

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.
4. If it does not exist, add a new CONTACT record using the generic email address and skip to STEP 6 a-d
5. If found, CLICK the 3 dots (on the right) and select "View Profile"
6. Click EDIT and change the fields to the following:
 - a. Display Name – MUST LEAVE BLANK
 - b. First Name – keep generic, ie."President, Treasurer, etc.."
 - c. Last Name – keep generic, ie. "PTA Name"
 - d. Remove address and phone number
7. If making changes to an existing profile, CLICK "Suggest Changes" and an email will be sent by MemberHub to the generic email address and someone will need to login and "Accept the Changes"
8. If creating a new Contact, click SAVE
9. Navigate to COMPLIANCE (left side menu)
10. Click on OFFICERS button
11. Select SCHOOL YEAR from the drop down
12. Click on ADD OFFICER
13. Select the TITLE and then enter the generic email address and fill in all the fields with the current officers' information including a valid home address and phone number for specific officer roles.
14. Click SAVE

This method will allow us to see the correct name of the person associated with the generic officer email addresses each year and for historical reference. However, the Contact profile will remain generic.