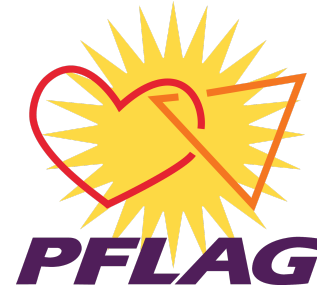


# Chapter Hub Cheat Sheet



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## Log In

(Logging in for the first time? Email Brooke Smith ([bsmith@pflag.org](mailto:bsmith@pflag.org)) for a welcome email)

- Go to [pflag.org/chapterhub](http://pflag.org/chapterhub)
- Enter username and password > click login button

## Update Chapter Information for Website

- Go to Organization/Household tab
- Find View “PFLAG Chapters” dropdown
- Click Go button
- Click your chapter name to open your chapter record
- Click Edit button
- Update your chapter contact information
- Update physical address. The address information that syncs to the map on the Find a Chapter section on [pflag.org](http://pflag.org) comes from these fields. If the information does not appear on a Google map, it will not appear correctly on the website and the search function will be skewed.
- Click Save (Note: your updates sync to the website within about 3 hours)

## Add Chapter Meeting and Event Info to the Website

- Click Campaigns tab
- Click New
- Enter fields applicable to your meeting or event
  - Campaign Name = name of meeting or event (required)
  - Description = brief description of your event (250 word limit)
  - Type of Meeting/Event = predetermined options to help you categorize your meeting or event
  - Start Date/Time = use this field to mark the beginning time
  - End Date/Time = use this field to mark the ending time (when the event is complete, the information will be automatically removed from the website)

- Location = name of the location (for example, Springfield Downtown Library)
- Address = street address (needed for Google maps to load correctly)
- City = city (needed for Google maps to load correctly)
- State = must be state abbreviation (needed for Google maps to load correctly)
- Zip Code = zip code (needed for Google maps to load correctly)
- Event Contact Name = best person to answer questions
- Event Contact Email = corresponding email to contact name
- Event Contact Phone = corresponding phone to contact name
- Save (Note: your meeting information will sync automatically to the website within 3 hours)

### Update Chapter Members from Lapsed or Former to Current

- Go to Organizations/Households tab
- Click on your chapter record (if you don't see it, click the dropdown, find PFLAG Chapters, click go, click on your chapter name)
- Scroll on chapter record to Affiliated Contacts
- Find member's name in list
- Click "Edit"
- Change status to "Current"
- Click "Save"

### Add New Chapter Member

- Click on Individuals tab
- Click "New" button
- Choose Chapter Member as Record Type of New Record
- Click Continue
- Enter First Name, Last Name, Phone, Email, Mailing Address
- Leave Organization/Household Name blank (it will autofill when you save)
- Leave Primary Affiliation blank

- Click Save
- Scroll to Organizational Affiliations section
- Click New Organization Affiliation
- Choose Membership as Record Type of New Record
- Click Lookup Icon (looks like a magnifying glass)
- Enter Chapter Name
- Click Go button
- Click Chapter Name (ex. PFLAG Greensburg)
- Choose Current in Status dropdown
- Click Primary
- Click Save button

### Add New Household Member

- Click on New in the Individual tab
- Choose Chapter Member as Record Type of New Record
- Click Continue
- Enter First Name, Last Name, Phone, Email, Mailing Address
- Click Lookup Icon next to the Organization/Household name
- Enter name of the existing household member in the search field
- Click Go!
- Click on name of existing household member
- Leave Primary Affiliation blank
- Click Save
- Scroll to Organizational Affiliations section
- Click New Organization Affiliation
- Choose Membership as Record Type of New Record
- Click Lookup Icon (looks like a magnifying glass)
- Enter Chapter Name
- Click Go button
- Click Chapter Name (ex. PFLAG Greensburg)

- Choose Current in Status dropdown
- Click Primary
- Click Save button

### **Update Chapter Member Contact Info**

- Go to Individuals tab
- Choose “My Chapter Individuals-All” in dropdown
- Click Go button
- Find Individual
- Click Edit
- Update information
- Click Save

### **See Info By Chapter Board - current and former**

- Go to Organization/Household tab
- View “PFLAG Chapter Boards” in drop-down > Click Go
- Choose a chapter to view by clicking on the name of your chapter board
- Scroll to Affiliated Contacts
- Click on a board member’s name to find contact information

### **Update Chapter Board members**

- Go to Organizations/Households tab
- View “PFLAG Chapter Boards” in dropdown
- Click Go button
- Click PFLAG <chapter name> Board
- Scroll to Affiliated Contacts
- Make a current board member a former board member (please do not delete former board members)
  - Find board member
  - Click Edit

- Choose Former in Status dropdown
- Choose date
- Click Save
- Add a new chapter board member
  - Note: the Individual should already be added (see information above on adding a new member)
  - On the Chapter Board record, Click New Organization Affiliation
  - Choose Board as Record Type of New Record
  - Click Lookup Icon (looks like a magnifying glass)
  - Enter Individual's Name
  - Click Go button
  - Click Individual's Name
  - Choose Position in dropdown
  - Enter Start Date
  - Click Save

## Pay Chapter Dues

- Go to Organizations/Household tab
- Click on your chapter record
- Click on "Pay Chapter Dues"
- Enter in the amount you're paying (\$15 x number of households)
- Enter in your billing and credit card information
- Click the Process button to complete