



Onboarding playbook: How to set up your PTA in MemberHub

1. Create your MemberHub account.

- Visit memberhub.com/login.
- Enter your email address.
- Choose the second option: "I need to create a password" and enter your first and last name.
- Check your inbox for a confirmation email. Enter the code from the email on the MemberHub site.

2. Activate your site & set the domain name.

- Log in and update your school's MemberHub site address, if prompted. Only the first site admin to log in will need to complete this step. Example: "ABCElementary.MemberHub.com"
- Note: If you *don't* see an **Admin Console** button in the upper right, please contact your state PTA office.

3. Update/add your officers.

- Select the **Admin Console** button in the upper right. You'll be taken to the PTA tab.
- On the right, click **Officers**. You'll see the officers from the current year and previous years MemberHub was used. After June 30, you can't remove past-year officer information due to state recordkeeping needs.
- Click the **Add Officer** button on the left under the officer list. In the popup, enter the officer's details and check whether to give them admin rights. Then, click the **Add Officer** button on the bottom.
- Note: Only your state's PTA-required officer roles are listed here, but you can still give officers with roles not listed admin access. Here's [how to give them admin rights](#).

4. Personalize your MemberHub site.

- Go to **Admin Console**, then **Settings**.
- Add your school's logo, colors, and social media links.

5. Important: Get set up to take payments online.

This step is important so you can sell memberships online ([which means way less work for you](#)), collect donations in your e-store, sell spirit wear, and more. An authorized signer on your PTA's bank account will need to complete this step. You'll also need your PTA's EIN and bank account information handy.

- Select the **Admin Console** button in the upper right.
- Click **Store Admin**, then **Merchant Processing Agreement**.
- See the [step-by-step guide](#) for completing the agreement. You'll most likely get instant approval.
- See this [fact sheet](#) on taking payments in MemberHub. You'll get FAQs on privacy, security, and how it works.

6. Add People to MemberHub.

There are several ways to add people to MemberHub so you can get your entire school community in one place!

- Import a list of non-members. [Here's how](#).
- [Add PTA members individually](#), or contact your state PTA office to import a list of members.
- Set up your [Site Joins](#) page to invite school families to sign up to receive communication through MemberHub.
- Invite families to purchase their PTA memberships in your school store (see Step 9 below)!

7. Build your hubs.

Hubs are secure distribution lists for your school communities -- PTA committees, grade levels, classrooms, clubs, teams and more. Here are three recommended hubs, but you can also get started by sending weekly PTA newsletters to your everyone hub. [Learn how to set up hubs](#).

- The Everyone hub (automatically in your account - just add people) -- you're one click from email and text to all school families. [Learn how to start sending your PTA newsletter](#).
- The PTA Board hub -- easily communicate with your fellow PTA leaders.
- The Transportation hub -- quickly get in touch with families of bus-riders.



8. Start communicating!

A great place to start is by sending weekly newsletters to keep your school families in the loop! [Here's how](#). You can also use hubs to share files and pictures, and create sign-ups for volunteers, items, and more -- all in one place! Once you're sending regular PTA communications through MemberHub, your school will have a valuable new fundraising channel that can earn as much as \$10K in email sponsorships for your school! [Learn more](#).

9. Start selling memberships and more in your school store.

Once you're set up to take payments online, you'll need to set up your store.

- In your **Admin Console**, go to the **Store Admin** tab. This will open the Admin screen of your MemberHub store in a separate tab.
- Click **Memberships**. Here, you'll see your standard state member types. They're already posted in your store, so all you have to do is click **Edit** to adjust pricing and other details. You can also [customize PTA membership types and pricing](#) for your school store.
- Then you can [add items](#) like spiritwear, donations, event tickets, and fundraisers to get the most out of your store and provide the ultimate flexibility to parents.
- **Tell everyone in your school community!** Get started with these sample communications for [back-to-school night](#) and for [general store promotion](#) by email, newsletters, or social media!

Visit <http://support.memberhub.com/hc/en-us> to get *Help Articles, FAQs and community discussion threads*.