

ARCHERY CANADA

MEMBERSHIP SYSTEM PTSO/CLUB ADMINS

HOW TO BULK UPLOAD MEMBERS

 JAN 2021



HOW TO REGISTER IN 2M

PTSO ADMINISTRATORS AND/OR CLUB ADMINISTRATORS ARE CAPABLE OF UPLOADING A SPREADSHEET OF PAID MEMBERSHIPS INTO THE SYSTEM TO MASS UPLOAD THEIR MEMBERSHIP

THIS PROCESS WILL AUTOMATICALLY RUN IN THE BACKGROUND, AND PROVIDE THE ADMIN WITH AN INVOICE TO BE ISSUED TO THE CLUB FOR PAYMENT

HOW TO REGISTER IN 2M

THE FIRST STEP OF THIS PROCESS IS TO ENSURE THE CLUB IS REGISTERED AND RENEWED IN THE 2M DATABASE.

DIRECT THE CLUB ADMINISTRATOR TO YOUR MEMBERSHIP LANDING PAGE AND HAVE THEM COMPLETE THEIR CLUB RENEWAL

WHEN COMPLETE, THEY SHOULD SEND AN EMAIL TO PHIL DEGUISE AT INTERPODIA, TO SET UP THE INVOICING PAYMENT GROUP

PDEGUISE@INTERPODIA.CA

HOW TO REGISTER IN 2M

ONCE THE CLUB IS REGISTERED, THE CLUB ADMINISTRATOR SHOULD COMPLETE THE MEMBERSHIP UPLOAD EXCEL SHEET, WHICH CAN BE DOWNLOADED FROM THE ARCHERY CANADA WEBSITE.

PAY CLOSE ATTENTION TO THE DATE FORMAT FOR BIRTHDATES AS WELL AS, THE FOLLOWING FIELDS, WHICH ARE DROP DOWN OPTIONS:

GENDER

MEMBERSHIP TYPE

MEMBERSHIP NODE

COUNTRY

PROVINCE

HOW TO REGISTER IN 2M

AT THIS TIME, ONCE THE EXCEL SHEET IS COMPLETE, THE CLUB ADMINISTRATOR SHOULD FORWARD THE SPREADSHEET TO THEIR PTSO MEMBERSHIP CHAIR FOR UPLOAD.

HOW TO REGISTER IN 2M

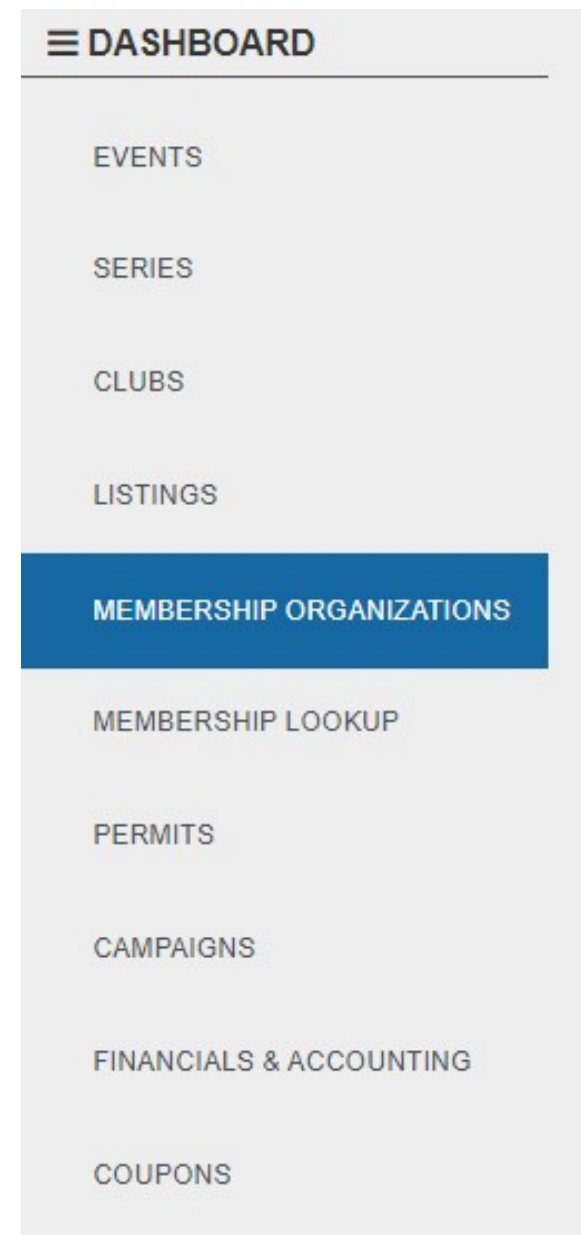
WHEN RECEIVED, THE PTSO ADMINISTRATOR SHOULD ACCESS THEIR DASHBOARD

The screenshot displays the 2M dashboard interface. At the top, there is a navigation bar with the 2M logo on the left and links for English, Français, About, Support, Find, Tools, and Kylah on the right. A sidebar on the left contains a menu with the following items: DASHBOARD, EVENTS, SERIES, CLUBS, LISTINGS, MEMBERSHIP ORGANIZATIONS (highlighted in blue), MEMBERSHIP LOOKUP, PERMITS, CAMPAIGNS, FINANCIALS & ACCOUNTING, COUPONS, REFUNDS, CART PAYMENTS, CUSTOMER SEARCH, USERS, PEOPLE, and REGISTRATIONS. The main content area is titled 'MEMBERSHIP ORGANIZATIONS' and features a search bar with a magnifying glass icon and a search button, along with an 'Import Memberships' button. Below this is a table with two columns: 'ID' and 'Name'. The table contains the following data rows:

ID	Name
97	Archery Newfoundland - Club Affiliation
96	Archery Newfoundland - 2021 Membership
95	Yukon Archery - Club Affiliation
94	Yukon Archery - 2021 Membership
92	Archery NT - Club Affiliation
91	Archery NT - 2021 Membership
90	Archery New Brunswick - Club Affiliation
89	Archery New Brunswick - 2021 Membership
88	Archery Nova Scotia - Club Affiliation

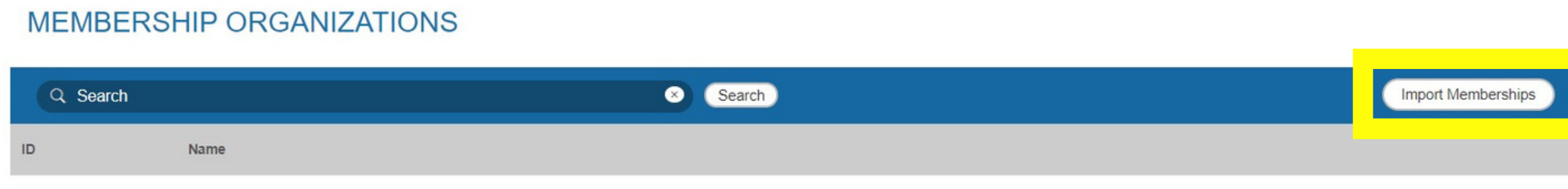
HOW TO REGISTER IN 2M

ON THEIR DASHBOARD, GO TO MEMBERSHIP ORGANIZATIONS IN THE LEFT SIDE MENU



HOW TO REGISTER IN 2M

ON THIS SCREEN, IN THE TOP RIGHT HAND CORNER YOU WILL SEE "IMPORT MEMBERSHIPS". SELECT THIS



HOW TO REGISTER IN 2M

The screen to the left should appear.
Select the appropriate club

Read over the information, and agree to
the prompt

Click Select File, and select the file to
upload.

Select Upload File. The system will
automatically begin to upload the data.
You can close the window at this point.

Import Memberships ✕

Import memberships to *

Select a membership organization ▼

If required PTSSO waivers or agreements are configured the members will be automatically emailed their waiver(s). Please note a Parent/Guardian name & email is recommended for minors. A memberships will not be issued until the member waiver(s) is agreed to.

I declare that the data being imported is accurate and complete. Any errors in the data being imported are my responsibility. If erroneous data is created via this import, I understand that data cleanup, fixes or any other changes needed will have to be dealt with between the club & the PTSSO and may result in costs from 2M.

I agree

Send Confirmation emails:

Select File Upload File

Selected File: No file selected

HOW TO REGISTER IN 2M

Please be patient. The more memberships in the file, the longer the process will take.

100 memberships will take approx 10 minutes.

Again though the window does not need to be open once uploaded.

Import Memberships ✕

Import memberships to *

Select a membership organization ▼

If required PTSO waivers or agreements are configured the members will be automatically emailed their waiver(s). Please note a Parent/Guardian name & email is recommended for minors. A memberships will not be issued until the member waiver(s) is agreed to.

I declare that the data being imported is accurate and complete. Any errors in the data being imported are my responsibility. If erroneous data is created via this import, I understand that data cleanup, fixes or any other changes needed will have to be dealt with between the club & the PTSO and may result in costs from 2M.

I agree

Send Confirmation emails:

Select File Upload File

Selected File: No file selected

HOW TO REGISTER IN 2M

When complete, the administrator will receive an email, summarizing the result of the import. This report will include the number registered, notify of any errors in the files, or if any duplicate members were attempted to be imported. It will NOT import duplicates.

If any errors, please review your sheet, and you can reupload when ready

info@2mev.com via sendgrid.info
to me ▾

Fri, Jan '21



Hi Kylah,
you recently imported memberships for ██████████ - 2021 Membership and ██████████
██████████, 2021 2M.

Here are the results of your import:

██████████ - 2021 Membership memberships successfully created: 2

Duplicate records identified (not created): 0

Rows with errors (not created): 5

HOW TO REGISTER IN 2M

All memberships imported will be initially marked in a PROCESSING status. Archers will automatically be sent their Waivers to complete when the file is uploaded. Once the waivers are agreed to, their membership will be changed to an ISSUED status, and their PTSO confirmation email @ member card will be sent.

info@2mev.com via sendgrid.info
to me ▾

Fri, Jan '21



Hi Kylah,
you recently imported memberships for ██████████ - 2021 Membership and ██████████
██████████ on 2M.

Here are the results of your import:

██████████ - 2021 Membership memberships successfully created: 2

Duplicate records identified (not created): 0

Rows with errors (not created): 5

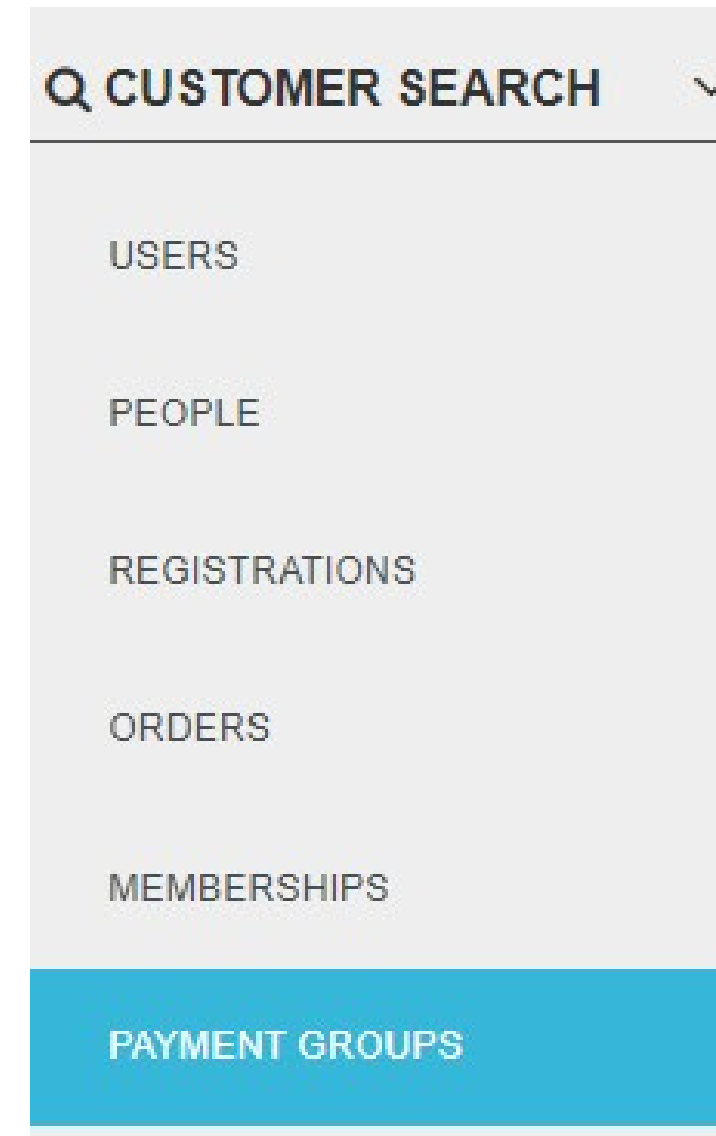
HOW TO REGISTER IN 2M

Once the upload is complete the PTSO administrator will be able to download the Clubs Invoice.

Go to PAYMENT GROUPS in your menu selection

When the page opens, select the appropriate club.

You can scroll down to Invoice to download and send to the club. This is also where you will process/record payment



HOW TO REGISTER IN 2M

There is an option to enter Credit Card details on this page or record as offline payment.

Note: There are processing fee's automatically added to the invoice. If paying by Credit Card, the fee's will be automatically collected.

If an offline payment is processed, Interpodia will invoice the PTSO for the processing fees.

Fees are:

- Credit Card: 5% (2.9%+\$0.30 to WePay, and 2.1% to Interpodia)
- Offline: \$1.50 + tax to Interpodia