



## Mountaineering Scotland Members Portal Quick Reference Guide for Student Club Officials

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4. Student Club Committee Members
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### 1. Introduction

The purpose of this document is to provide Student Club Officials with a guide to managing their Student Club's Mountaineering Scotland membership on the Members Portal JustGo. As a **Club Secretary, Membership Secretary, Treasurer or Chair**, you have access to details of your Student Club and of members of your Club if you have been assigned this role in your profile on JustGo.

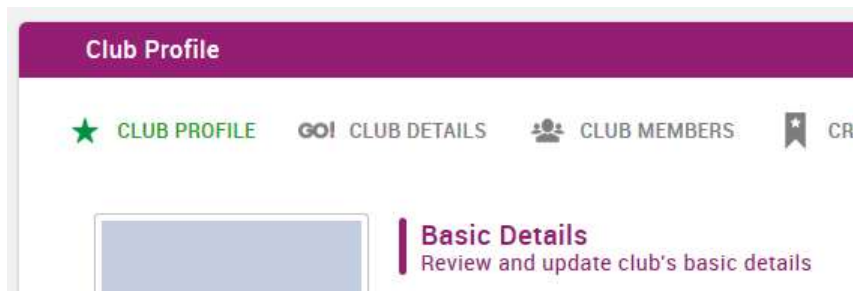
All the information you need should be included in this guide but if you have any questions, please get in touch on 01738 493 943 or [membership@mountaineering.scot](mailto:membership@mountaineering.scot)

Access your Student Club information by clicking the Club Profiles tile

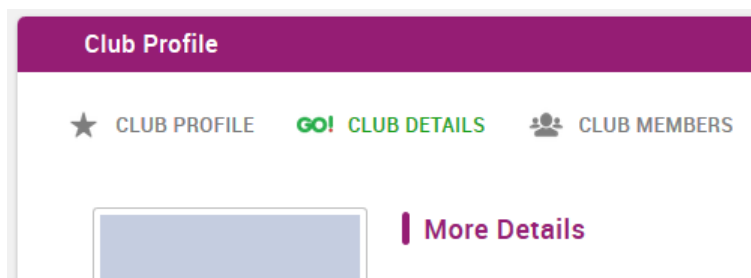


You might need to click Menu (at the top left), then scroll down to view this tile.

## 2. View and update Club details

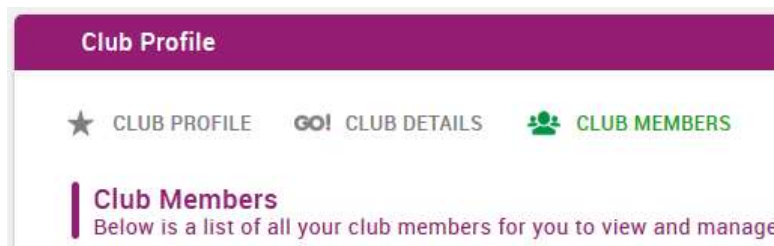


- Click **CLUB PROFILE** to view Basic Details (this does NOT update our website Club Finder so please tell us any updates for the website by email).
- Click **Update Details** to edit.
- Click **Club Details** then **More Details** to indicate your club activities



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

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



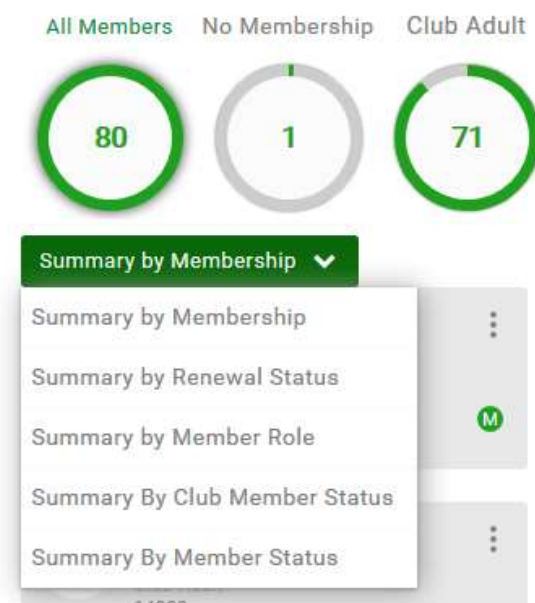
You can change from grid to list view



You can view all members with or without membership or view by membership type by clicking the circles above the list:




Other summary views are available:




You can also search for a specific member using the search box:

 [Search](#)

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





Go To Membership >

Basic Details







Emergency Contact

Club Role

Additional Details

Opt Ins

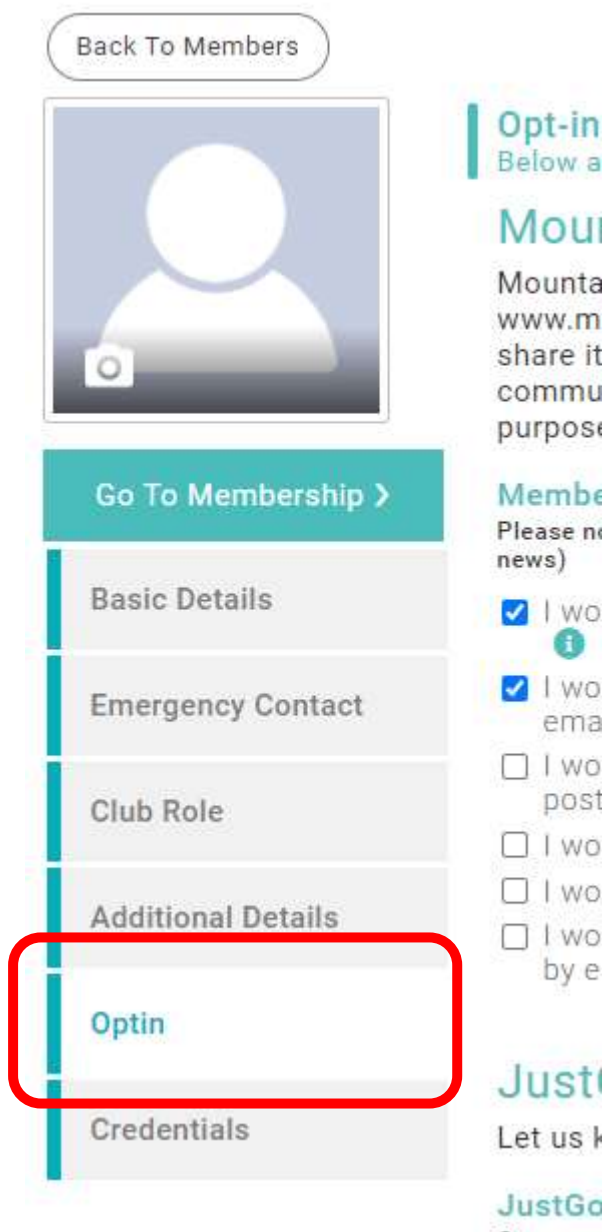
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Revi



- Click **Update Details** to edit the **Basic Details**.

[Update Details](#)

- For newsletter and magazine choices click **Opt-ins**



## 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**

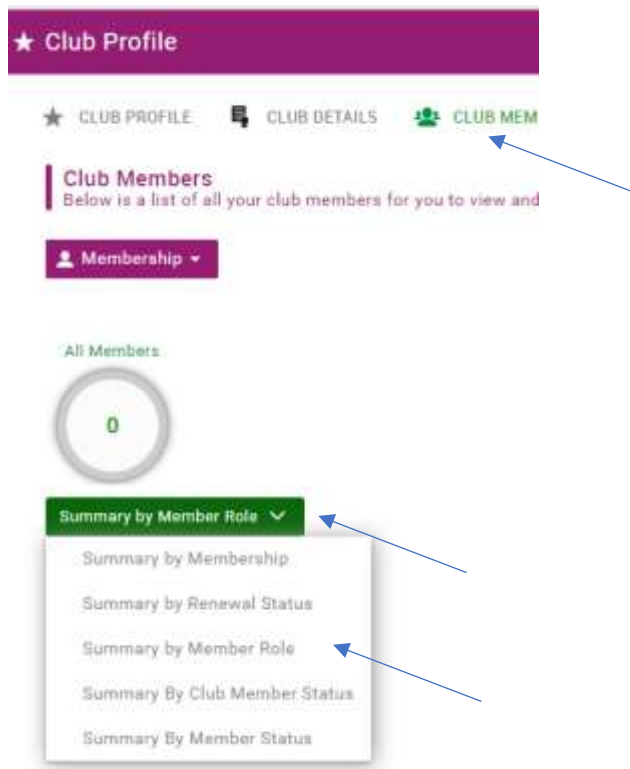
**To download the report as an excel file, click on the button that says 'Export CSV'.** You can also download a pdf by clicking the arrow which reveals 'Export PDF'



## 4. Assigning Committee Members

To ensure the right people within your Student 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 Student Club committees are updated.

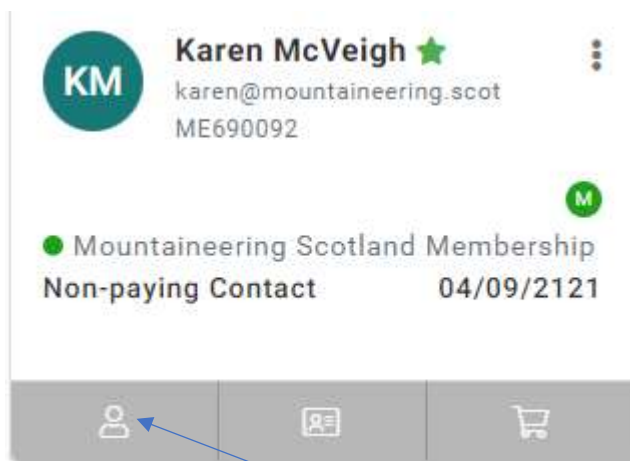
You can view your current Student Club committee members under 'Club members' 'Summary by member role' as shown below.



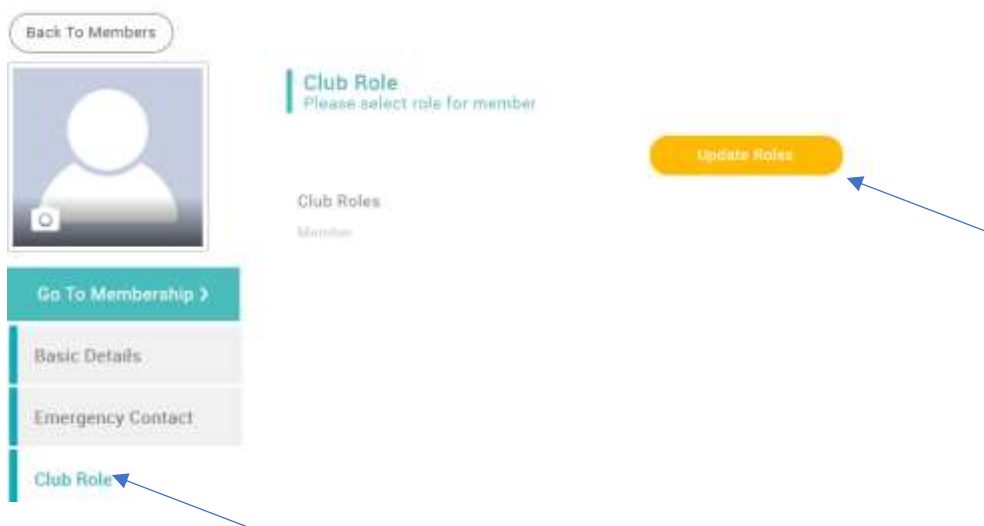
You can click on the circle of each role and find out which members have this role on their profile.



To update these roles, click on the role then select the member's profile



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



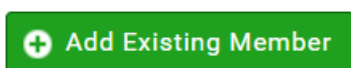
**Note:** only the list of roles below will allow access to your Student Club members on the club profile:

- Chair
- Secretary
- Membership Secretary
- Treasurer

## 5. Add a new member

### Add an existing Mountaineering Scotland member

This allows you to link someone with an existing profile on the database to your 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 themselves but never had membership.



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 to confirm they wish to be added to the club. Please ask the member to follow the instructions in the email.

You can 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 a current or past individual member of Mountaineering Scotland we want to link their existing profile to your Student Club as above.

Please let us know if they wish to retain their full individual membership or change to club membership. If they are a member of multiple clubs, they must 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 **Opt-ins** 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

 Add New Member



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 n

Buy/Review Memberships

Back To Members

Categories > Club Member > University

£17.55

University

**Benefits**

- £15m combined liability insurance for your mountaineering activities
- Monthly e-newsletter and four digital editions of Scottish Mountaineer magazine every year
- Great value mountain skills courses & expert advice
- Money saving offers and discounts from a range...

Read more

✓

SELECTED

#### 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: ⓘ

Click the membership.

Check the magazine and newsletter choices in **Opt-ins** 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.



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

### Note on email addresses

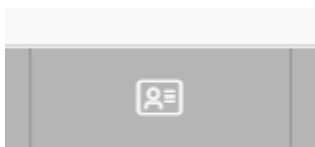
You can use the same email address for more than one member (but not as their username). When you add a new member then the system copies the email address into the username field. When you add another member with an email which has already been used, edit the username to something unique.

## 6. Renew members of your Student Club/link existing members

- See Section 3: View and update members of your Student 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** (ie if they are members of multiple clubs) 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 n

Buy/Review Memberships

[Back To Members](#)

Categories > Club Member > **University**

£17.55

## University

### Benefits

- £15m combined liability insurance for your mountaineering activities
- Monthly e-newsletter and four digital editions of Scottish Mountaineer magazine every year
- Great value mountain skills courses & expert advice
- Money saving offers and discounts from a range...

[Read more](#)

 **SELECTED**

### 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: 

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

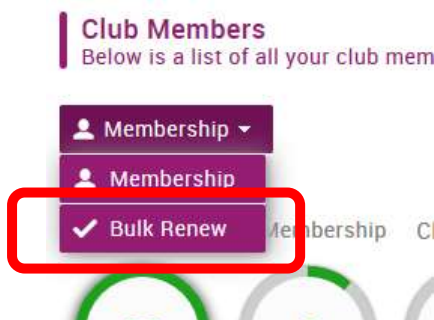
If you click Save and Continue you see an indication that the membership is in your cart.



Go to the checkout. See **Payments** below.

## To renew multiple members

- 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
Yes	University Expires: 31/08/2022	<input checked="" type="checkbox"/>
Yes	University Expires: 31/08/2022	<input type="checkbox"/>
Yes	University Expires: 31/08/2022	<input checked="" type="checkbox"/>

- When you have ticked all the relevant members, click Renew (near the top of the screen)



- Go to the checkout. See **Payment** below.

## 7. Remove members who are no longer in your Student Club

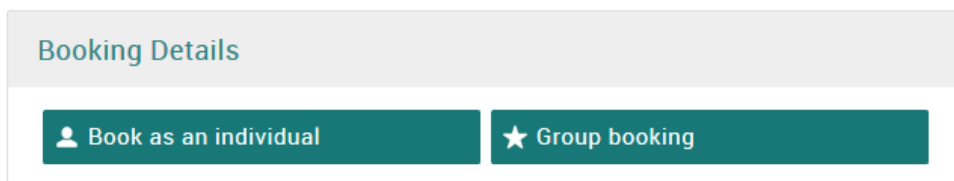
Please do this on a regular basis. Locate the member record, click on the three dots or menu and select **Remove from Club**.

## 8. Enter an event

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



As a Student Club official you can pay for yourself or members of your Student Club.



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



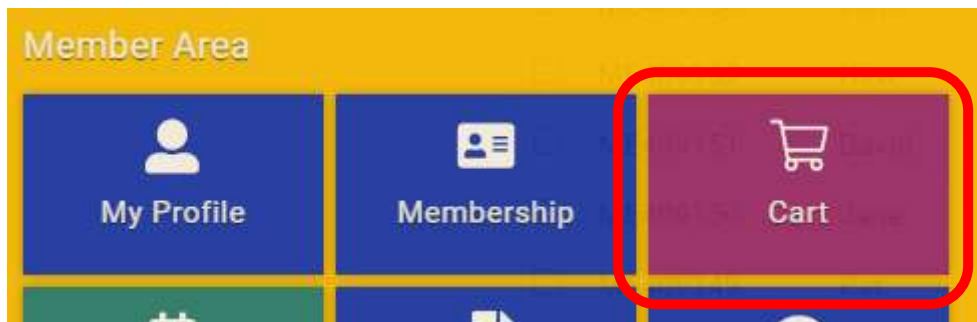
- You can now pay via the **Checkout**

## 9. Payments

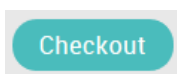
Go to the checkout by clicking the **basket** (top right) or the **Cart tile** in the menu



or



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

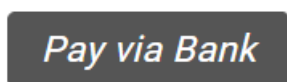


In the Checkout choose either



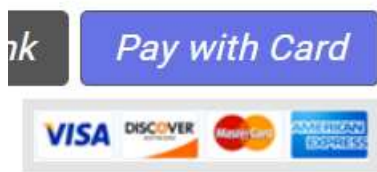
Please complete your Student Club name in the Invoice information. When sending payment by BACS or cheque please quote the invoice number which is similar to PR12345

Or



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

Or



## 10. 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 or a group of students wanting to book onto an event.

You can view family groups within your Student Club.

You can setup family groups for people linked to your Student Club.