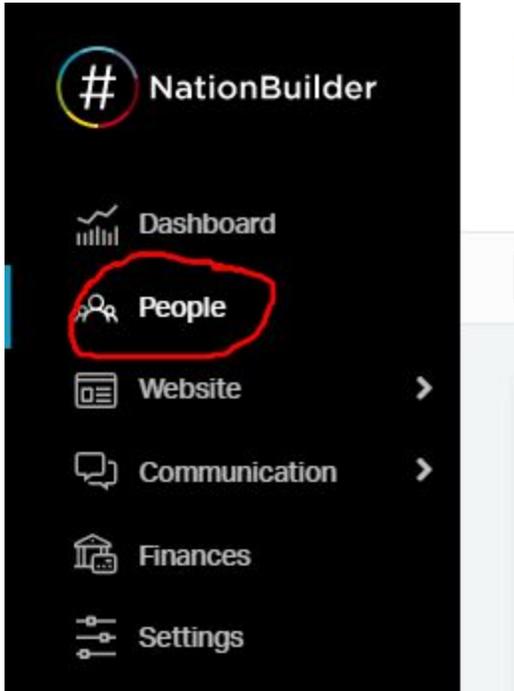


This document will walk you through the steps for entering a new member from scratch. Step 4 indicates how to select an existing member to change their membership status or update their contact information.

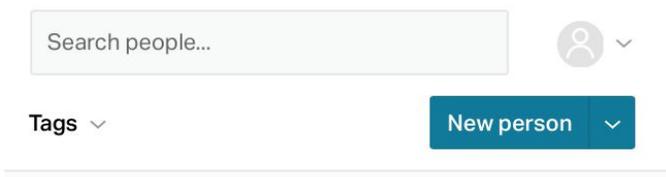
1. Log into the Control Panel of NB using your Control panel credentials.
2. Your menu will look like this:



3. Select the People menu choice encircled in red above.
4. If you are updating an existing member you will begin typing their name in the “Search people” box in the upper right-hand corner of your screen as indicated by the red arrow in the screenshot below. Please note that NationBuilder matches on the full name entered in this field, and may not recognize nicknames. If you don’t find a known member in the database, try searching only using their last name, then select from the list that NB provides.



5. If you are adding a new member, click on the “+ New person” menu choice in the upper right-hand portion of your screen



6. Fill in all of the fields you have information for on the Contact details page.

Contact details

First name

Last name

Receive emails

Prospect

Support level

Select ▾

Inferred support level

Select ▾

Priority

Fill in everything you can. There are all kinds of hyperlinks to allow you to add information like home phone numbers, work phone numbers, etc.

All new members should have the +Add tags field filled in with the following entries:

member, mdvoter, sbl and League (like **WashCo**)

sbl Tags person to receive the State Board Letter from LWVMD

mdvoter Tags person to receive the Maryland Voter, a periodic publication from LWVMD

In place of **WashCo** you will enter the code for your local league (there is a Google Doc with the list of codes, too). When you are typing information on a new tag, notice that NB is searching for matches for you. This will help you get the codes spelled correctly! Pick the one that is the right match.

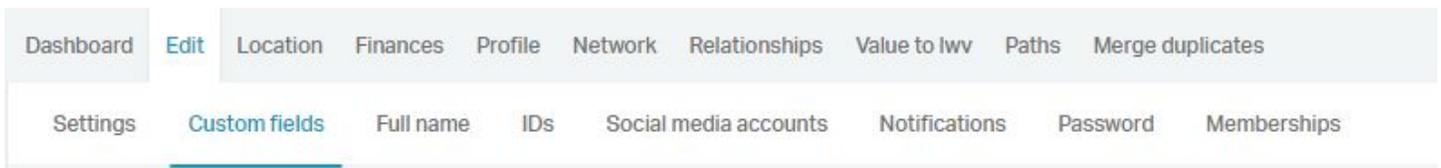
In addition to the tags listed above, a **student** tag has been created to identify and facilitate communications with student members. Please include this tag when adding new student members.

Be sure to click on the  **blue icon in the lower left-hand corner of this page when you are done to save your work!**

When you save your entry, a box will pop up confirming the addition and containing a live link with the name of the new contact. To continue, click on this link or type the individual's name in the white "Search people" box we used in step 4.

7. Notice that there is now a submenu below the person's individual data. It always displays the person's Dashboard entries. Today you will click on the next choice: Edit.

8. Now you will notice that NB adds an additional sub-menu of choices.



The image shows a horizontal menu for a contact's dashboard. The menu items are: Dashboard, Edit, Location, Finances, Profile, Network, Relationships, Value to lww, Paths, Merge duplicates, Settings, Custom fields, Full name, IDs, Social media accounts, Notifications, Password, and Memberships. The 'Edit' and 'Custom fields' items are highlighted with a blue underline.

9. Click on “Custom fields” and fill in values for the fields indicated below:

League ID

Member expire date

Member status

Member type

To purchase this ticket for someone else, provide the name(s) here:

Notes

First joined date

Last modified date

Modified by

LWVUS_ID

Office or portfolio held in local league

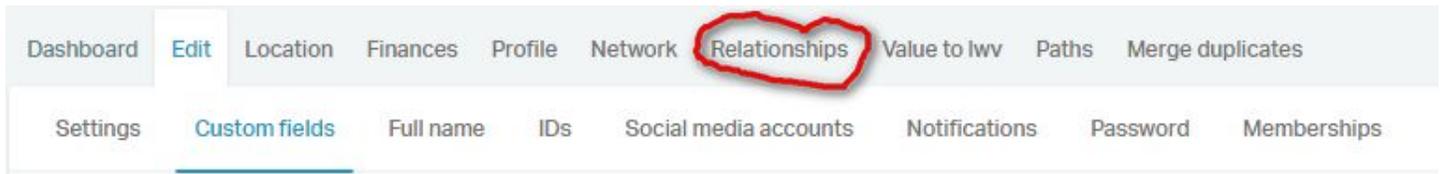


When you are done, be sure to save.

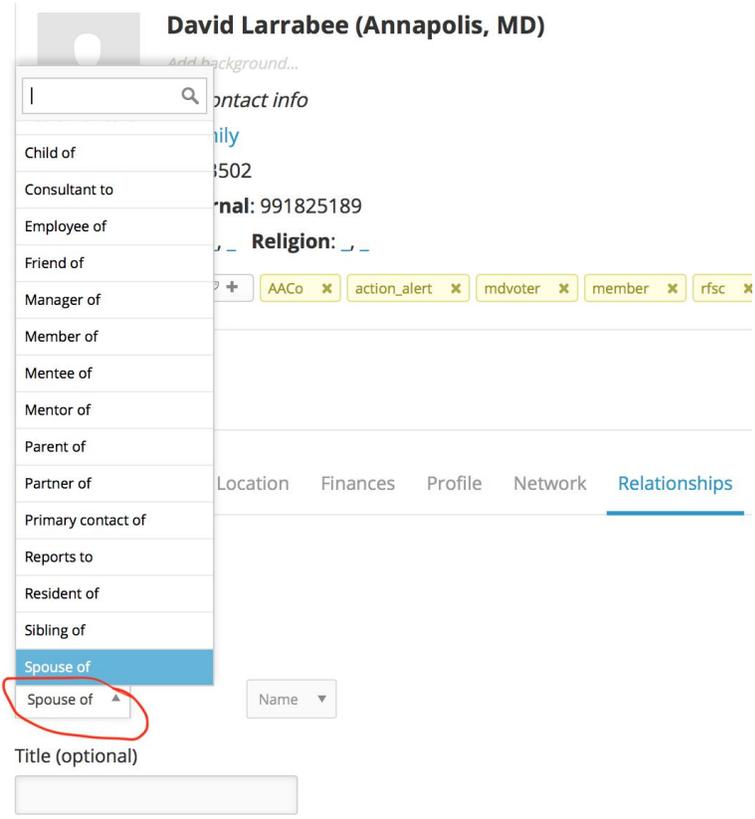
Enter your **League ID**. (There is a help document that lists League IDs; e.g. the League ID for Washington County is MD111. The **member status** choices are “active” or “expired”. The **member types** are “Primary”, “Additional”, “Student” or “Life”. Use the **Notes** field to record any membership-related information.

You can see that there are fields you may choose to fill in, like the office held in the local League.

10) If this is a household membership, create a separate “new person” for the additional member. After completing the preceding steps, click on the Relationships tab:



When you click on Relationships, you will see a box on the left that defaults to the value “Alum of.” Click on the arrow to display a menu of possible relationships between the household and primary member.



Next, click on the Name box, and begin typing the name of the primary member.



Select the correct person and click on “Save Relationship” at the bottom of the page. The primary and household members’ pages will now indicate their relationship, as below:

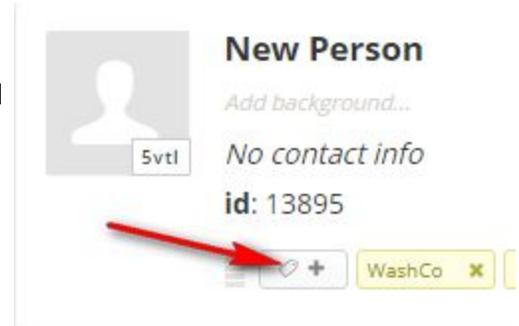


11) When members renew, please follow the preceding steps making sure to update the Member Status and Expire Date custom field.

- 12) If a member does NOT renew, be sure to change the Member Status custom field to “expired.”
Remove the “member” tag by clicking the little “x” that I circled.



Then add an “Expired” tag in its place by clicking the icon at the left end of the line of tags shown by the red arrow here, and selecting the correct tag.



- 13) In the sad case of a deceased member, please remove the “member” tag as above and add the “deceased” field value. On the member’s “edit” page, expand the **+ Demographics** section and click the box next to Deceased at the very bottom of the list of field possibilities.

Birth date

Deceased

Finally, go to Custom fields, click the “x” next to “active” or “expired” in the member status field, leaving it blank. Enter the date of death (if known) in the Notes field and save your changes to the custom values.

League ID
MD100

First joined date
10/28/04

Member expire date

Member status
Select

Member type
x Primary

Last modified date
Wed Aug 24 21:28:30 GMT 2016

Modified by

Notes
Died 11/22/2020

Save custom values

Leagues that have chosen to automate the renewal process have one additional step to take.

This is covered in a separate help document entitled **“Automated memberships”**.