Q. What if I have a Stripe account already?

A. You will need to create a new Stripe account with a different email address.

Q. Is there a QR code available as a direct link to our store?

A. You can create a QR code for any link using a free software online.

Q. Will our old store items roll over to the new store when we upgrade?

A. Yes, all memberships, items, categories will be available in your new store automatically when you upgrade.

Q. Is there a charge for this store upgrade?

A. No, there is no cost for Store 2.0

Q. Can I set up two PTA accounts with Stripe using the same email address?

A. No, you will need a unique email address for each account but you can possibly use the same mobile number.

Q. Are there processing fees using Stripe for purchasing online with a credit card?

A. Yes, the fee structure is the same as WePay. credit card processor charges a fee for their service and MemberHub includes a platform fee. The combined fee is 3.5% +$0.50 per transaction. (For example, a $10 membership would be $10.85 total cost). The PTA has the option to pass the fee to the member (default) or to budget for the expense and absorb the fee at the unit level (requires a change in the Settings menu on the Store Admin Dashboard.)

Q. Is the fee structure the same as in our current store?

A. Yes, the fees are the same as in WePay 3.5% plus .50cents per transaction

Q. Can you choose to pass on or absorb the fees for different products?

A. The setting you choose will apply store-wide.

Q. What legal name do we need to use when setting up Stripe?

A. PTA New York Congress d/b/a PTA Name (as shown in MemberHub)

Q. What information is required for the personal verification of the account owner as part of the Merchant Processing Agreement?

A. New Federal requirements (KYC laws) requires Name, Address, Phone, Email, Birthdate and last 4 of SSN to be able to verify the individual setting up the account is an authorized user on the PTA bank account. You will set up an account with the Credit Card Processor with your own password (separate from MemberHub login). All information is stored by the processor with the highest bank level security.

Q. Where do I find the online store link to promote for my unit?

A. Admins can find the link by clicking "SHOP" at the top of any page while logged in to the Admin Console. Copy and paste that custom URL at the top of the page to promote membership to your families. Be sure to test it first!

PLEASE NOTE: If you have enabled the Site Joins link, this is NOT the link to join your PTA. This only allows the person to join your site as a person not a member.

Q. Can I change the logo that defaults for the Membership items in the store?

A. Yes, click on the Store Admin tab, click Membership (on left), click on EDIT on the item you want to add an image, scroll down to ADD MORE IMAGES. Upload your image and scroll down to UPDATE MEMBERSHIP.

Q. Why is my store not showing any items?

A. Please look at the details of your items (click on Edit) and see if the HIDE in STORE? Box is filled in Gray – this means the item will be hidden from the store. Also check the "Available on" and "Expire on "dates and clear them if necessary.

Q. Will we be able to bundle our membership types to create a membership bundle?

A. Yes, you have the option in your online store only to create a custom bundle. Please note that all membership fees must reflect what is in your current approved bylaws.

Q. Can a membership bundle include a donation as well?

A. Yes, you can create different levels of Membership (ex. Diamond, Gold) that include a donation. Again, please price these options to include the membership dues set for the membership types in your bylaws and then add the donation amount.

Q. If the PTA changes their bylaws and updates the dues amounts, how do they change the dues in MemberHub?

A. They will edit those amounts in the Membership items on the Store Admin once Bylaws are approved by the State. These new amounts will also be reflected during cash/check member data entry and on the export report for new members entered manually as well.

Q. How do I transfer the owner on our Stripe account when the account owner is no longer with the PTA?

A. Please follow the new process explained in the help article here: https://support.memberhub.com/hc/en-us/articles/360048580834-How-to-transfer-your-Stripe-Account-to-a-New-Officer-for-the-Store-2-0

STATE DUES PAYMENTS ($4 per member)

Q. How do we pay state dues this year?

A. You will process the payment with an echeck using the State Dues page in MemberHub. PLEASE NOTE: Dues are NOT automatically sent to the State for online credit card members.

Q. When do state dues need to be paid?

A. Once a month if balances are showing as due on your State Dues page in MemberHub.

Q. Which officer positions are allowed to initiate the echeck for state dues?

A. The system allows only the CURRENT year President or Treasurer access to initiate the payment of state dues. To process go to the State Payments link on the right side on the PTA tab. This page will keep track of how many members the unit owes due for at any point in time. If you need to set up your first echeck payment, please read this help article https://support.memberhub.com/hc/en-us/articles/360011869713-Comprehensive-State-Payments-Guide

 Q. Can we still pay NYS PTA state/national dues with a check?

A.   No, the echeck state dues payment feature is an integral part of our membership system, simplifying what the PTA needs to do to process state dues payments. The online transactions are encrypted and secure. If your PTA has questions regarding this, please contact your Region Director.

Q. Is there a fee for PTAs to process the echeck state dues on a monthly basis?

A. Yes, the fee is $1 per transaction (once a month if members were entered). This nominal fee will replace the cost of postage, envelopes and checks.