

# 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](#)
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7. [Remove a member who is no longer in your Club](#)
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### 1. Introduction

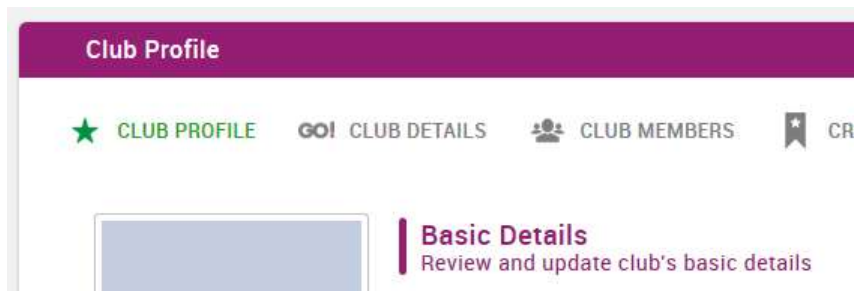
The purpose of this document is to provide Club Officials with a guide to managing their club's Mountaineering Scotland membership on the Members Portal. As a Club Official you have access to details of your Club and of Members of your Club. Any questions, please get in touch on 01738 493 943 or [membership@mountaineering.scot](mailto:membership@mountaineering.s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

Access your club information by clicking the Club Profiles tile



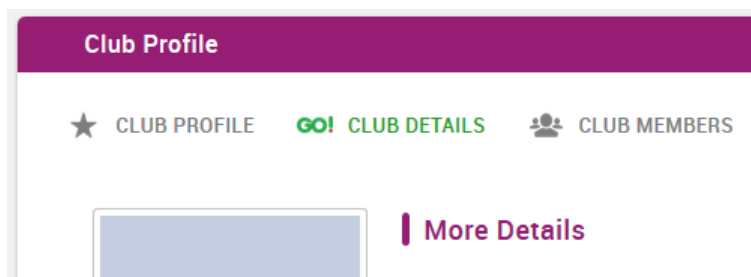
You might need to click Menu (at the top left) then scroll down to view this tile.

## 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**



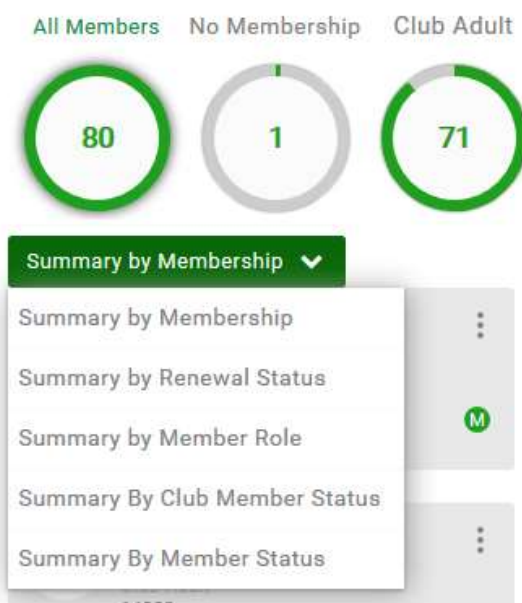
You can change from grid to list view



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.

[Go To Membership >](#)

[Basic Details](#)

[Emergency Contact](#)

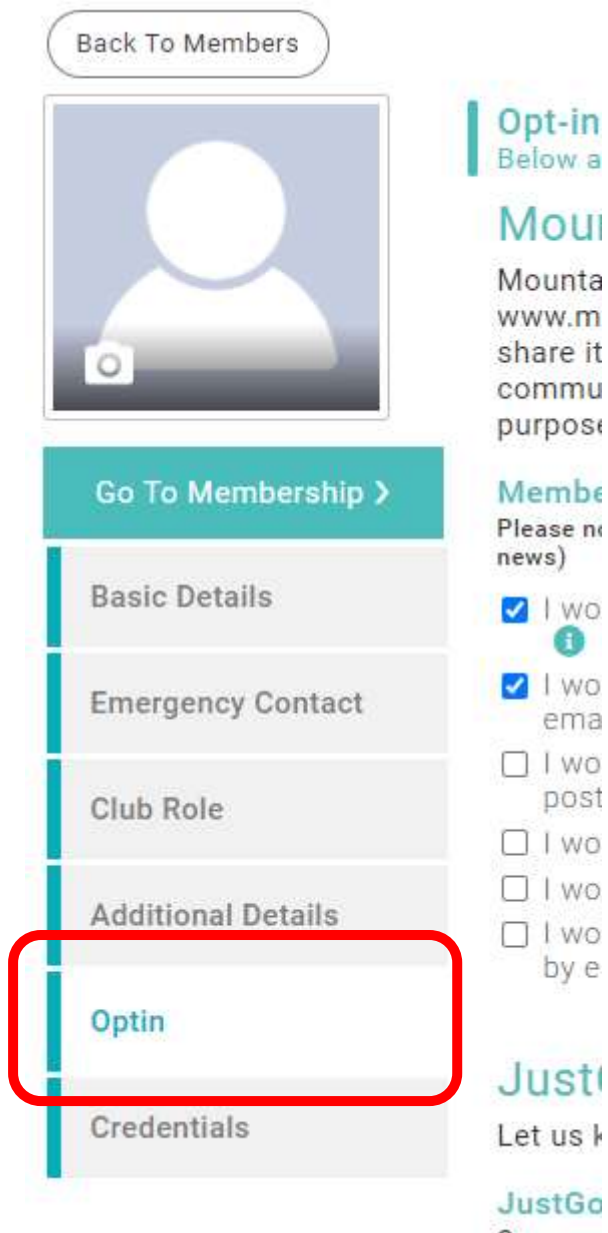
[Club Role](#)

[Additional Details](#)

[Opt Ins](#)

**Bas**  
Revi

- Click **Update Details** to edit the **Basic Details**.
- For newsletter and magazine choices click Opt-ins
- To update a club committee role, click 'Club Role' and assign the relevant role. Note that Chair, Treasurer and Secretary roles have access to all members details.



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



The recommended report is in Members/Club Members

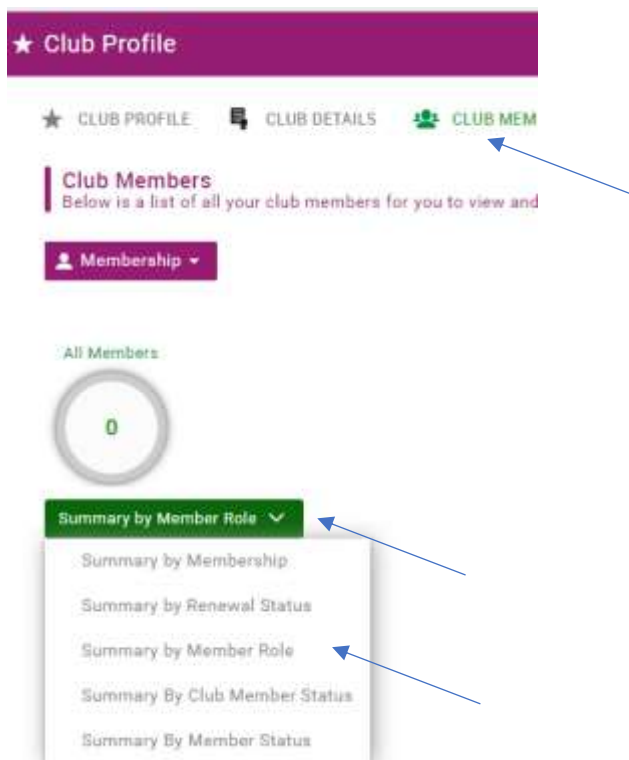
**\*\*NEW\*\*** To download the report as an excel file, click on the button that says 'Export CSV'. You can also download a pdf by clicking the little arrow which reveals 'Export PDF'



## 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.

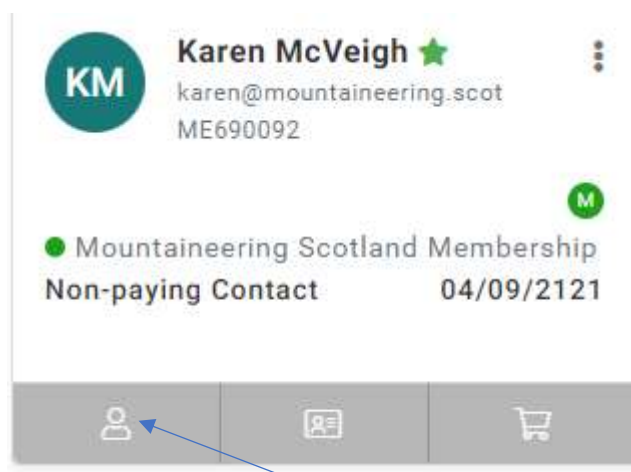
You can view your current club committee members under '**Club members**' '**Summary by member role**' as shown below.



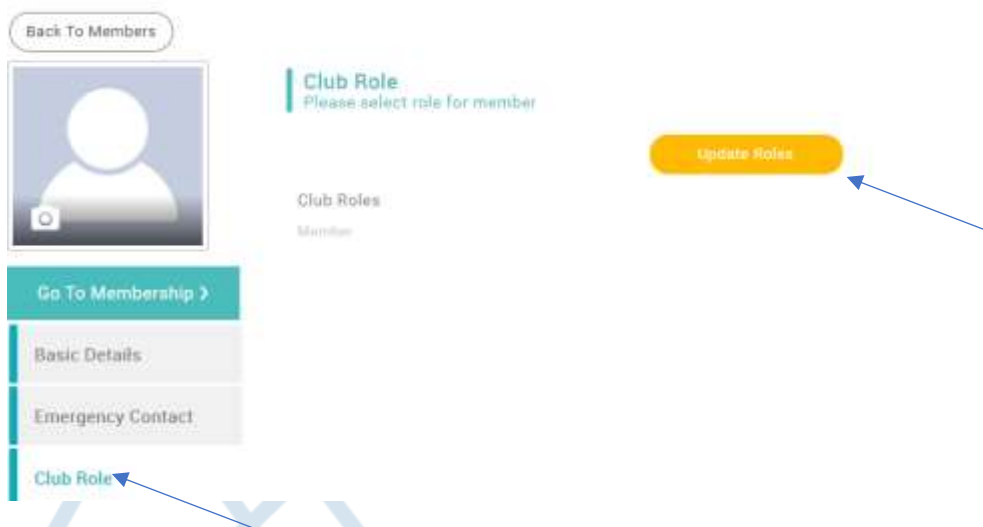
You can then click on the circle of each role and find out which members have this role on their profile.



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 your club members on the club profile;

- Chair

- Secretary
- Membership Secretary
- Treasurer

## 4 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

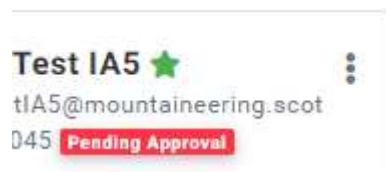


You are asked to enter two pieces of information about the member from:

- Email address
- Membership number
- Date of Birth

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 **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



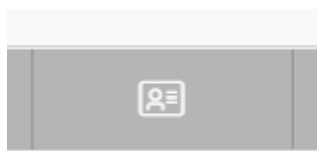
Example: have added 4 new members.

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

### 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 another member with an email which has already been used, edit the username to something unique.

### Note on pro rata membership fees

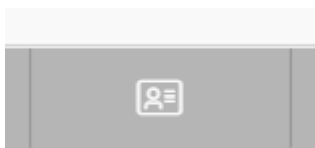
New members of your club should be registered and paid for within a month of them joining the club. They receive a pro-rata reduction on the full year's membership price depending on the month they join. If you have a new member joining your club who holds a lapsed club membership (from another club) or individual membership, the system will recognise them as an existing member and charge the full membership rate. Please contact [membership@mountaineering.scot](mailto:membership@mountaineering.scot) who will process these memberships on your behalf.

## 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 the membership symbol below the member record



Click **Buy/Review memberships**

×

Membership details

Membership Name

No n

Buy/Review Memberships

## Buy a Membership

Choose from the list of available Membership

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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

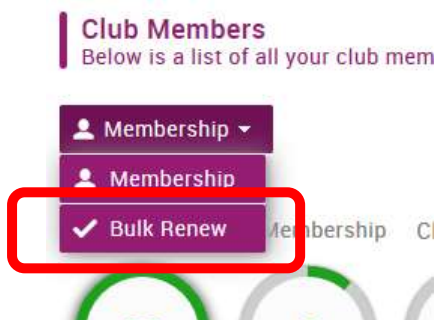
If you click Save and Continue you see an indication that the membership is in your cart.



Go to the checkout. See Paying below.

## To renew several members

- Select **Bulk Renew**

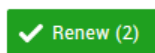


- Tick the members you wish to pay for

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

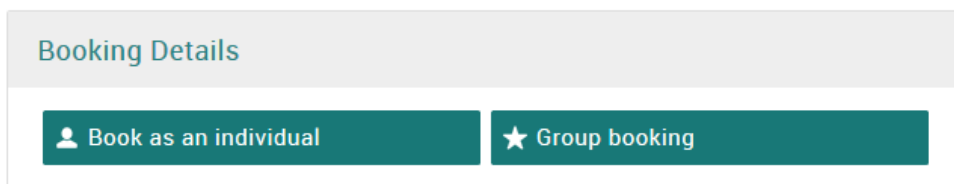
Locate the member record, click on the three dots or menu and select **Remove from Club**.

## 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



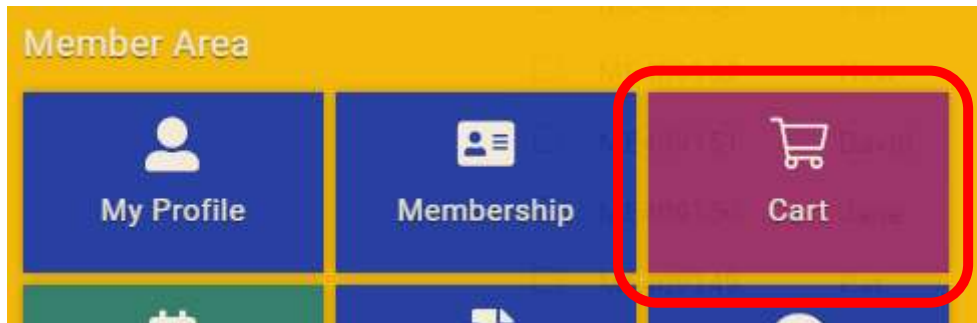
- You can now pay via the **Checkout**

## 8. Payment

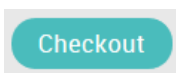
- Go to the checkout:



or



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

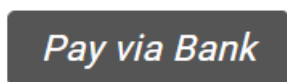


In the Checkout choose either



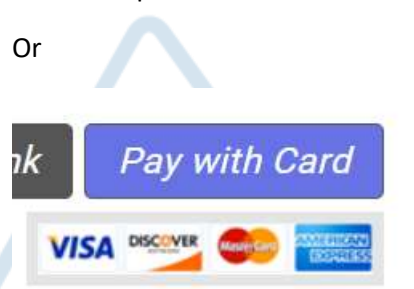
Please complete your Club name in the Invoice information. When sending payment by BACS or cheque please quote the invoice number which is similar to PR12345

Or



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

Or



## 9. Families



### 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.