Mountaineering Scotland Members Portal

Quick reference guide for Club Officials

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 Mountaineering Scotland 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 the club information by clicking the Club Profile tile
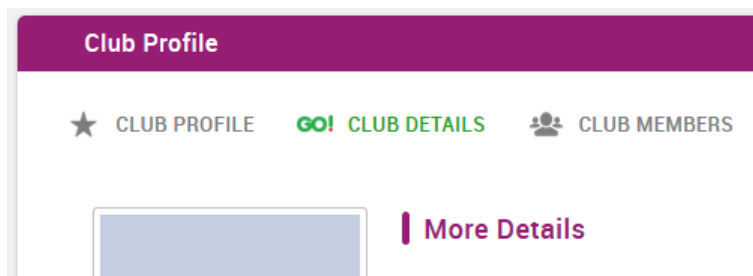
Club Area
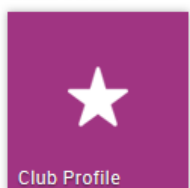
Club Profile
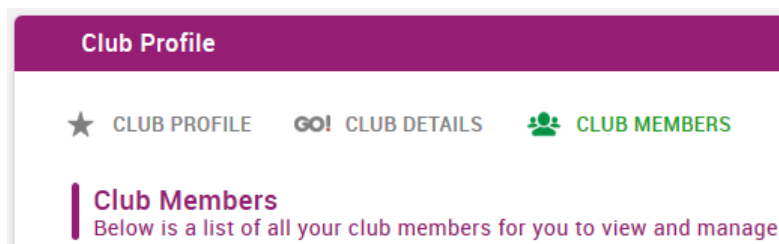
2. View and update Club details
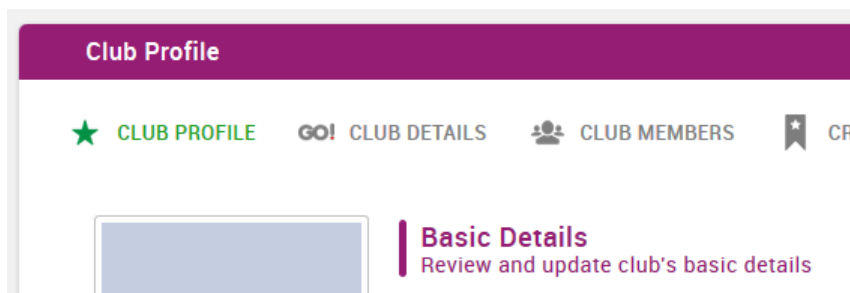
- Click **Club Profile** to view Basic Details

- 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:

All Members   No Membership   Club Adult   Concession   Individual

37   3   29   1   3

You can also Search for a particular member

Search ...   🔍 Search

Click on the member you wish to view or edit

Go To Membership ›

Basic Details

Emergency Contact

Club Role

Additional Details

Opt Ins

Bas
Revi

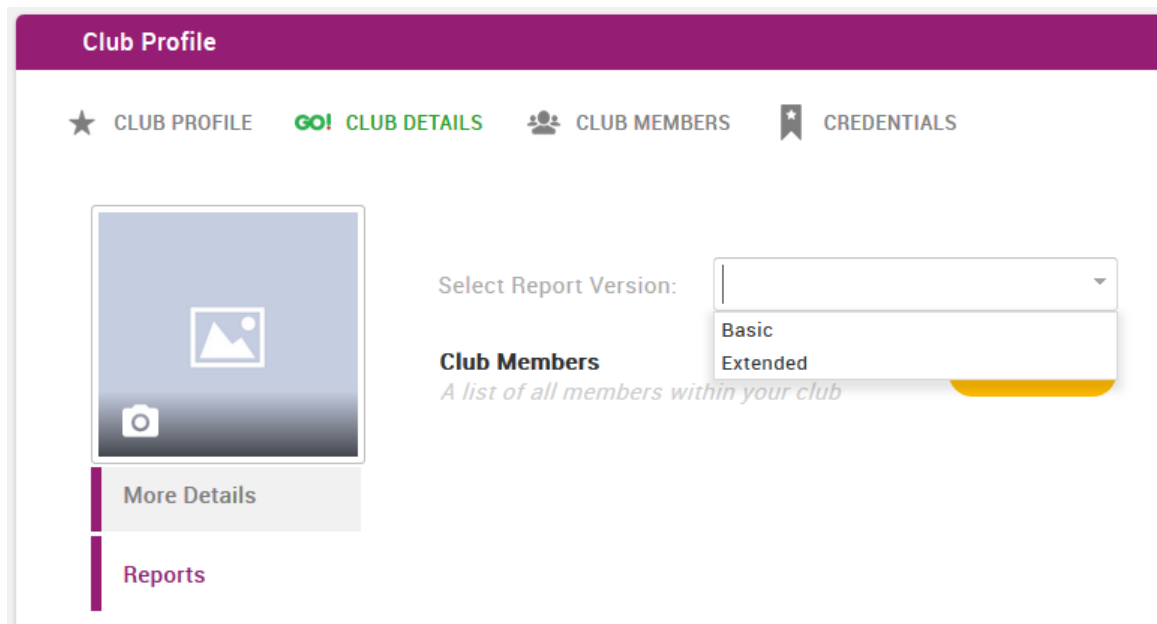Click **Update Details** to edit the **Basic Details**.

Update Details

Chose **Opt Ins** to edit magazine and newsletter choices.

Download a **report** from the Club Details area

4 Add a new member

- If your new club member is currently or has been an individual member of Mountaineering Scotland or a member of a Mountaineering Scotland club, please send their details to membership@mountaineering.scot and we will link their existing database record to your club. 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 need to decide which one will be their "primary club" through which they pay their Mountaineering Scotland affiliation fee to avoid duplication of costs.

- 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 **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 chose their membership category as follows:
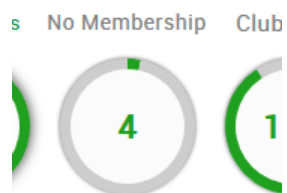
Club Profile

★ CLUB PROFILE   GO! CLUB DETAILS   👥 CLUB MEMBERS   🔖

Club Members
Below is a list of all your club members for you to view and manage

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 **3 dots** (options are Lapsed, Leave Club, Renew)

Click **Renew**

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
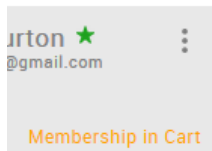- Unbeatable value mountain skills...

Read more

Club Adult

Click the membership.

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

If you click Save and Continue you see this:

Go to the checkout See Making Payments below.

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".

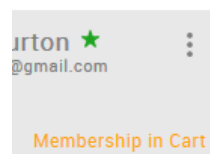- **To renew a single member**
    - o In the grid view click on the **3 dots** and click Renew
      or

      In the list view click on the menu and click

    - o Click the membership.
    - o Check the magazine and newsletter options then **Save and Continue** to the next member or go straight to the **Checkout.**
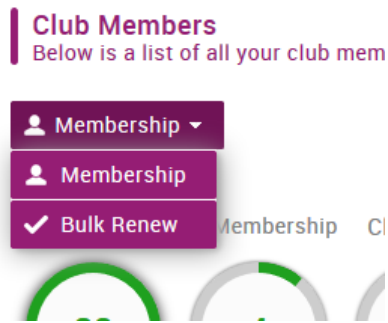

If you click **Save and Continue** you see this:

- **To renew several members**
    - o If is helpful to note if members have already been paid for by another club or have an individual membership. In either case the club does not need to pay for the member again.
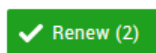
o Select **Bulk Renew**

Club Members
Below is a list of all your club mem

👤 Membership ▾

👤 Membership

✔ Bulk Renew   Membership   Cl

o Tick the members you wish to pay for. then click Renew (near the top of the screen)

Club Adult		✔
Club Adult		✔
Individual		✔

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

✔ Renew (2)

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

As in the renew guide above, click on the three dots or menu and select **Leave Club.**

7. Enter an event

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

- Select Events & Courses

📅
29
Events & Courses

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

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

Booking Details
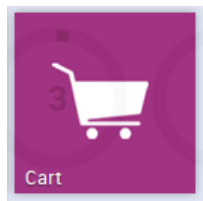
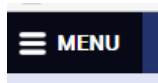👤 Book as an individual   ★ Group booking

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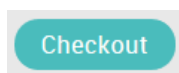

✓ Complete registration (1)

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

8. Making payments

- Go to the checkout:

☰ MENU

Cart

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

Checkout

Next

In the Checkout chose 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 for format PR12345

or

🔒 Pay with Card

VISA DISCOVER MasterCard AMERICAN EXPRESS