

# Mountaineering Scotland Members Portal

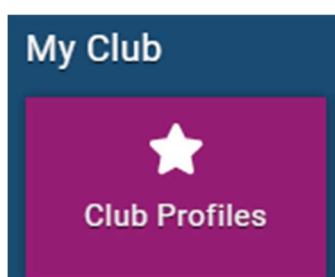
## Quick reference guide for Club Officials

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2. [View and update Club details](#)
3. [View and update members of your Club](#)
4. [Add a new member](#) \*New: link existing members
5. [Renew members of your Club](#)
6. [Remove a member who is no longer in your Club](#)
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### 1. Introduction

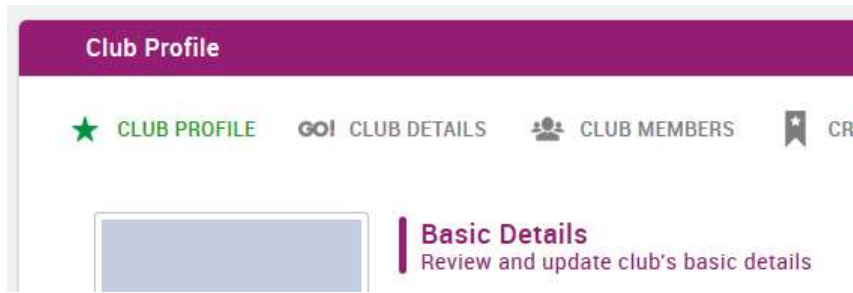
The purpose of this document is to provide Club Officials with a guide to managing their club's Mountaineering Scotland membership on the Members Portal. As a Club Official you have access to details of your Club and of Members of your Club. Any questions, please get in touch on 01738 493 943 or [membership@mountaineering.scot](mailto:membership@mountaineering.scot)

Access your club information by clicking the Club Profiles tile



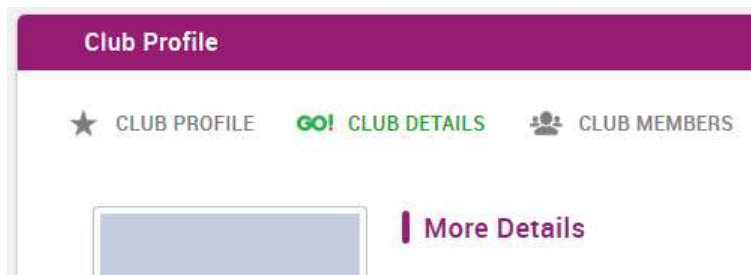
You might need to click Menu (at the top left) then scroll down to view this tile.

## 2. View and update Club details



- Click **CLUB PROFILE** to view Basic Details (this does NOT update our website Club Finder so please tell us any updates for the website by email).

- Click  **Update Details** to edit.
- Click **Club Details** then **More Details** to indicate your club activities



### 3. View and update members of your Club

To view and update members of your Club click **CLUB MEMBERS**



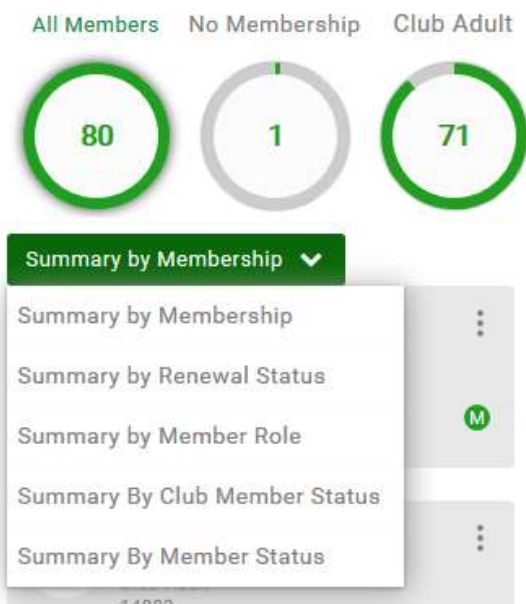
You can change from grid to list view



You can view all members, members with no membership or view by membership type by clicking the circles above the list:



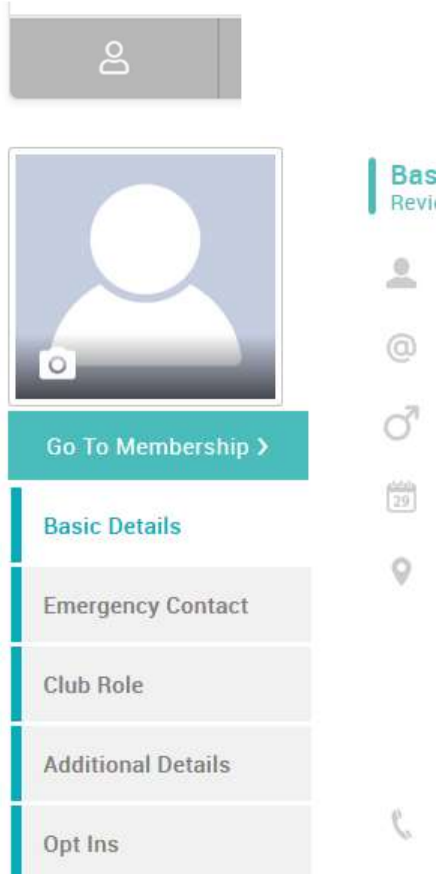
Other summary views are available:



You can also Search for a particular member

 [Search](#)


- Click on the person symbol to view and edit the member's details.



The image shows a user profile card for a member named Bas Revi. At the top left is a grey button with a person icon. Below it is a square profile picture placeholder with a camera icon in the bottom left corner. To the right of the profile picture is the name 'Bas Revi' in teal text. Below the name is a vertical list of icons: a person icon, an '@' symbol, a male gender symbol, a calendar icon showing '29', a location pin, and a telephone handset. Below the profile picture is a teal button labeled 'Go To Membership >'. Below that is a vertical list of menu items: 'Basic Details' (highlighted in teal), 'Emergency Contact', 'Club Role', 'Additional Details', and 'Opt Ins'.

- Click **Update Details** [Update Details](#) to edit the **Basic Details**.
- For newsletter and magazine choices click Opt-ins

Back To Members




Go To Membership >

- Basic Details
- Emergency Contact
- Club Role
- Additional Details
- Optin**
- Credentials

Opt-in  
Below a

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- To download a list of members go to the Club Reports tile

My Club

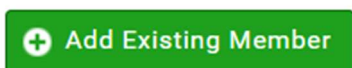
- ★  
Club Profiles
- 📊  
Club Reports

The recommended report is in Members/Club Members

## 4 Add a new member

### Add an Existing Member

This allows you to link someone already in the database to the club. This could be a lapsed member, a member of another club, an individual member, or someone who has registered their details on the Mountaineering Scotland Members Portal

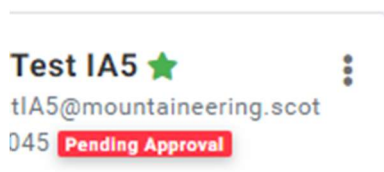


You are asked to enter two pieces of information about the member from:

- Email address
- Membership number
- Date of Birth

Then an email is sent to the member. Please ask the member to follow the instructions in the email.

Then approve their link to your club by clicking the three dots and selecting **Approve**



**OR**

Email [membership@mountaineering.scot](mailto:membership@mountaineering.scot) with their name, member number or email.

### Note on members with individual membership or links to other clubs.

If your new club member is currently or has been an individual member of Mountaineering Scotland we want to link their existing database record to your club as above.

Please let us know if they wish to retain their full individual membership or just be affiliated via your club. If they are a member of multiple clubs, they may want to decide which one will be their “primary club” through which they pay their Mountaineering Scotland affiliation fee to avoid duplication of costs.

## Add a brand new member

- Click Club Members
- Click Add Member
- Complete the Member's **Basic Details**  
If you do not have an email address for the member use noemail@mountaineering.scot.  
If you do not have a member's date of birth use 01/01/1900
- Complete the **Optins** to indicate the member's magazine and newsletter choices.
- Your new members may have been added straight to the Cart. If not then choose their membership category as follows:

 CLUB MEMBERS





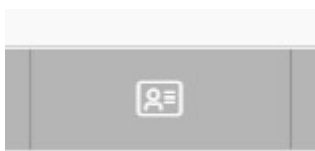
Example: have added 4 new members.

Select the 4 new members by clicking the no membership circle.



Give them a membership by:

Click on the membership symbol below the member record



Click **Buy/Review memberships**

Membership details

Membership Name

No r

Buy/Review Memberships

### Buy a Membership

Choose from the list of available Membership

£14.25



**Benefits**

- Scottish Mountaineer magazine four times a year & monthly e-newsletter
- Discounts on gear, places to stay & useful services
- Unbeatable value mountain skills...

Read more

Club Adult

Click the membership.

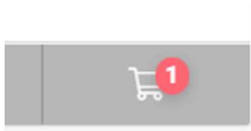
Check the magazine and newsletter choices in **Optins** then **Save and Continue** to the next member or go straight to the **Checkout**.

Save and Continue

Checkout

If you click Save and Continue you see an indication that the membership is in your cart.





Go to the checkout. See Paying below.

### Note on email addresses

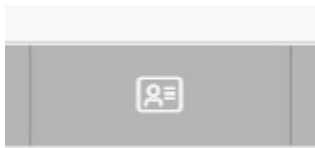
You **can** use the same email address for more than one member. When you add a new member the system copies the email address in to the username field. When you add a another member with an email which has already been used, edit the username to something unique.

## 5. Renew members of your Club

- See Section 3 View and update members of your club
- If is helpful to note if members have already been paid for by another club or have an individual membership. The Primary club status of your members is shown on the Extended report which you can download as above. See the “Is Primary Club column”.

### To renew a single member

Click on the membership symbol below the member record



Click **Buy/Review memberships**

× Membership details

Membership Name

No r

Buy/Review Memberships

## Buy a Membership

Choose from the list of available Membership



£14.25

**Benefits**

- Scottish Mountaineer magazine four times a year & monthly e-newsletter
- Discounts on gear, places to stay & useful services
- Unbeatable value mountain skills...

[Read more](#)

**Club Adult**

Click the membership.

Check the magazine and newsletter choices in **Options** then **Save and Continue** to the next member or go straight to the **Checkout**.

Save and Continue

Checkout

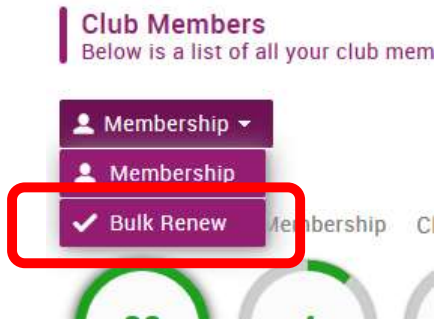
If you click Save and Continue you see an indication that the membership is in your cart.



Go to the checkout. See Paying below.

## To renew several members

- Select **Bulk Renew**



- Tick the members you wish to pay for

Yes	Club Adult <i>Expires: 31/03/2019</i>	<input checked="" type="checkbox"/>
No	Club Adult <i>Expires: 31/03/2019</i>	<input type="checkbox"/>
Yes	Club Adult <i>Expires: 31/03/2019</i>	<input checked="" type="checkbox"/>

Yes/no indicates whether this is the member's primary club so whether the member should be paid by this club.

- then click Renew (near the top of the screen)



- Go to the checkout. See Payment below.

## 6. Remove a member who is no longer in your Club

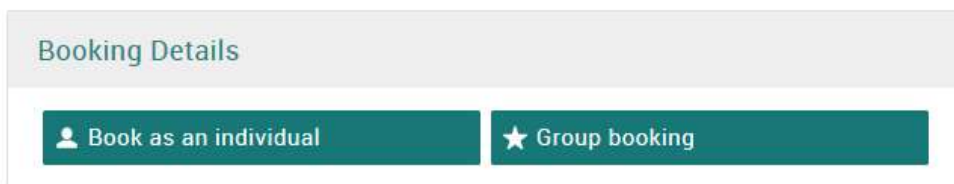
Locate the member record, click on the three dots or menu and select **Remove from Club**.

## 7. Enter an event

- As a club official you can book yourself and members of your club on to events.
- From the top menu, select Events & Courses



- As a club official you can pay for yourself or members of your club.



- Complete the **Booking Form** and select Complete Registration



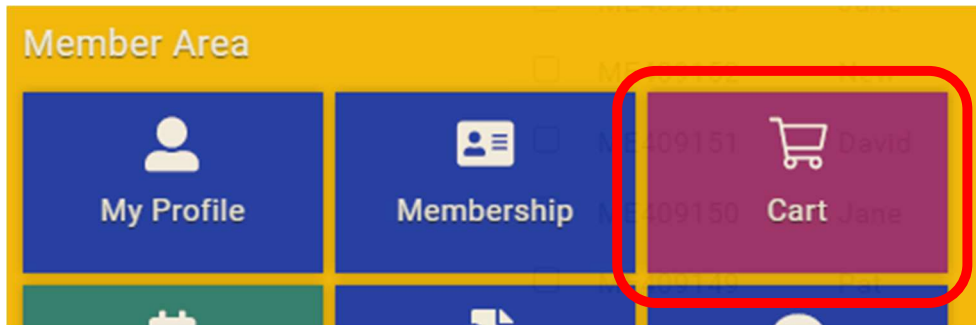
- You can now pay via the **Checkout**

## 8. Payment

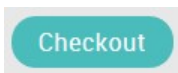
- Go to the checkout:



or



You can now check and edit what is in the Cart. When you are happy with the selection click Checkout.

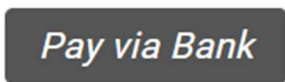


In the Checkout choose either



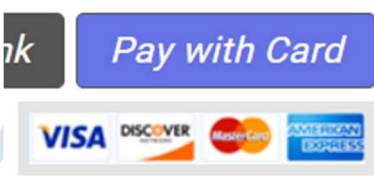
Please complete your Club name in the Invoice information. When sending payment by BACS or cheque please quote the invoice number which is similar to PR12345

Or



This sets up a Direct Debit mandate allowing one-off payments.

Or



## 9. Families



People in our database can be linked in family groups. When people are linked as a family then one member of the family can login and manage the membership and book events for other members of the family for example parents booking their children on to climbing competitions.

You can view family groups within your club.

You can setup family groups for people linked to your club.