

Mountaineering Scotland Members Portal

Quick Reference Guide for Club Officials

1. [Introduction](#)
2. [View and update Club details](#)
3. [View and update members of your Club](#)
4. [Club Committee Members](#)
5. [Add a new member/link existing members](#)
6. [Renew members of your Club](#)
7. [Remove a member who is no longer in your Club](#)
8. [Enter an event](#)
9. [Payment](#)
10. [Families](#)

1. Introduction

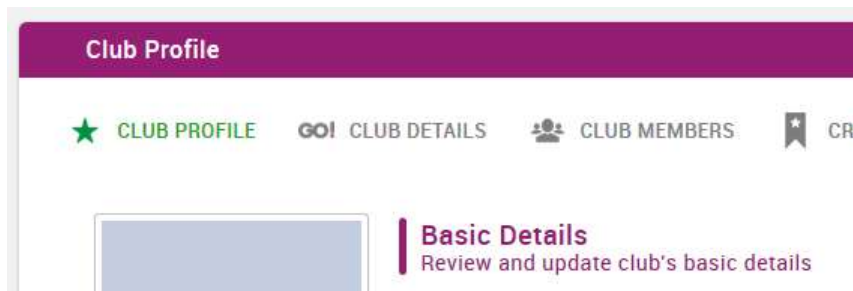
The purpose of this document is to provide Club Officials with a guide to managing their club's Mountaineering Scotland membership on the Members Portal. As a Club Official you have access to details of your Club and of Members of your Club. Any questions, please get in touch on 01738 493 943 or membership@mountaineering.scot

Access your club information by clicking the Club Profiles tile



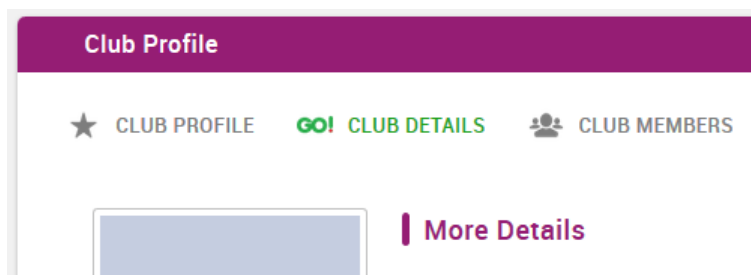
You might need to click Menu (at the top left) then scroll down to view this tile.

2. View and update Club details



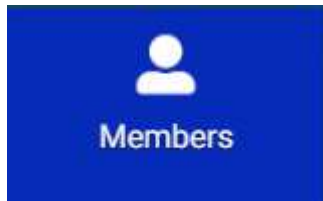
- Click **CLUB PROFILE** to view Basic Details (this does NOT update our website Club Finder so please tell us any updates for the website by email).

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

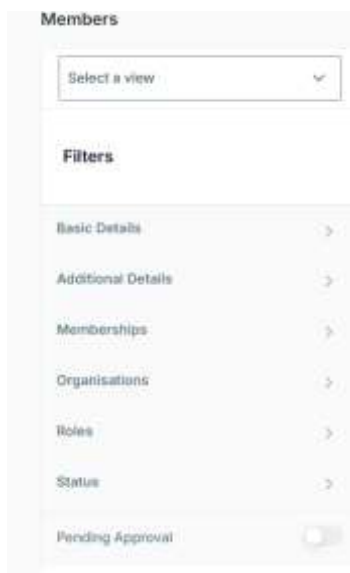


3. View and update members of your Club

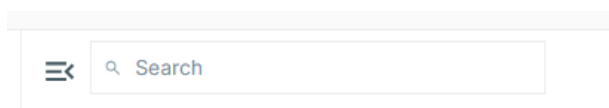
To **view and update members** of your Club click the **MEMBERS** tile in the **My Club** section of the **main menu** to view the **MEMBERS GRID**



Here you'll see a list of everyone associated with the club. You can use the menu on the left hand side to filter for different types of membership, club roles and membership status, and save specific filters which you will use regularly.



The search box at the top of the members grid lets you search by name, email address or membership number:



To view an individual member profile, click on their name and the following will appear:



Update Details

- Click **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

Mou

Mounta

www.m

share it

commu

purpos

Membe

Please ne

news)

☒ I wo

☒ I wo

☐ I wo

☐ I wo

☐ I wo

☐ I wo

by e

Just

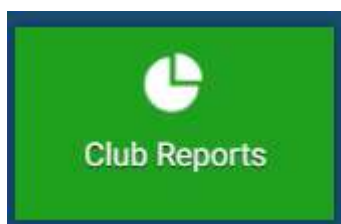
Let us k

JustGo

Download a list of all members

To download a full list of members go to the **Club Reports** tile. The recommended report is in **Members/Club Members**

To download the report as an excel file, click on the button that says 'Export CSV'. You can also download a pdf by clicking the arrow which reveals 'Export PDF'



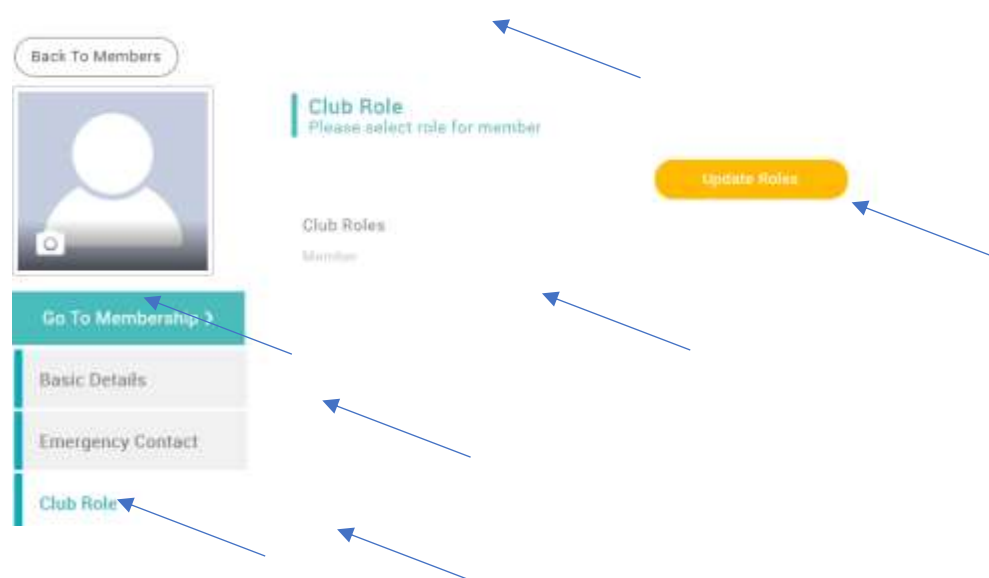
You can also download reports directly from the Member Grid using the 'Export' button top right.

4. Assigning Committee Members

To ensure the right people within your club have access to the Club Profile to renew and add new members and also keep up to date with communications from us, you must ensure that your club committees are updated.

Find the member in the Member Grid and click on their name to bring up their profile.

Select '**club role**' on the profile and update role. Tick the specific role or untick to remove.



Note: only the list of roles below will allow access to your Student Club members on the club profile:

- Chair
- Secretary
- Membership Secretary
- Treasurer

5. Add a new member

Add an existing Mountaineering Scotland 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

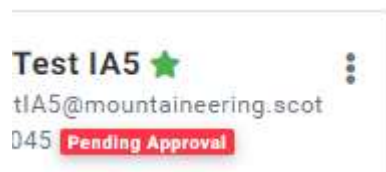


You are asked to enter two pieces of information about the member from:

- Email address
- Membership number
- Date of Birth

An email is sent to the member for them to confirm they wish to be added to the club. 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 with their name, member number or email for us to link them to the club.

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

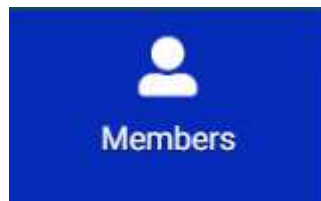
If your new club member is currently or has been an individual member of Mountaineering Scotland we want to link their existing database profile to your club as above.

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

To add new members individually

Go to the members grid



- 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 **Opt-ins** to indicate the member's magazine and newsletter choices.
- Choose the Club membership and add to cart.

Adding multiple new members

The quickest way to add multiple new members, ie those that have NEVER had a Mountaineering Scotland membership before, is to bulk import them.

In the members grid, click 'Add new member' > Import member

This will allow you to download a template spreadsheet which you can add their details to, and then upload it. Alternatively, please complete the spreadsheet and send it securely to us at info@mountaineering.scot and we will do the import.

It is REALLY important that there are no members on the sheet that are already on our database, as it will cause the import to fail. Please ask if you are unsure!

When the import is complete, you can filter for members with status 'Action required' and go through to add their membership as follows:

Click on their name to bring up their profile

Click the green/blue 'Go to membership button'

Click the membership.



Your communications preferences

Please let us know which communications you would like to receive from us. Please note, not all options are available to every membership category (see info for more details).

- ☒ I would like Mountaineering Scotland members news by email: ⓘ
- ☒ I would like Scottish Mountaineer Magazine (digital version) by email: ⓘ
- ☐ I would like Scottish Mountaineer Magazine (printed version) by post: ⓘ

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



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



You can add other memberships to your cart to pay them all together. See **Payments** below.

Note on email addresses

You can use the same email address for more than one member (but not as their username). When you add a new member then the system copies the email address into the username field. When you add another member with an email which has already been used, edit the username to something unique.

Note on pro rata membership fees

New members of your club should be registered and paid for within a month of them joining the club. If they have never had a club membership before or have previously been a member of another club but not in the last club year, they receive a pro-rata reduction on the full year's

membership price depending on the month they join. Members who have had a club membership (whether with yours or another club) in the last club year will pay full price.

5. Renew members of your Club

- See Section 3 View and update members of your club
- It 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 their name in the member grid.

Select ‘Go to membership’ and continue as above.

To renew multiple members (bulk renew)

- In the members grid, click the cog wheel in the top right corner and select **Bulk Renew**



- Tick the members you wish to pay for. ****Yes/no in the Primary Club column** indicates whether this is the member’s primary club so whether the member should be paid by your club. **** If this says no, you should not add or pay for a membership for them.**

Primary Club	Membership	Renewal
☒	University Expires: 31/08/2022	☒
☐	University Expires: 31/08/2022	☐
☐	University Expires: 31/08/2022	☒

- When you have ticked all the relevant members, 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

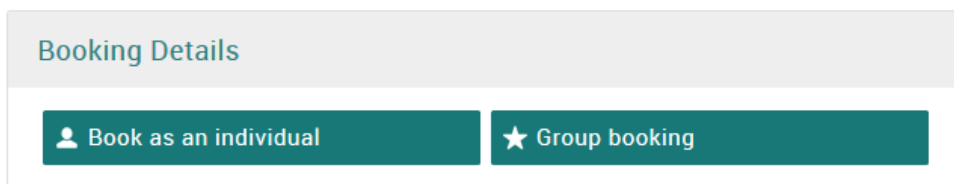
Locate the member record, click on the three dots or menu and select **Remove from Club**.

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



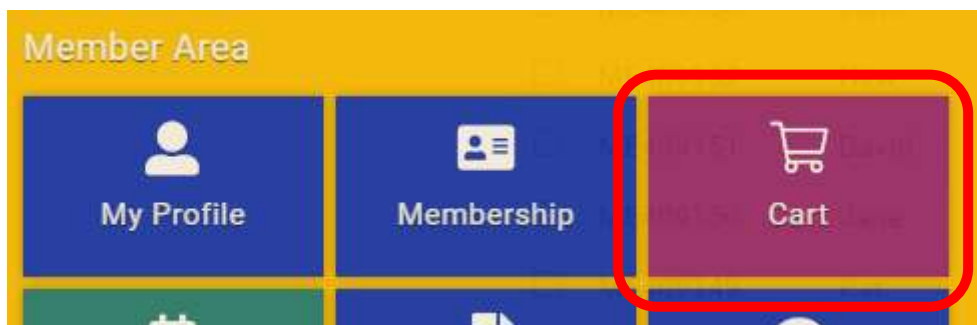
- You can now pay via the **Checkout**

8. Payment

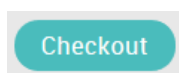
- Go to the checkout:



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

Request Invoice

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

Pay via Bank

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.