

# Managing Your Club Online

Club presidents and treasurers, we thank you for your support in managing your club's affairs online. We rely on you to help us keep our records up-to-date and accurate.

No matter what you are looking to accomplish, you can do it online:

- Add, reinstate and resign members.
- Edit club and members' contact information.
- View club invoices and membership lists.
- Pay international dues.

Completing these activities online can cut down processing time by days or even weeks.

# Please follow the step-by-step instructions below to manage your club online:

1. **Login**: Go to <a href="https://zonta.org/">https://zonta.org/</a> and click **Sign In** at the top of the page.



Our Causes Our Programs News & Events About Us Get Involved Your Support My Zonta

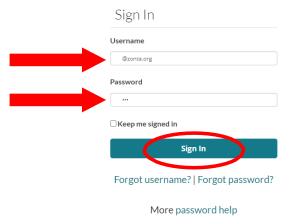


Why Zonta?

We believe in making the world a better place by empowering women.

We find joy in doing this in a supportive community of like-minded professionals from

2. Once prompted, enter your email address as your username and then enter your password. When finished, click the **Sign In** button.

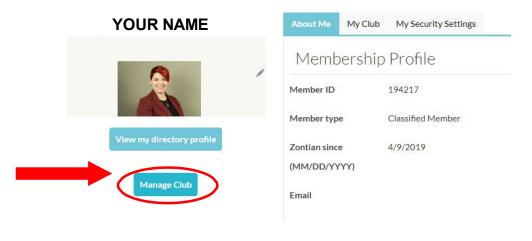


3. Click on your name at the top of the page to be redirected to your My Zonta Profile.





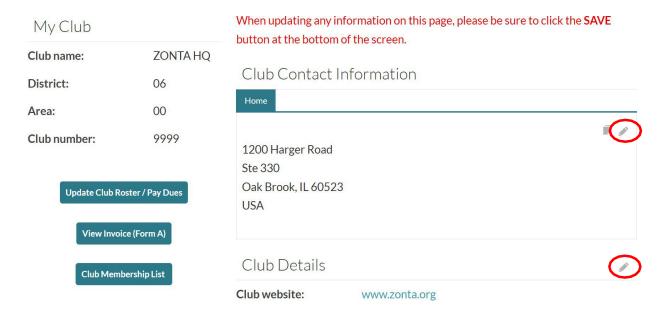
4. Click the **Manage Club** button to view your club's profile. If you do not see this button, please ensure you have submitted your Club Officer Form and contact the Membership Department at memberrecords@zonta.org.



5. To edit club members' information, scroll down until you see <u>Club Contacts</u>. Locate the member whose information you want to edit and click their name. If you want, you can also export your club's contact list from here. If you note any member account duplicates, please let the Membership Department know.



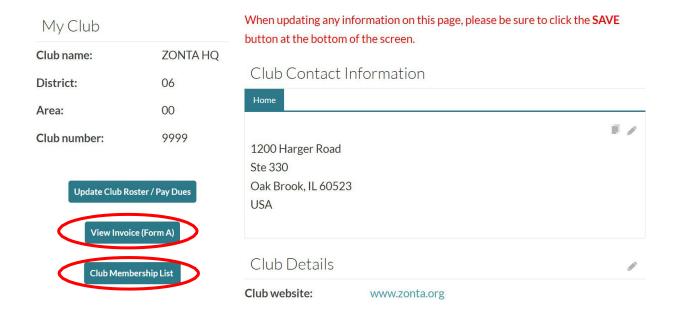
- 6. At the top of the page, you can view your club's district, area and club information (these cannot be edited), in the **My Club** section.
- 7. Edit your club's mailing address and public website by clicking the pencil icon to the right of the Club Contact Information section.
- 8. Edit your club's details, including website, meeting times, projects or focus, as well as a description by clicking the pencil icon at the top right of the Club Details panel. This information will be visible on the Locate a Club results for prospective members to view.
- 9. Enter the approximate number of Z and/or Golden Z club members in the **Z Club/Golden Z Club Details** section. Please complete this section, even if the number is 0.



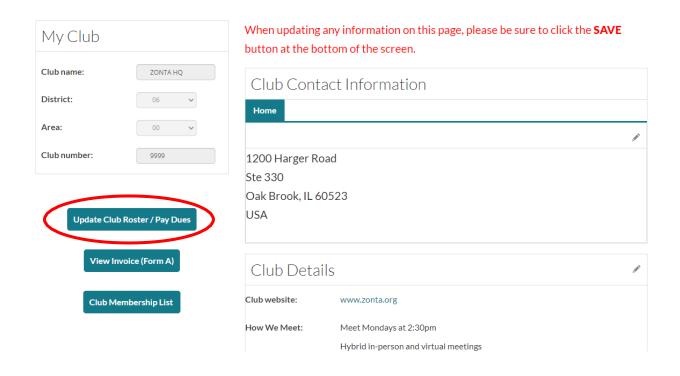
To save any changes to the above sections, you must click the **Save & Close** button at the bottom of the screen.



10. To view a current invoice or club membership list click the **View Invoice (Form A)** or **Club Membership List** buttons.



11. To add new members, resign members, update your club's invoice, and/or pay dues, click the **Pay Dues/Manage Club Roster** button on the bottom left of the screen.



### **Important Notes**

- Members added between 1 June and 30 November will be billed for full-year dues. Members added between 1 December and 31 March will be billed for half-year dues. Members added 1 April through 31 May will be billed for the upcoming year under the Add Your Voice Membership Campaign.
- Only add <u>new</u> members on Step 1. You will be able to renew, resign, reinstate and pay dues in the next steps.
- 12. To add new members, resign members, and/or pay dues, read the instructions on the webpage and begin at "Step 1: Add New Members" if your club is adding a new member(s). If your club is not adding new members, skip Step 1 by clicking on the **Next Step** button.
- 13. To add a **new** member, click on the **Add Now** button under the category of the new member that you want to add.
  - "Classified Member" is for all regular memberships.
  - "Club Honorary Member" is for memberships that are paid for by the club, not the member.
  - "Young Professional Member" is a lower dues rate category for members 35 years old or younger, which will require their birthdate to verify.
  - ➤ If you are not adding new members, click the **Next Step** button.

If you are not adding new members, skip Step 1 and click the "Next Step" button.

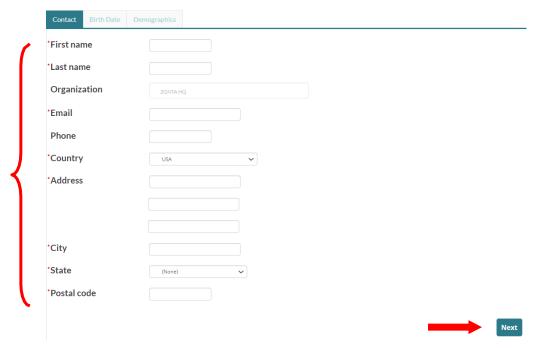




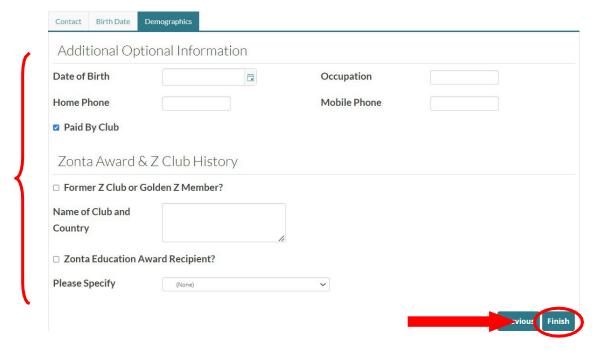




Enter the new member's information and then click on the Next button.



- On the "Birth Date" tab, enter the member's birth year. The birth year is not saved and is only requested to ensure the correct dues rate. When finished, click the **Next** button.
- ➤ On the "Demographics" tab, add in the additional optional information. Date of birth is required for young professionals to ensure their yearly dues rate is correct.
- Check the Former Z Club or Golden Z Club Member box if the new member was ever a member of a Z or Golden Z club. Check the Zonta Education Award Recipient box if the new member ever received an educational award from Zonta. Click on the dropdown arrow to select the award received.



After you click on the **Finish** button, you will be redirected back to the "Step 1: Add New Members" page. Repeat the steps for adding new members until all new members have been added.

- 14. Once all new members have been added, click on the **Next Step** button to go to the "Step 2: Update Membership Status" page.
  - Check the box in the Join/Renew column (to the right of each member's name) for each new or continuing member.
  - If a member is resigning, check the box under the **Resign** column.
  - After all selections have been made, click on the Next button.

Step 2: Update Membership Status

Check the box next to each new member you added and for each renewing member under the "Join/Renew" column. If all members paid their renewal dues, they will not be listed.

If the member is resigning, check the box next to the member's name under the "Resign" column.

You will have the option on the final check-out page to select which members you wish to pay now or pay later.

Once all selections are made, click the "Next" button.

Note: All members will appear on the invoice unless they are paid or marked resigned.





15. On the "Step 3: Reinstate Members" page, check the box to the right of each former member's name that you would like to reinstate. Please note that for members who are reinstating after more than three years of absence, their record will have been purged and they will be considered a new member.

Step 3: Reinstate Members

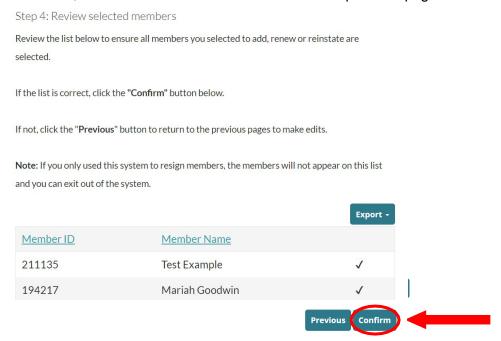
For each former member listed below, check the box under the "Reinstate" column if the member is reinstating their membership. If you are not reinstating members, skip Step 3 and click the "Next" button.

Former Member ID	Former Member Name	<u>Reinstate</u>
208659	Betty Jones	
204735	Phyllis Test	
200919	ZI Board Test	
200923	ZI Dist Treas Test	
200918	ZI ICC Test	
200924	ZI Lt Gov Test	
200922	ZI Mem Comm Test	
200921	ZIF Dev Comm Test	



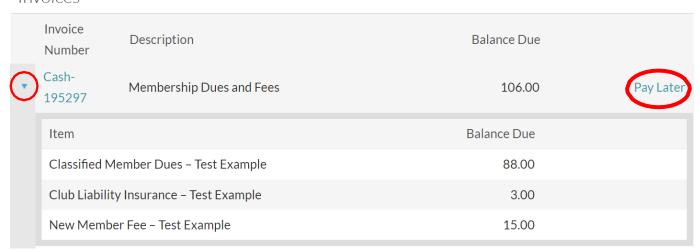
If no one is reinstating, or when your selections are complete, click on the **Next** button.

- 16. On the "Step 4: Review Selected Members" page, review the list to ensure that all the members you added, renewed, and/or reinstated are listed.
  - If the list is correct, click the **Confirm** button.
  - If the list is incorrect, click the **Previous** button to return to the previous pages and make changes.



- 17. After you click the **Confirm** button, you will see the "Membership Dues and Fees Billing Summary" page.
  - Review the invoice amounts and each member listed. Invoices are grouped by returning/renewing member dues, new member dues and fees, and reinstating member dues and fees separately.
  - You can view the individuals billed under each invoice by clicking on the triangle dropdown next to the invoice number. To pay an invoice later, click on the "Pay Later" link to the right of the balance due.

#### Invoices



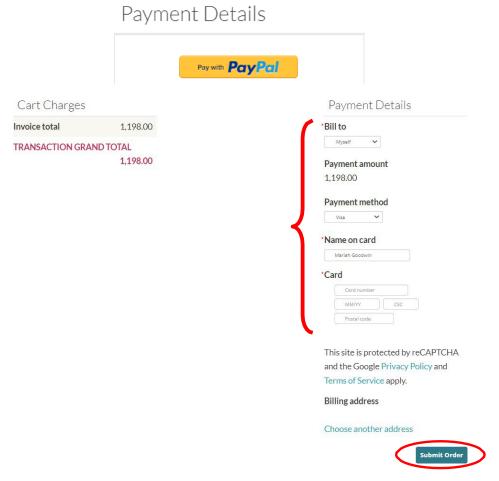
If any of the billing information is incorrect, click the **Click Here to Make Billing Changes** button. If it is correct, scroll down to enter payment information and click the **Submit Order** button when finished.

- > To pay with a check or wire transfer, click on the **View Invoice (Form A)** button to download a PDF invoice. The invoice includes instructions on how to submit each type of payment.
- ➢ Be sure to send the Membership Department a copy of Form A. Include only the members to be <u>PAID</u>. All changes should be completed before submitting the form.

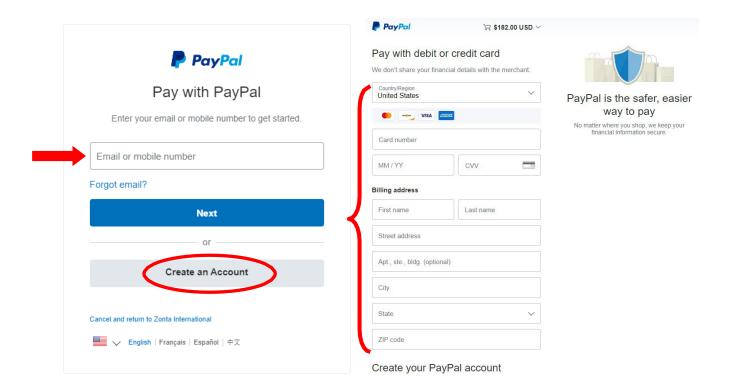
# Membership Dues and Fees Billing Summary



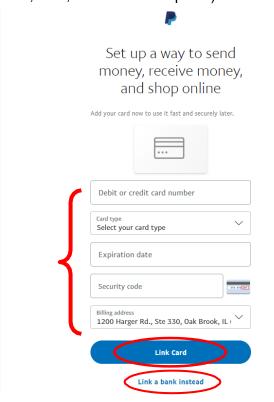
18. To pay online, either enter the credit card information under "Payment Details" and then click the **Submit Order** button or click the Pay by PayPal button to be redirected to your PayPal account.



Please be sure that the billing address matches that of the credit card to complete payment.



➢ If you selected to Pay by PayPal, either log in or create an account. Once you have clicked the Create an Account button, you have the option to link a credit card (MasterCard, Discover, Visa, or American Express) or bank account.



- 19. Once your payment is completed, you will be redirected back to the Zonta page to confirm. You may print the order confirmation page for your records. You will receive a copy of the receipt via email.
- 20. You are finished! Thank you for your support. We appreciate your hard work and dedication to Zonta International.