

Correct way to use Officer Generic Email Address

We have GOOD NEWS regarding using PTA generic email addresses for your Officers in MemberHub.

If your unit uses PTA generic email addresses that you like to pass on to new officers each year, there is now a way to use them in the MemberHub Officer record AND allow us to maintain the historical record of the Officer names that we need to keep!

In order to make this work correctly, you will need to follow the steps below.

BEFORE the NEW officer is added, an existing admin will need to change the information associated with that generic email address in the Profile by following these instructions:

1. Navigate to CONTACTS (left side menu)
2. Click on MANAGE CONTACTS button
3. SEARCH for the generic email address. If it does not exist yet in your Contacts then skip to #8 below
4. If found, CLICK the 3 dots (on the right) and select "View Profile"
5. Click EDIT and change ALL the fields to match your new officer's name and contact information. DO NOT USE "PTA President" as the name, etc...
6. CLICK "Suggest Changes" and an email will be sent by MemberHub to the generic email address
7. Someone who has access to the generic email address will need to use the link in the email to "ACCEPT THE CHANGES"
8. Once accepted - Navigate to COMPLIANCE (left side menu)
9. Click on OFFICERS button
10. Select SCHOOL YEAR from the drop down
11. Click on ADD OFFICER
12. Select the TITLE and then enter the generic email address
13. If you found it while searching contacts earlier, the name will pop up to select and all the information from the Contact record will populate. If not, you will continue to enter all the information yourself
14. Be sure to SLIDE the radio dial ON to "Add as Organization Admin"
15. Click SAVE

This method will allow us to see the correct name of the person associated with the generic officer email addresses each year while they are in office. Later when the name is changed in the Profile record, it will NOT affect the historical Officer records for your PTA.