# OurChapter.org

## Membership Roster Function.

This presentation will show you how to add your first Member in the "Membership Roster" function for this Website.

This website is FREE to use with any chapter within any organization.

All information entered is STRICTLY kept confidential. **
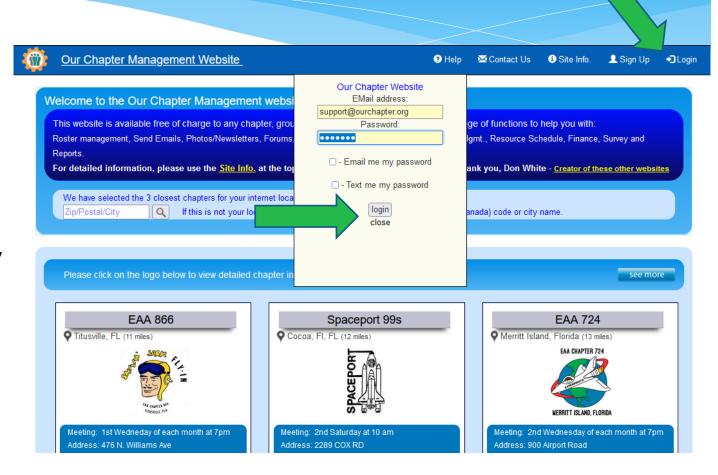
Don White – Feb. 1, 2024
Designer and developer of YoungEaglesDay.org, EAABuildersLog.org and FlyingStart.org websites.
** We do not distribute, market, sell or use your information outside of this website in any way. All member and chapter information is kept confidential to that chapter and/or organization.

# Roster – First Login.

**1.** Use the "Login" link at the top right to Login into the website.

**2.** Fill out your email and password and click the "Login" button in the window box.

# Roster – Add a member
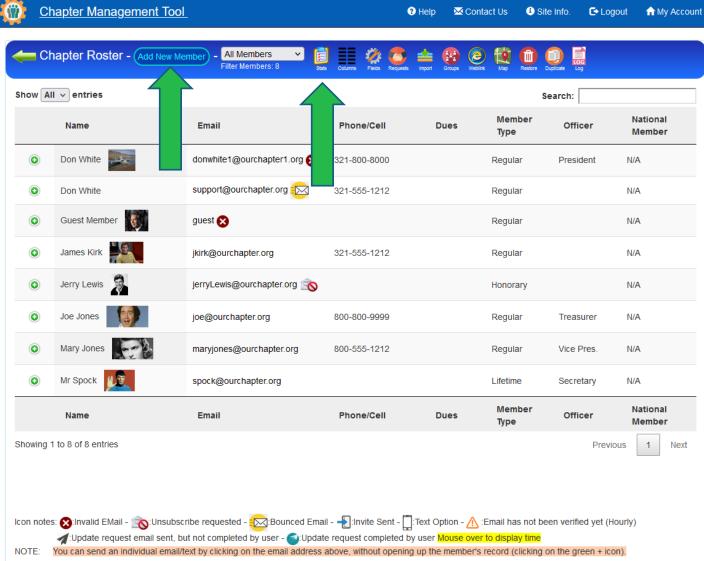
**1.** You can add members in two different ways, the "Member Roster" or "Import Member" function.

**2.** "Import Member" will import from a "CSV" formatted file.

**3.** We will be covering the "Member Roster" function in this presentation.
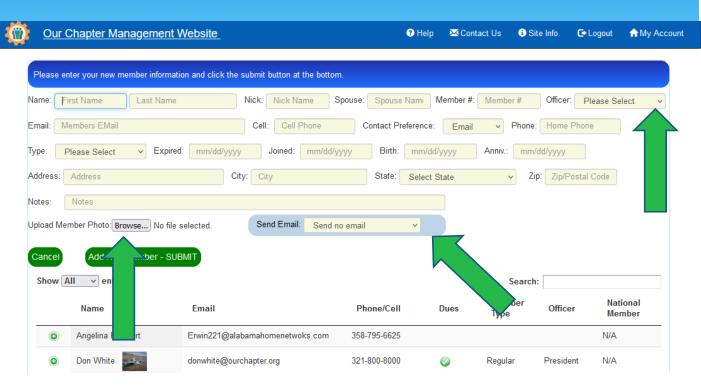
# Roster – Add a member

**1.** You can add a new Member by using the "Add New Member" button at the top.

**2.** Members can be filtered by using the pull down list where you see "All Members". This will show you the number of members in this filter.

**3.** Let's start by adding a new member by clicking the "Add New Member" button.



| | Name | Email | Phone/Cell | Dues | Member Type | Officer | National Member |
|---|---|---|---|---|---|---|---|
| ⊕ | Don White | donwhite1@ourchapter1.org | 321-800-8000 | | Regular | President | N/A |
| ⊕ | Don White | support@ourchapter.org | 321-555-1212 | | Regular | | N/A |
| ⊕ | Guest Member | guest | | | Regular | | N/A |
| ⊕ | James Kirk | jkirk@ourchapter.org | 321-555-1212 | | Regular | | N/A |
| ⊕ | Jerry Lewis | jerryLewis@ourchapter.org | | | Honorary | | N/A |
| ⊕ | Joe Jones | joe@ourchapter.org | 800-800-9999 | | Regular | Treasurer | N/A |
| ⊕ | Mary Jones | maryjones@ourchapter.org | 800-555-1212 | | Regular | Vice Pres. | N/A |
| ⊕ | Mr Spock | spock@ourchapter.org | | | Lifetime | Secretary | N/A |

Showing 1 to 8 of 8 entries          Previous  1  Next

Icon notes: ❌:Invalid EMail - 🚫:Unsubscribe requested - 📧:Bounced Email - ➡️:Invite Sent - 📱:Text Option - ⚠️:Email has not been verified yet (Hourly)
✈️:Update request email sent, but not completed by user - 🌐:Update request completed by user Mouse over to display time
NOTE:    You can send an individual email/text by clicking on the email address above, without opening up the member's record (clicking on the green + icon).
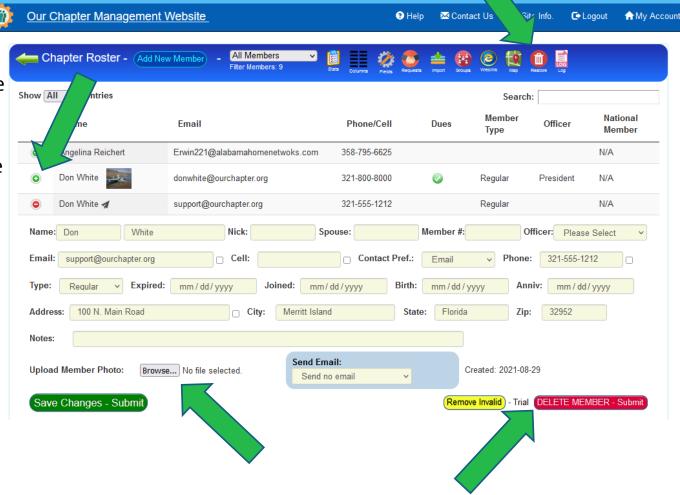
# Roster – Add a member

**1.** Fill in the form that will be dynamically add to the top of the page.

**2.** Special Fields:
 - Officer:  Select if member is an officer.
- Contact Preference: Email or Text (SMS).
- Type: Member type, used for filtering.

**3.** Use the "Browse" button to upload a member picture.  This will be including in chapter reports.

**4.** "Send Email" option will email that member for updates.
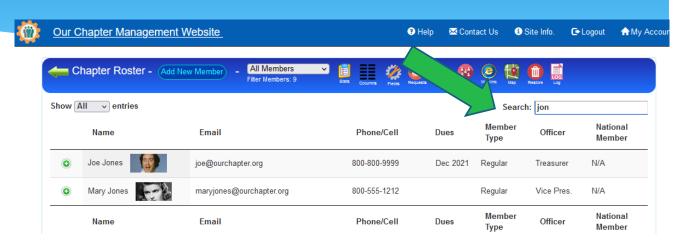
# Roster – Edit a Member

**1.** Click the green "+" icon to expand the member record. Click the red "-" icon to return without saving changes.

**2.** Fill in the field (just like the New Member.

**3.** Use the "Browse" button to upload a member picture.

**4.** To "Delete" a member, click the red "DELETE MEMBER" button.

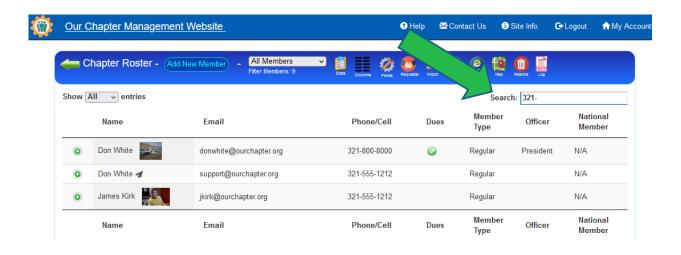**5.** The "Restore" icon at the top (red "Trash can) can restore deleted members at the top.

# Roster – Search for a member

**1.** Type is a few characters to dynamically search for members. This can be for any column.

**2.** Top example is for the "jon" that filters all of the "Jones" members in the "Name" column.

**3.** Bottom example is for the "321" as the area code in the "Phone" column.

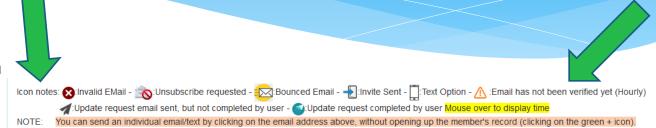**4.** To restore members, erase the search box entry and all of the members will dynamically be restored.

# Roster – Icons

**1.** At the bottom of the Roster, you will see Icon Notes. This provides a quick way to find the meaning of an Icon.

**2.** Through out this website, you can always mouse-over an "Icon" to find the meaning and usually some additional information.

**3.** Use the "Previous", Page # or "Next" to display additional members.

Icon notes: ❌:Invalid EMail - 🚫:Unsubscribe requested - ✉:Bounced Email - ➡:Invite Sent - 📱:Text Option - ⚠ :Email has not been verified yet (Hourly)
✈:Update request email sent, but not completed by user - 🌐:Update request completed by user Mouse over to display time
NOTE:    You can send an individual email/text by clicking on the email address above, without opening up the member's record (clicking on the green + icon).

# Roster – Send individual email / text to a member

| | | | | | | |
|---|---|---|---|---|---|---|
| ⊕ | Joe Jones | joe@ourchapter.org | 800-800-9999 | Regular | Treasurer | N/A |
| ⊕ | Mary Jones | maryjones@ourchapter.org | 800-555-1212 | Regular | Vice Pres. | N/A |
| ⊕ | Mr Spock | spock@ourchapter.org | | Lifetime | Secretary | N/A |

**1.** You can send an individual email or text message to a member by clicking on the member's email address.

**2.** A popup window will allow you to select several options, including to save the message for another member.

**3.** By clicking the "Your Past Messages", this will show your past year of messages.

**4.** After the message has been sent, you can close this popup window to return on the Roster.

← Send Message to: Joe Jones - (Your Past Messages)

**Email:** joe@ourchapter.org   **Cell Phone:** 800-800-9999

**Saved Msgs:** You have 1 saved messages. Click to view and copy message.

**Send Via:** ◉ - Email   ○ - Text/ Cell Phone   - Text/SMS sent from: 1-877-321-3040

File  Edit  View  Insert  Format  Tools  Table  Help

Type your message here. Member's first name will automatically be added.

P                                                    0 WORDS  POWERED BY TINY

**Save Title:** Provide title if you want message saved for future use

**Private:** ☐ - Save this as a private message, if "Save Title" is filled out
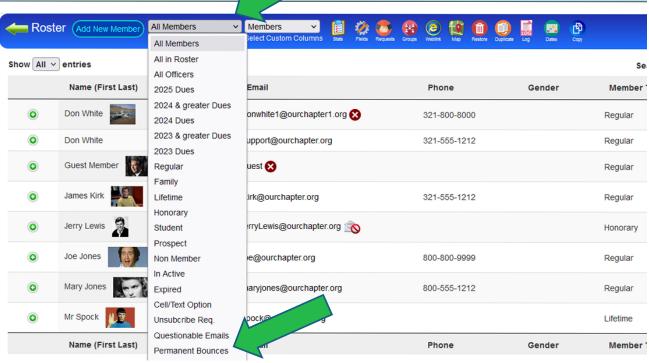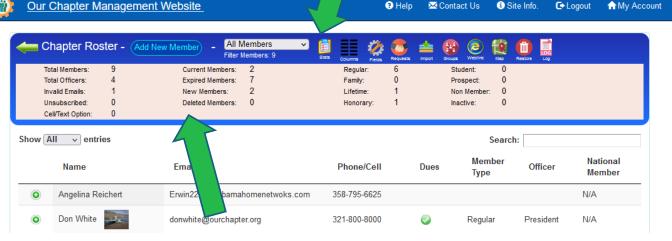
**Send Message - Submit**

# Roster – Filter Members

**1.** Click the "Filter Members" pull down to display filters and Groups, if defined.

**2.** Select that Filter or Group to redisplay those members.

**3.** The "Permanent Bounces" filter will show all members that have emails that are bad or that member has issued a complaint against your campaign.

# Roster – Statistics Report



**1.** Click the "Stats" icon at the top to display membership information.

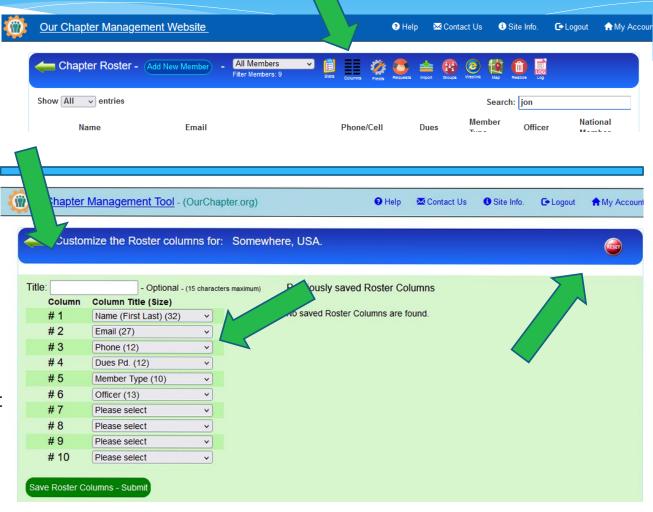**2.** Click the "Stats" icon again to return.

## Membership Types:

- ➢ Regular      - Individual member.
- ➢ Family       -  Member with a family member/spouse
- ➢ Lifetime     - Member that's a lifetime member of the chapter
- ➢ Honorary   - Honorary member, no dues required
- ➢ Student      - Student member
- ➢ Prospect     - A potential member, can be automatically deleted by system
- ➢ Non Member - Keep on mailing list but who you don't expect to ever join.
- ➢ In-Active     - Members that are in active.

Note:  Any member can be deleted by expanding that member record and "Delete Member" button.

# Roster – Display your Columns

**1.** If you don't like the default columns for your Roster, just click on the "Columns" icon to customize.

**2.** You can select the field that you want in that column. This selection will saved your Roster view.

**3.** If you want to reset the columns to the "Default" view, click the "Reset" icon at the top right.

**4.** To return without any changes, click the Green left arrow icon on the top left corner. This will return to the previous page. This works on all pages for this website.
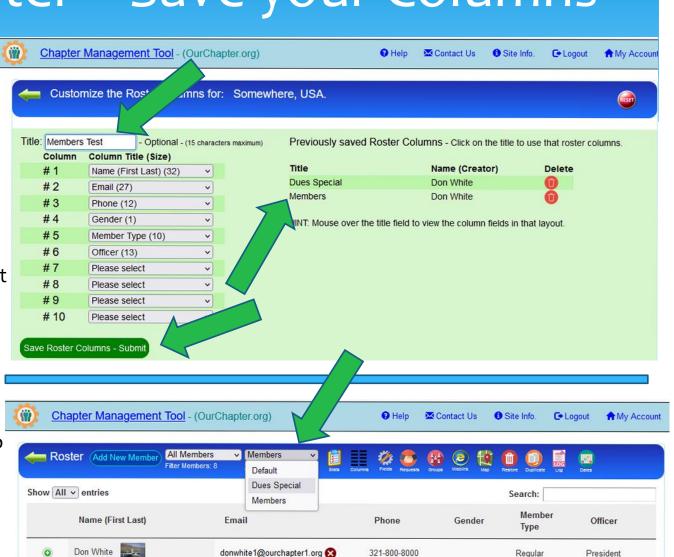
# Roster – Save your Columns

**1.** You can create multiple custom columns by Title. Just enter a Title, select your columns and "Save Roster Columns".

**2.** These will appear on the right column so you can edit or delete them.

**3.** Since you have a custom column saved, a column selection will appear.

**4.** You can switch between multiple custom columns to better display your membership.

Chapter Management Tool - (OurChapter.org)    ? Help    ✉ Contact Us    ℹ Site Info.    ➦ Logout    🏠 My Account

Customize the Roster Columns for: Somewhere, USA.    RESET

Title: Members Test    - Optional - (15 characters maximum)

| Column | Column Title (Size) |
|--------|---------------------|
| # 1 | Name (First Last) (32) |
| # 2 | Email (27) |
| # 3 | Phone (12) |
| # 4 | Gender (1) |
| # 5 | Member Type (10) |
| # 6 | Officer (13) |
| # 7 | Please select |
| # 8 | Please select |
| # 9 | Please select |
| # 10 | Please select |

Save Roster Columns - Submit

Previously saved Roster Columns - Click on the title to use that roster columns.

| Title | Name (Creator) | Delete |
|-------|----------------|--------|
| Dues Special | Don White | 🗑 |
| Members | Don White | 🗑 |

HINT: Mouse over the title field to view the column fields in that layout.

Chapter Management Tool - (OurChapter.org)    ? Help    ✉ Contact Us    ℹ Site Info.    ➦ Logout    🏠 My Account

Roster  (Add New Member)   All Members ▾   Members ▾   Stats Columns Fields Requests Groups Weblink Map Restore Duplicate Log Dates
Filter Members: 8

Default
Dues Special
Members

Show [All ▾] entries    Search:

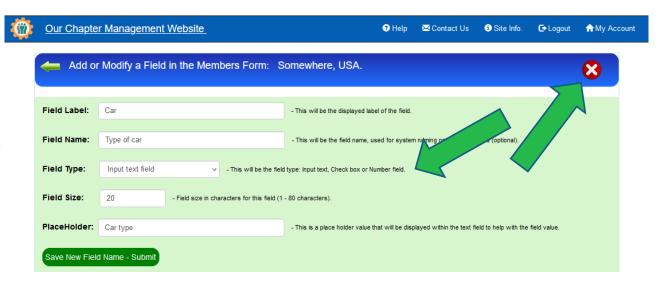| | Name (First Last) | Email | Phone | Gender | Member Type | Officer |
|---|-------------------|-------|-------|--------|-------------|---------|
| ⊕ | Don White | donwhite1@ourchapter1.org ❌ | 321-800-8000 | | Regular | President |
| ⊕ | Don White | support@ourchapter.org | 321-555-1212 | | Regular | |

# Roster – Customize Fields

**1.** If you need additional fields for your members, just click the "Fields" icon.

**2.** You can select the field that you want in that column. This selection will saved your Roster view.

**3.** If you want to reset the columns to the "Default" view, click the "Reset" icon at the top right.

**4.** To return without any changes, click the Green left arrow icon on the top left corner. This will return to the previous page. This works on all pages for this website.
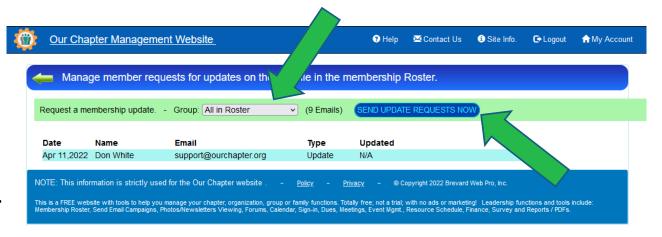
# Roster – Request Updates

**1.** You can request a bulk update for your members by using the "Request" icon at the top of the page.

**2.** You can select the group to send the email request to and then click the "Send Update Requests Now" button.

**3.** A list of members that received an update request will be below.  When the update from the member has been entered, the Update column will be filled.

**4.** You can also request an update by using the "Update" command in a Campaign email or text.
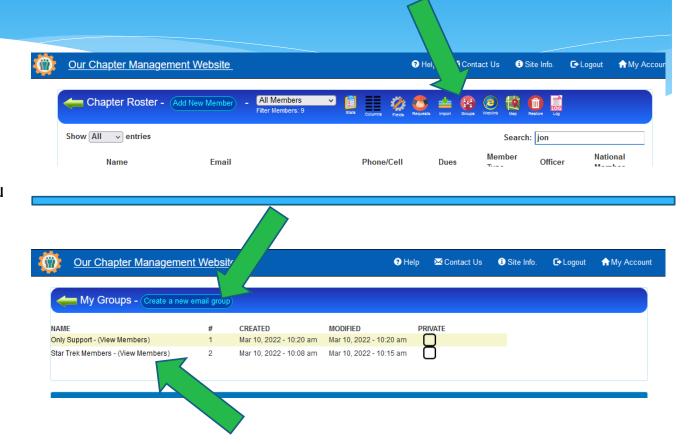
# Roster – Groups

**1.** You can create a "Group" of members by using the "Group" icon at the top.

**2.** You will see your existing "Groups" and you can create a "New Email Group". This will provide you a list of members to include in your "Group" with a Group Name.

**3.** Click the "View Members" to see or change your members within that Group.
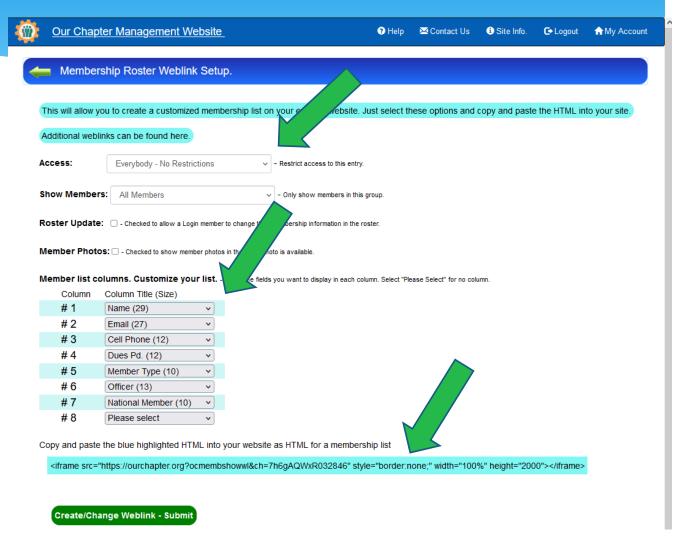
# Roster – Weblinks

**1.** "Weblinks" are a way to provide information on your existing Website and display information from this OurChapter site.

**2.** "Weblinks" are also real-time information. If you change a member on OurChapter, that change will show on your website also.

**3.** Continue to the next page on how to show your member information on your website.
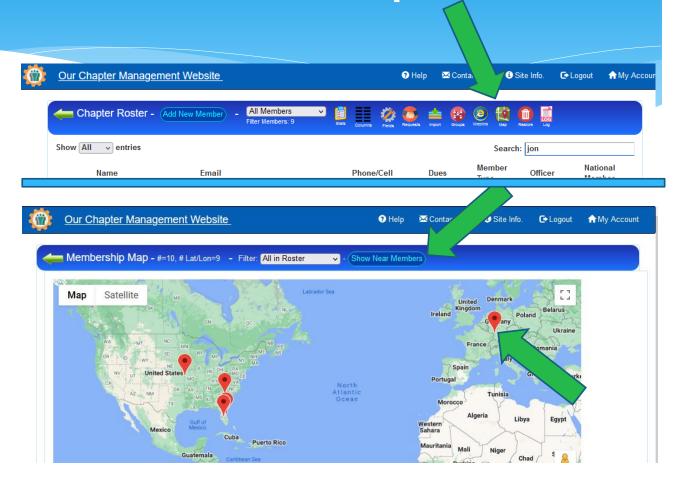
# Roster – Weblinks

**1.** "Weblinks" are very security sensitive. Just select the "Access" on who can display your information. This includes your "Groups". If not "Everybody", then each member will have an ID.

**2.** Select the information that will be displayed. If "Private" is checked on member information, then that will not be displayed.

**3.** Copy and paste this HTML link to your existing website once for real-time member list.

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**Our Chapter Management Website**

❓ Help   ✉ Contact Us   ❶ Site Info.   ⏻ Logout   🏠 My Account

### Membership Roster Weblink Setup.

This will allow you to create a customized membership list on your entire website. Just select these options and copy and paste the HTML into your site.

Additional weblinks can be found here.

**Access:** | Everybody - No Restrictions ▾ | – Restrict access to this entry.

**Show Members:** | All Members ▾ | – Only show members in this group.

**Roster Update:** ☐ - Checked to allow a Login member to change the membership information in the roster.

**Member Photos:** ☐ - Checked to show member photos in the photo is available.

**Member list columns. Customize your list.** - the fields you want to display in each column. Select "Please Select" for no column.

| Column | Column Title (Size) |
|--------|---------------------|
| # 1 | Name (29) ▾ |
| # 2 | Email (27) ▾ |
| # 3 | Cell Phone (12) ▾ |
| # 4 | Dues Pd. (12) ▾ |
| # 5 | Member Type (10) ▾ |
| # 6 | Officer (13) ▾ |
| # 7 | National Member (10) ▾ |
| # 8 | Please select ▾ |

Copy and paste the blue highlighted HTML into your website as HTML for a membership list

`<iframe src="https://ourchapter.org?ocmembshowwl&ch=7h6gAQWxR032846" style="border:none;" width="100%" height="2000"></iframe>`

**Create/Change Weblink - Submit**

# Roster – Map

**1.** This will display the location of your members that includes an address.

**2.** You can filter them by Groups, Show All or Show Near Members.

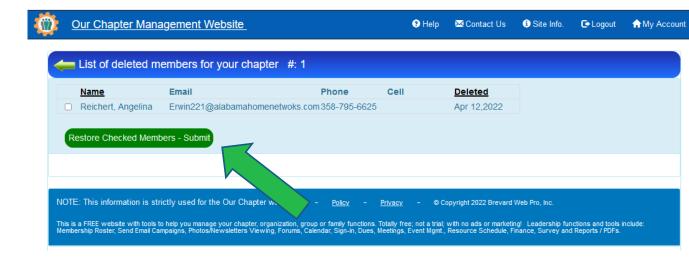**3.** Mouse over the red location markers to display member information.

# Roster – Restore



**1.** You can "Restore" deleted members with this option.

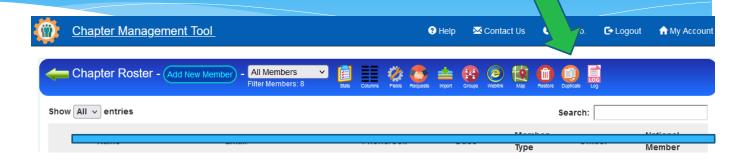**2.** Just check the member(s) that you want to restore and click the green "Submit" button.

# Roster – Duplicate

❓ Help   ✉ Contact Us   ⊕     o.   ↩ Logout   🏠 My Account

← Chapter Roster - ( Add New Member ) - [ All Members ▾ ]
Filter Members: 8

Stats  Columns  Fields  Requests  Import  Groups  Weblink  Map  Restore  Duplicate  Log

Show [ All ▾ ] entries                                    Search: [            ]

**1.** You can show "Duplicate" member with this option.

**2.** If you have duplicate names, emails or phone numbers, this will list those members.

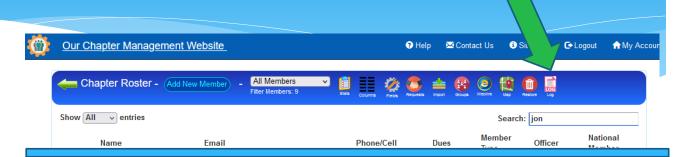**3.** You can use the "Fields for duplicate check" pulldown to check for other fields.

❓ Help   ✉ Contact Us   ⓘ Site Info.   ↩ Logout   🏠 My Account

← - Check for duplicate information.  - Fields for duplicate check: [ Only duplicate First and Last Name ▾ ]

| Last Name | First Name | Email Name | Phone | Cell | Created | Modified | Last Modified By |
|-----------|-----------|------------|-------|------|---------|----------|------------------|
| White | Don | donwhite1@ourchapter1.org | 321-800-8000 | 321-800-8000 | Mar 03, 2021 | Apr 15, 2022 | N/A |
| White | Don | support@ourchapter.org | 321-555-1212 | | Aug 29, 2021 | Apr 11, 2022 | N/A |

# Roster – Log

**1.** The "Log" icon will display all activity with the Roster.

**2.** This will include the person who did the change, including all fields within a Member record.
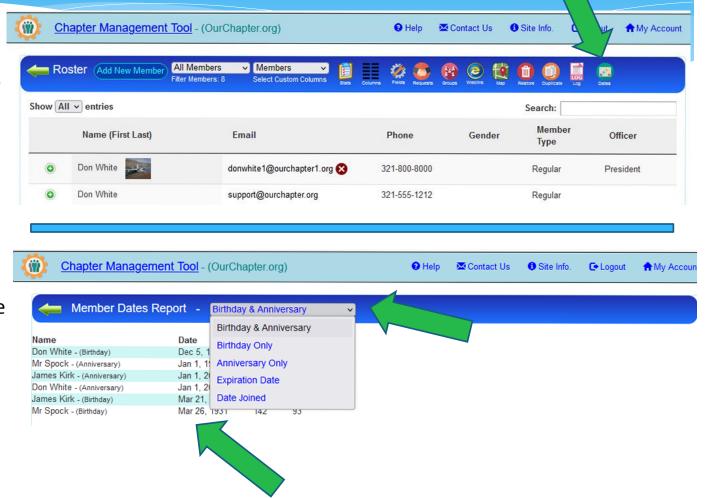
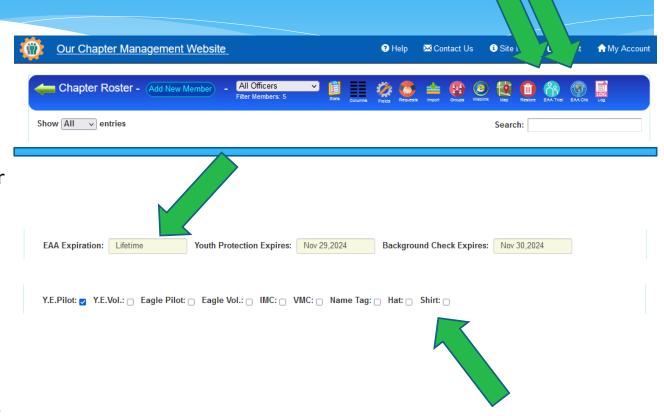**3.** This Log can not be changed and is read only.

# Roster – Membership Dates

**1.** By selecting the "Date" icon, you can get a list of membership birthdays and anniversaries.

**2.** The function will also display Only Birthdays or Anniversary, Expiration and Joined dates.

**3.** Information will include the # of Days left and Years Ago for each date.

# Roster – EAA only additions

**1.** The EAA chapters have two additional icons:
- EAA Trial – Display the 6 month trial submissions for your members.
- EAA Chk – Will recheck your member's EAA membership & YPP

**2.** Two additional lines are automatically included in your members information.
- EAA National Membership
- YPP Training & Background check
 -Nine additional checkboxes

**3.** For member updates, they will be asked if they are a national member, if not a 6-month free trial is offered.

Note:  This website is NOT associated with the EAA organization, just an active member.

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Our Chapter Management Website

❓Help   ✉️Contact Us   ℹ️Site    My Account

Chapter Roster - (Add New Member) - [All Officers ▾]
Filter Members: 5

Stats  Columns  Fields  Requests  Import  Groups  Weblink  Map  Restore  EAA Trial  EAA Chk  Log

Show [All ▾] entries                    Search: [        ]

EAA Expiration: [Lifetime]   Youth Protection Expires: [Nov 29,2024]   Background Check Expires: [Nov 30,2024]

Y.E.Pilot: ☑   Y.E.Vol.: ☐   Eagle Pilot: ☐   Eagle Vol.: ☐   IMC: ☐   VMC: ☐   Name Tag: ☐   Hat: ☐   Shirt: ☐

# Conclusion / Questions

* Questions / Comments:  Use the "Contact Us" link

* Best free website for organizations to manage and grow memberships.