Membership: Navigating Group Tally



NAVIGATING Group Tally

2019 ALTRUSA INTERNATIONAL CONVENTION, RENO, NEVADA





What we will be discussing:



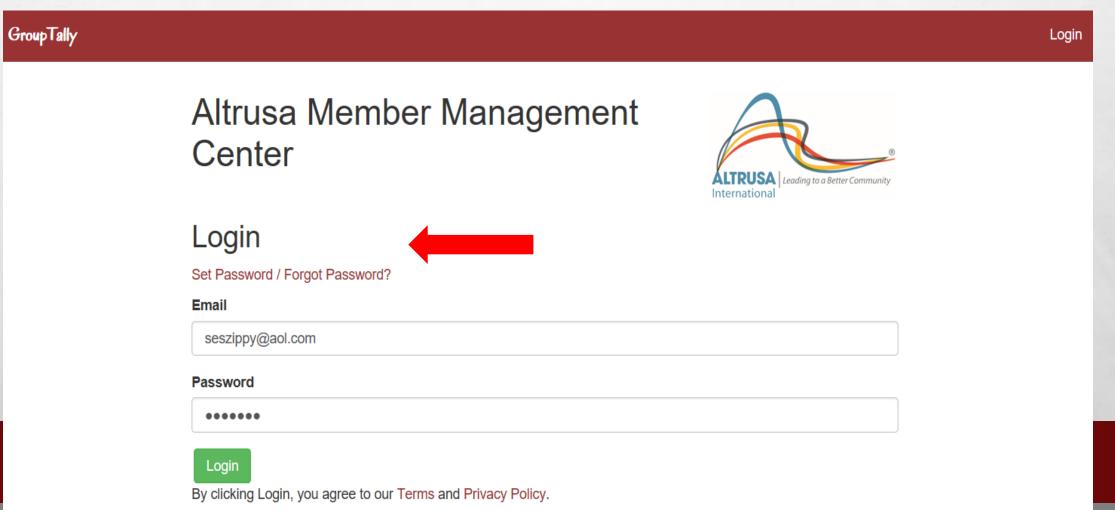
- ✓ HOW TO LOGIN
- ✓ UPDATING CLUB OFFICERS
- **✓ UPDATING MEMBERSHIP ROSTERS**
- ✓ PAYMENT METHODS
- ✓ MAKING A PAYMENT



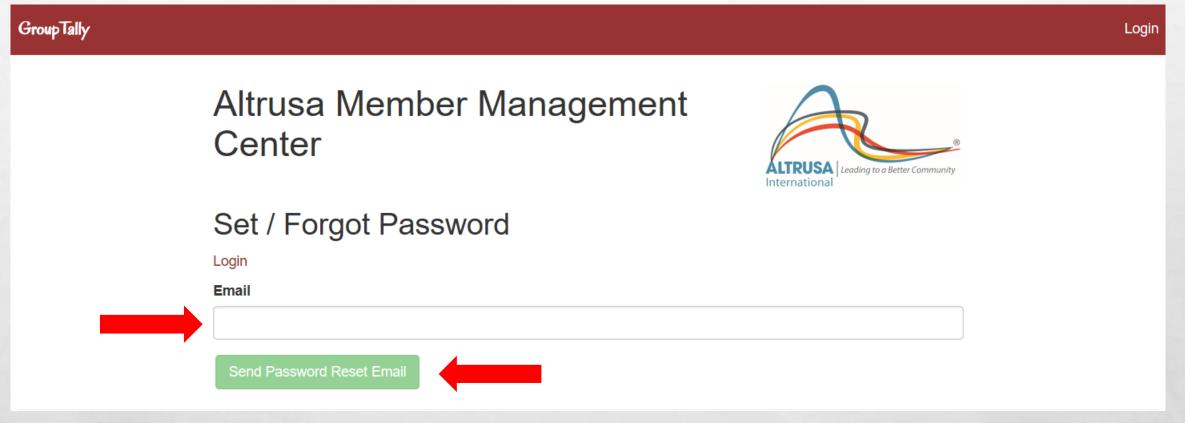


Group Tally Login

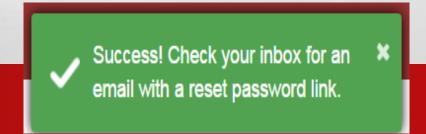
Go to https://altrusa.grouptally.com. The Membership Management Center (MMC) is run by Group Tally. Logging in for the first time, Click "Set Password/Forgot Password?" link under the word Login



Enter your email address then click on the Send Password Reset Email button



You will see this message pictured below briefly at the top of your screen, follow email instructions

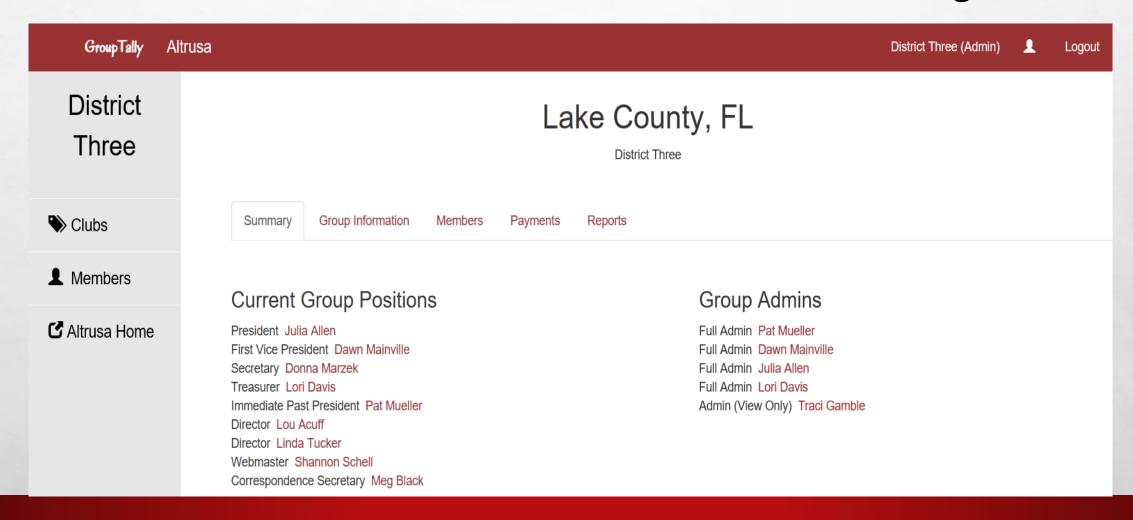


International Website click "Member Login" or "Sites" dropdown to go to Group Tally if you have saved your GT credentials on your computer login will be seamless



Altrusa International

Now you have successfully logged in to the MMC. You will be on your Club Page. A District Treasurer will be directed to their District Home Page.



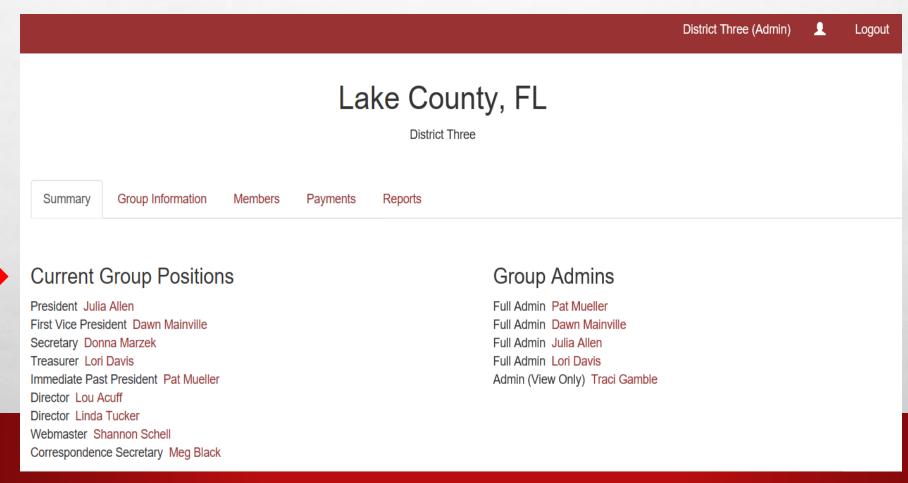
Any Questions or Difficulties contact altrusa.org or call (312)427-4410



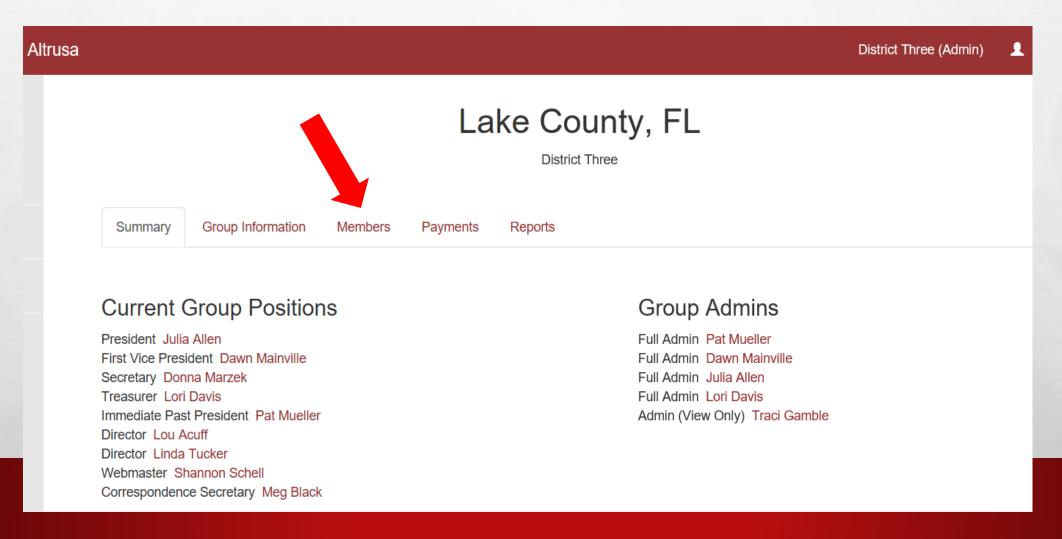


Updating Club Officers

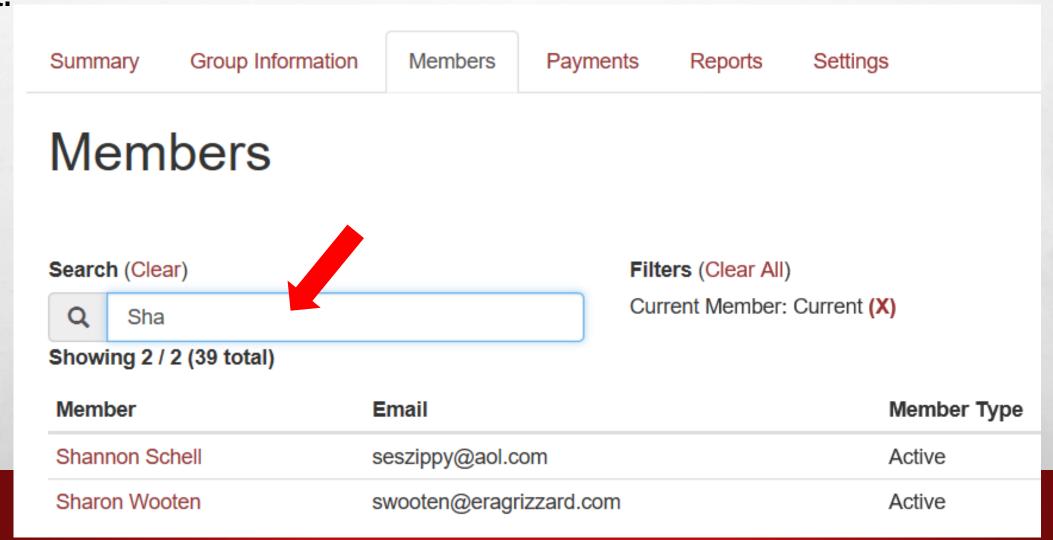
Once you have logged in, you will be on your Club Page. You will see your "Club Name" and "Current Group Positions" reflecting your club's roster of officers.



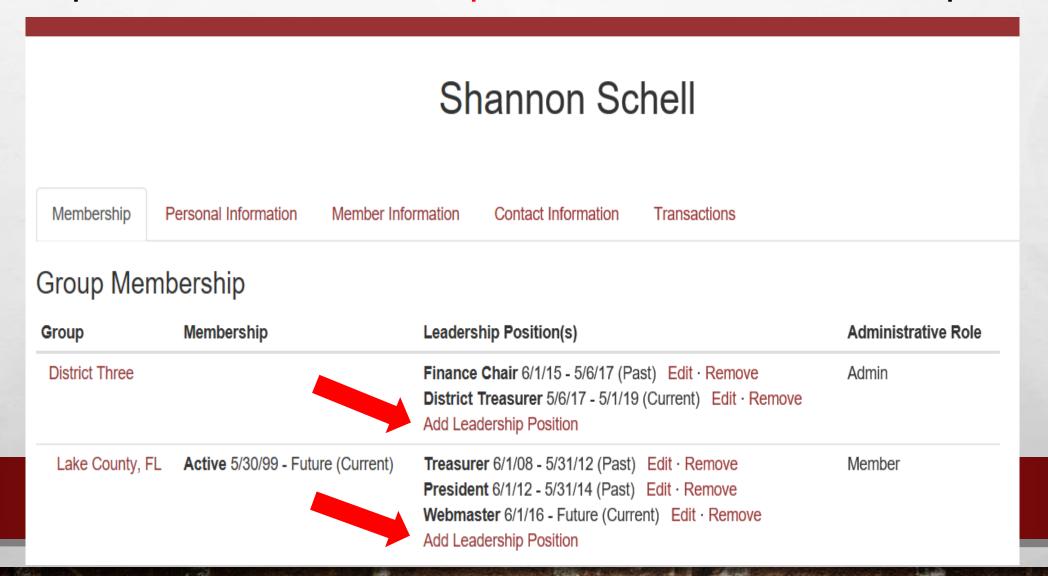
The first step is to find the member which you are going to assign or change a leadership position. They may already be listed on the main page, or you may need to search on the Members tab to find them.



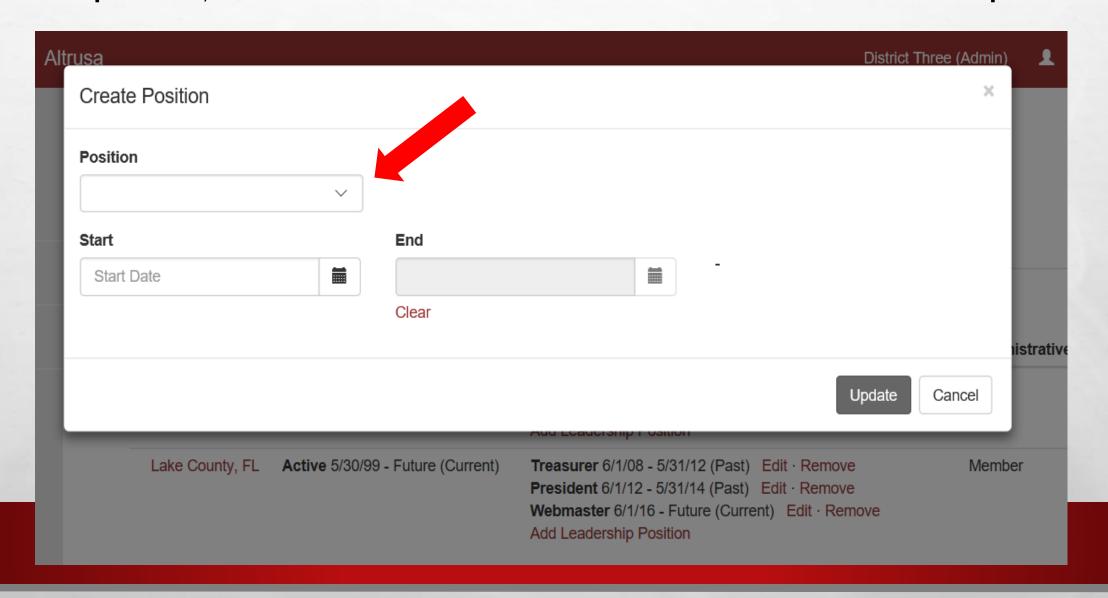
Begin typing the member's name in the search bar and the results will automatically filter others out. Once you see the name of the member you were searching for, click on it.



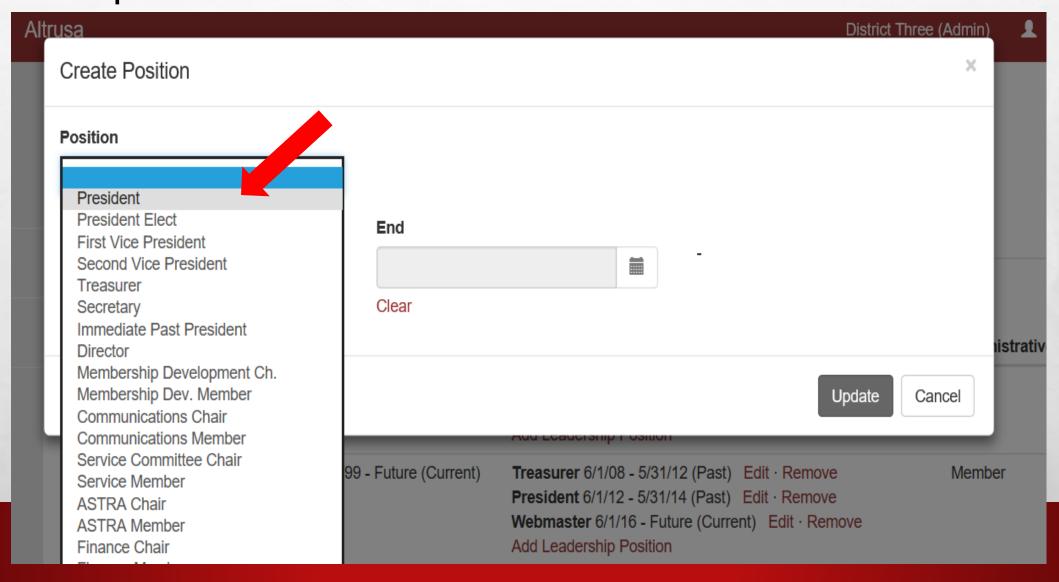
Clicking name or searching the name, the member's page will come up. Showing the district and club the member is a part of, also the dates and positions assigned past and present. Click Add Leadership Position link to create additional positions.



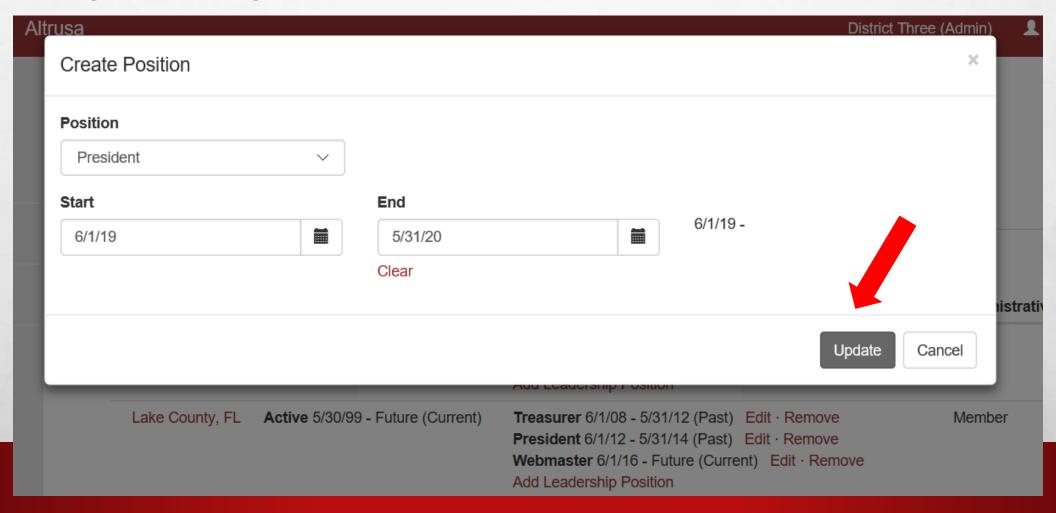
The dialogue box will appear on your screen. Click on the Position drop down to select a position, and then enter the dates that the member will hold that position.



For example, to label a member the President of the club, simply select "President" from the drop menu and fill in the start and end dates of the term.



Once you click Update, your newly assigned position will appear under the Leadership Position(s) heading. If it does not appear instantly, please refresh the page or log out and log back in, please do not repeat the process multiple times.



See below, the new position of "President" is listed under Leadership Position(s) for the Club. If you have assigned a position in error, you can edit or simply click on the "Remove" link next to that position to remove it.

Membership	Personal Information	Member Information	Contact Information	Transactions			
Group Membership							
Group	Membership	Leaders	hip Position(s)		Administrative Role		
District Three		District '	Chair 6/1/15 - 5/6/17 (P Treasurer 5/6/17 - 5/1/19 dership Position	ast) Edit · Remove 9 (Current) Edit · Remove	Admin		
Lake County, F	L Active 5/30/99 - Futo	Presider Webmas Presider	er 6/1/08 - 5/31/12 (Past) nt 6/1/12 - 5/31/14 (Past) ster 6/1/16 - Future (Curr nt 6/1/19 - 5/31/20 (Futur dership Position	Edit · Remove	Member		

To the right of the Leadership Position(s) there is the Administrative Role heading. Click on "Edit" next to the current Role to assign a new role. The pop-up window will break down what abilities each level has available to them.

Personal Information Contact Information Membership Member Information Transactions Group Membership Membership Administrative Role Leadership Position(s) Group Finance Chair 6/1/15 - 5/6/17 (Past) Edit · Remove District Three Full Admin Edit District Treasurer 5/6/17 - 5/1/19 (Current) Edit · Remove Add Leadership Position Member Edit Lake County, FL Active 5/30/99 - Future (Current) **Treasurer** 6/1/08 - 5/31/12 (Past) **Edit** · **Remove** President 6/1/12 - 5/31/14 (Past) Edit · Remove Webmaster 6/1/16 - Future (Current) Edit · Remove Add Leadership Position

Group Pages (for current group and all sub groups)

,	Administrative Role	Summary	Info	Members	Settings	Payments
•	Full Admin	~	~	~	~	~
0	Admin	~	v	~	~	~
0	Admin (View Only)	(((((
0	Member	<u></u>	<u></u>	<u></u>	<u> </u>	<u> </u>

~ =	Can	Edit	and	View
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= Can Only View

□ = Cannot Edit or View

Other User's Pages (within current group and all sub groups)

Role Type		Personal Info	Contact Info	Membership Type	Group Position	Member Info	Payment History	Administrative Role
•	Full Admin	~	~	~	~	~	~	~
0	Admin	~	~	~	~	~	~	(
0	Admin (View Only)	•	(•	•	•	•	•
0	Member	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	a

ON THE POP-UP WINDOW, SELECT THE ROLE YOU WISH TO ASSIGN TO THE MEMBER AND THEN CLICK THE UPDATE BUTTON.





Cancel

Use the "EDIT" link to adjust roles that already exist. If member's term has no end date, or needs to be adjusted, use the edit feature instead of removing a position.

Membership	Personal Information	Member Information	Contact Information	Transactions	
Group Mei	mbership				
Group	Membership	Leaders	hip Position(s)		Administrative Role
District Three		District	Chair 6/1/15 - 5/6/17 (Pa Treasurer 5/6/17 - 5/1/19 dership Position	ast) Edit · Remove 9 (Current) Edit · Remove	Full Admin Edit e
Lake County, F	L Active 5/30/99 - Futo	Presider Webmas	er 6/1/08 - 5/31/12 (Past) nt 6/1/12 - 5/31/14 (Past) ster 6/1/16 - Future (Curr dership Position	Edit · Remove	Member Edit

We would like past roles to remain listed to keep a record of positions member held.



UPDATING MEMBERSHIP ROSTERS

From the main club page choose "Members"

Lake County, FL

District Three

Gro

Group Information

Members

Payments

Reports

Current Group Positions

President Julia Allen

Summary

First Vice President Dawn Mainville

Secretary Donna Marzek

Treasurer Lori Davis

Immediate Past President Pat Mueller

Director Lou Acuff

Director Linda Tucker

Webmaster Shannon Schell

Correspondence Secretary Meg Black

Group Admins

Full Admin Pat Mueller

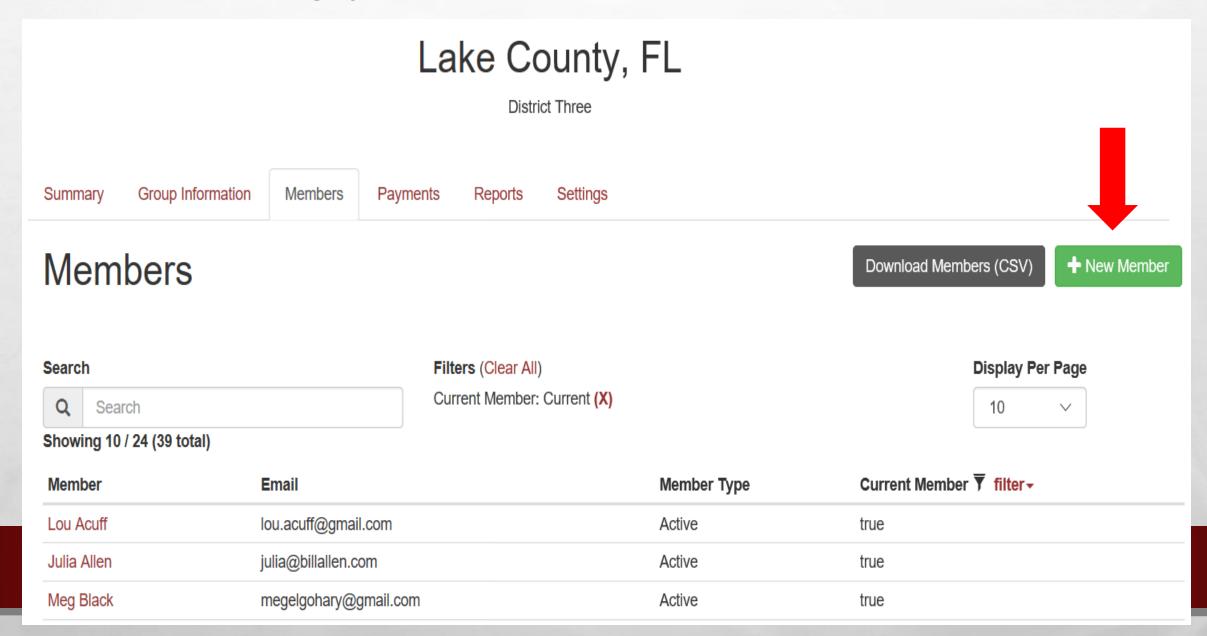
Full Admin Dawn Mainville

Full Admin Julia Allen

Full Admin Lori Davis

Admin (View Only) Traci Gamble

From Members page you can ADD a New Member, click on +New Member



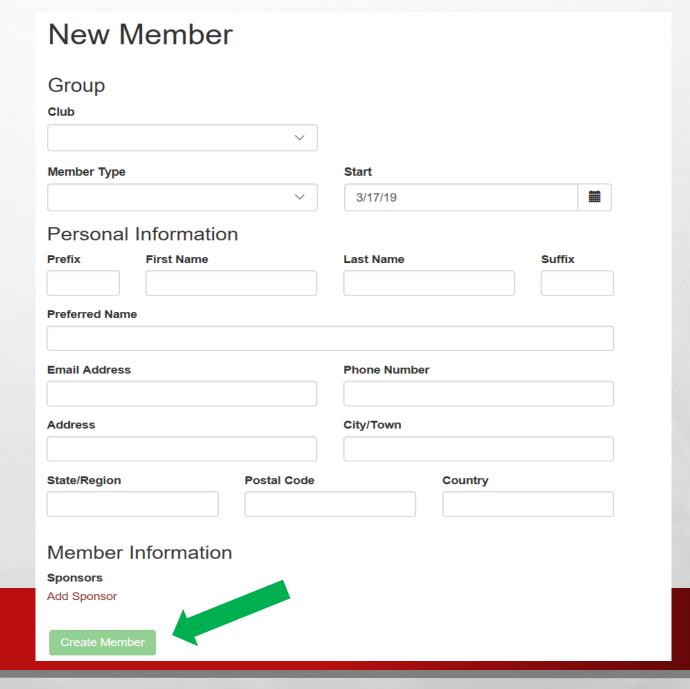
Simply fill in the form...

Apply your club name

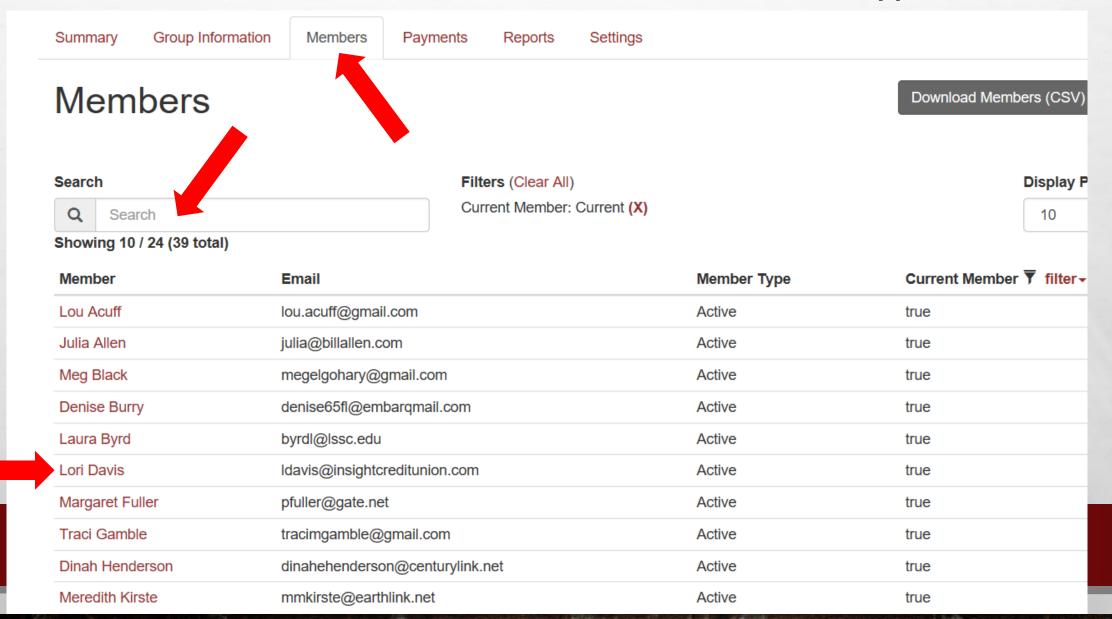
The drop-down choices for Member Type are Active and Affiliate

Please don't forget to click on Add Sponsor and input name

Finish by clicking Create Member



To locate an existing member: Click on Members Tab, for a listing of each member then click on it, or use the Search Bar and click on the name as it appears.



From the members page you can update Personal Information, Member Information, Contact Information and see Transactions of Dues and Fees.



Group Membership

Mark Member Inactive

Group	Membership	Leadership Position(s)	Administrative Role
District Three		Finance Chair 6/1/15 - 5/6/17 (Past) Edit · Remove District Treasurer 5/6/17 - 5/1/19 (Current) Edit · Remove Add Leadership Position	Full Admin Edit
Lake County, FL	Active 5/30/99 - Future (Current)	Treasurer 6/1/08 - 5/31/12 (Past) Edit · Remove President 6/1/12 - 5/31/14 (Past) Edit · Remove Webmaster 6/1/16 - Future (Current) Edit · Remove Add Leadership Position	Full Admin Edit

GroupTally

Altrusa

District Three (Full Admin) ▼

1

District

Three



Members

☑ Altrusa Home

Shannon Schell

Membership

ip Personal Information

Member Information

Contact Information

Transactions

Personal Information

Edit

Prefix:

First Name: Shannon

Preferred Name:

Middle Name: Elizabeth

Last Name: Schell

Suffix:

Gender: Female

Birth Day: July 30

District

Three



Members

C Altrusa Home

Shannon Schell

Membership

Personal Information

Member Information

Contact Information

Transactions

Member Information

Edit Member Information

Member ID: 32557

Sponsors:

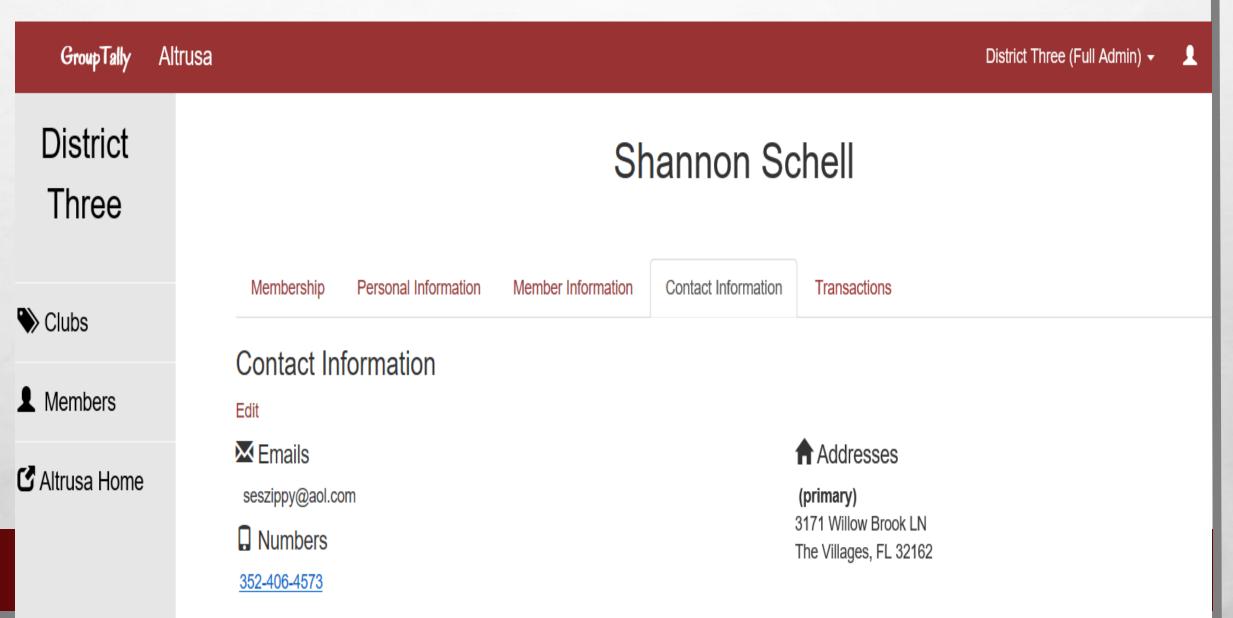
Club 21 Member: true

Club 21 Join Date: 8-1-17

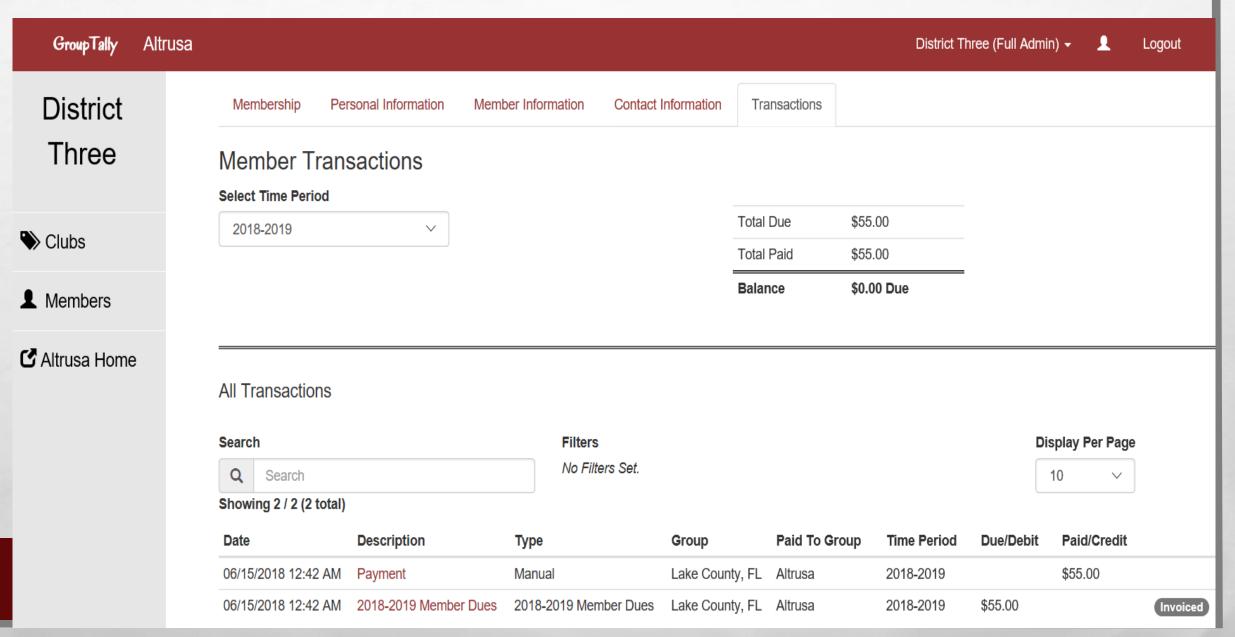
Occupation: Other

Employer: Self-Employed

The Contact Information page:



The Transactions page:





4

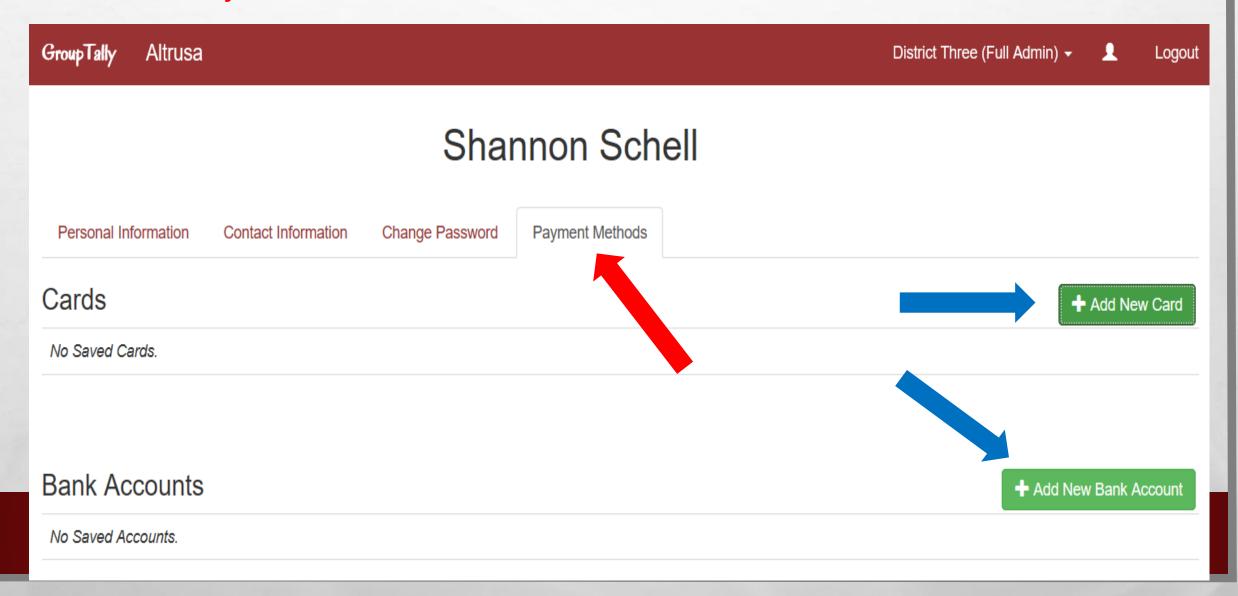
Payment Methods

There are several ways to make a payment using Group Tally. Link your bank account and transfer funds directly, Link your credit card, or Mail a check (mailing a check requires you to submit an "offline" payment).

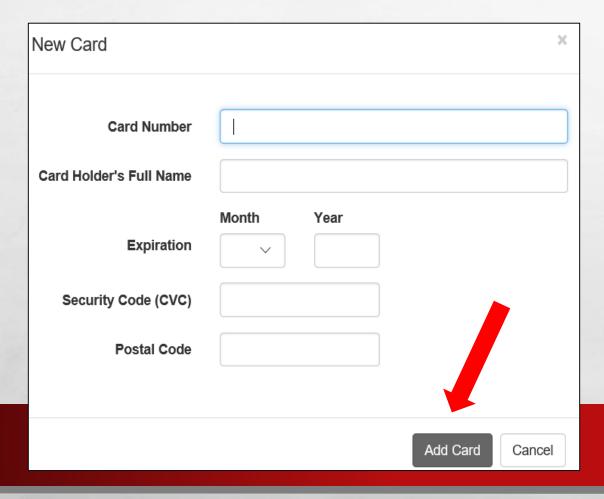
To link a bank account or credit card, first as Treasurer go to YOUR member page, click on the silhouette in the upper right corner of the page, within the red bar.

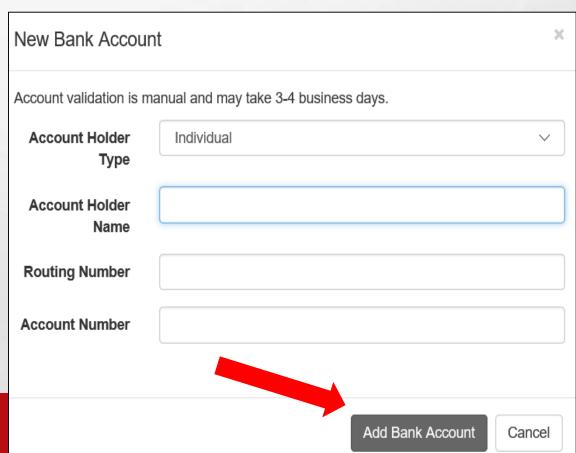


You will then see a page with your name at the top, and a few tabs will be available. Choose the Payment Methods tab. Then click "Add Card" or "Add Bank Account"



On this page, you will see any payment methods previously entered, or it may be blank. To link a credit card to the account, click on + Add New Card, or to link a bank account, click on + Add New Bank Account. If paying by check you can skip this step. For each of these options, a dialogue box will appear for you to fill out.





Should you choose to add a bank account, fill out the form and click the Add Bank Account button. Once the form is accepted, you must wait until you get 2 small transactions posted to your account. These transactions are always deposits in the form of small change (less than a dollar). This may take a few business days. Once you see the transactions in your account, you must return to the Payment Methods page to confirm your account. Do this by entering the amounts of the confirmation transactions.

Please contact the International Office should you encounter any problems or have any questions; they are more than happy to assist you.

altrusa@altrusa.org or call (312)427-4410



Making a Payment

Altrusa

Lake County, FL

District Three

Summary Group Information Members Payments Reports

Current Group Positions

President Julia Allen
First Vice President Dawn Mainville
Secretary Donna Marzek
Treasurer Lori Davis

Immediate Past President Pat Mueller

Director Lou Acuff
Director Linda Tucker

Webmaster Shannon Schell

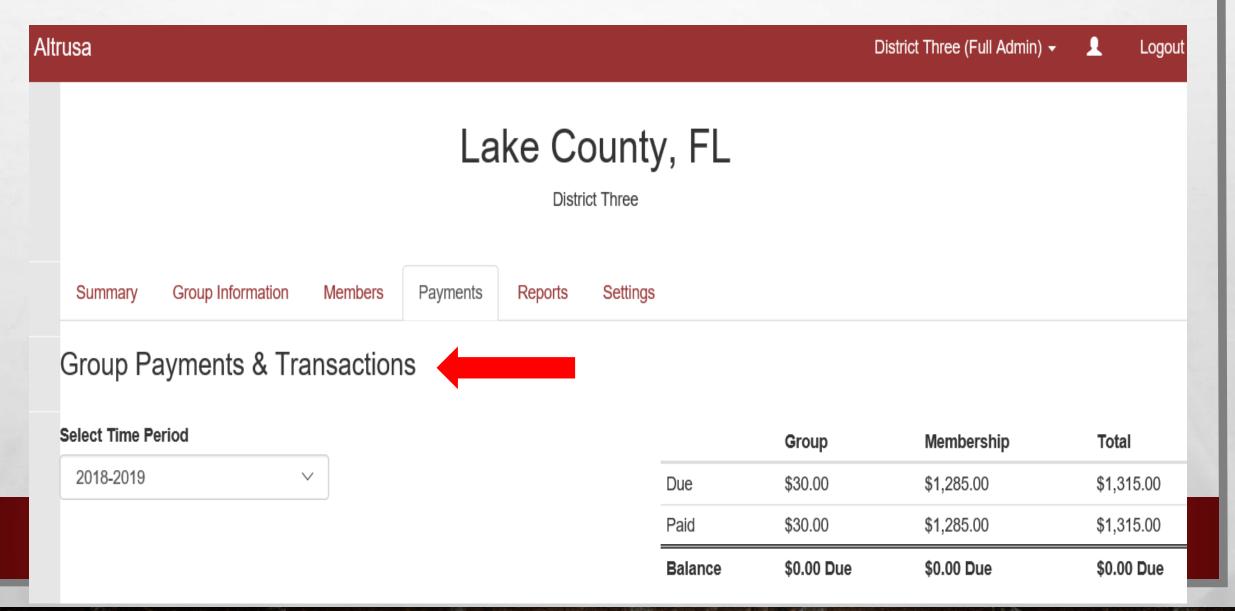
Correspondence Secretary Meg Black

Group Admins

Full Admin Pat Mueller
Full Admin Dawn Mainville
Full Admin Julia Allen
Full Admin Lori Davis
Admin (View Only) Traci Gamble

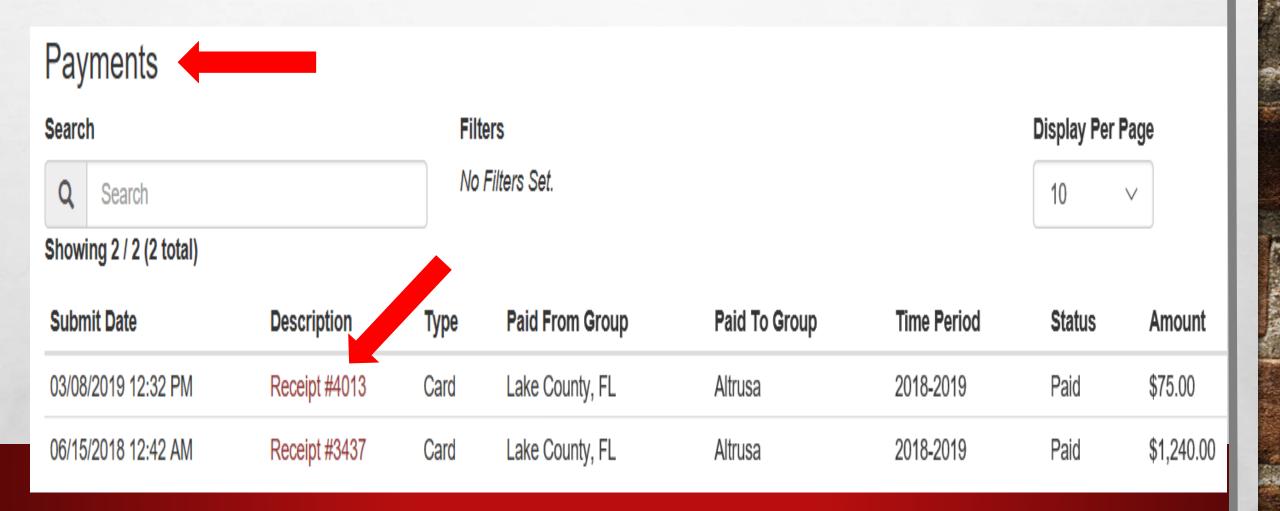
On the Club Page click on the Payments Tab

The Payments page is divided into four sections. 1. Group Payments

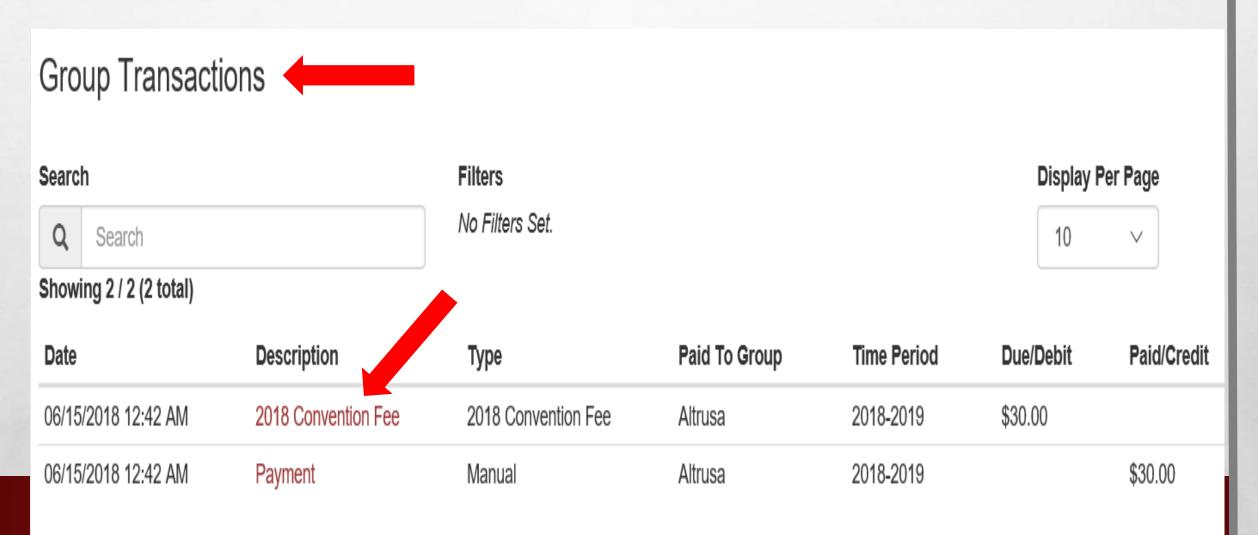


2. Payments where you'll find receipts for payments made during the current cycle.

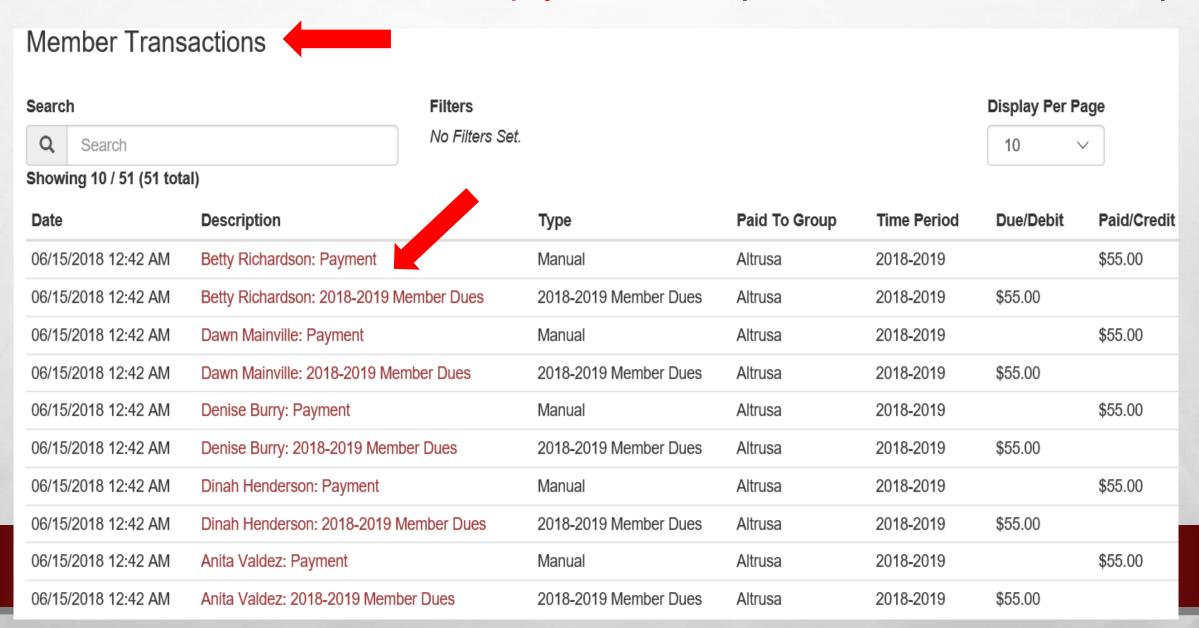
Click on any Receipt to see or print the details of the transaction.



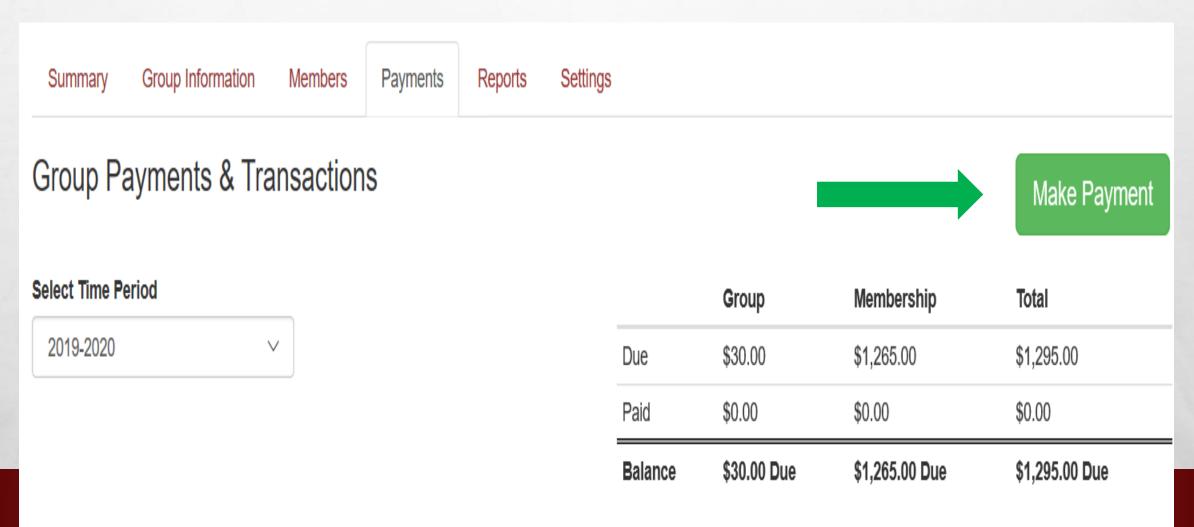
3. Group Transactions where you'll find the Convention fee, and any other fees. Click on any Fee or Payment to see or print the details of the transaction.



4. Member Transactions shows each payment, due or paid, for the entire membership.

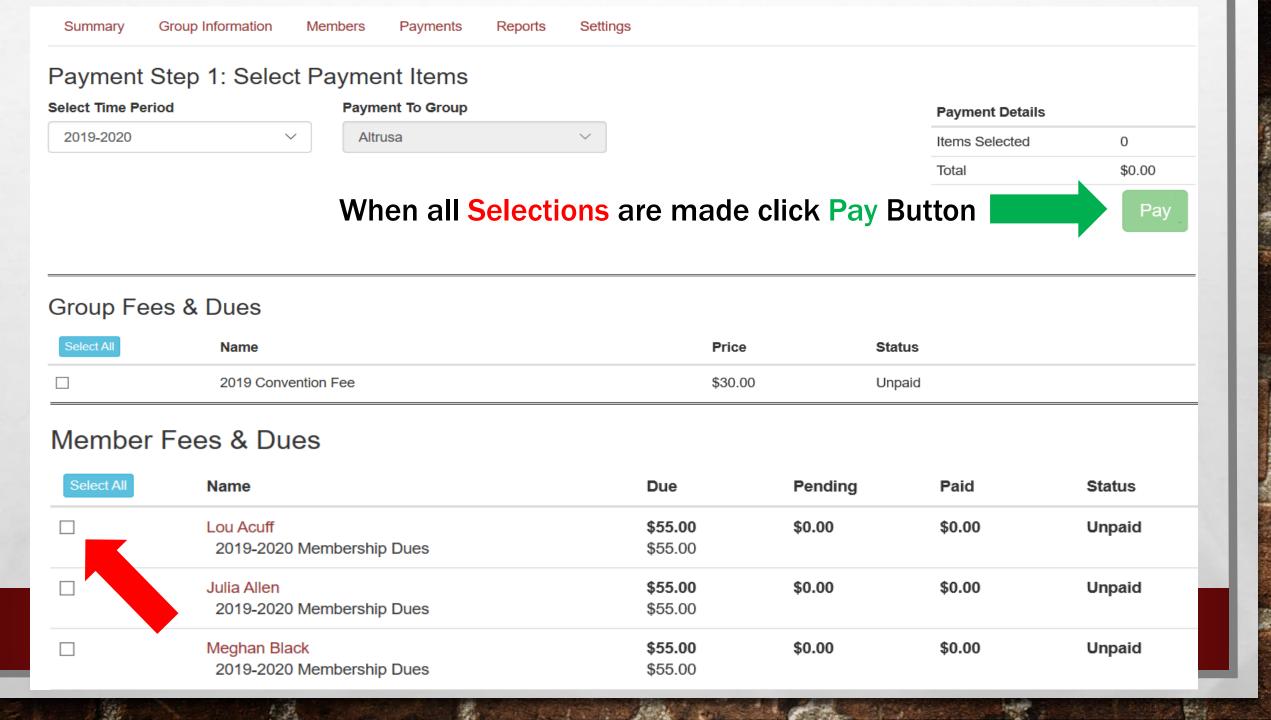


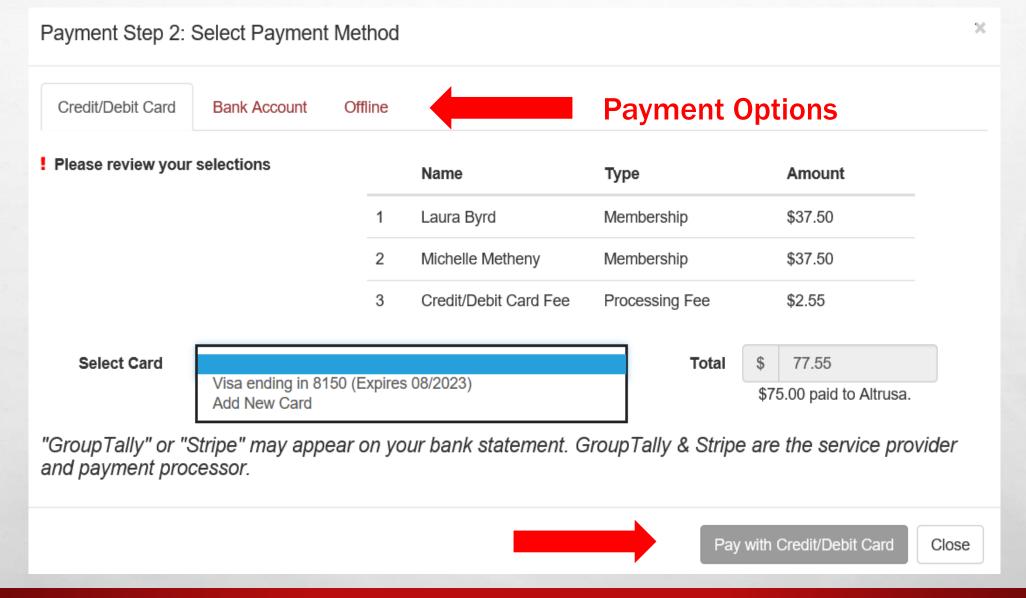
Back to the Group Payment Summary at top of payments page, if you have a balance, the Make Payment button will be available to you. Click on it to proceed.



On payments page you will find a list of dues, those with green check marks have been paid, and the open check boxes are unpaid and available for selection.

Member Fees & Dues					
Select All	Name	Due	Pending	Paid	Status
	Anne Carroll 2019-2020 New Member Fee (Altrusa International District Three Virtual Club) 2019-2020 Membership Dues	\$65.00 \$10.00 \$55.00	\$0.00	\$0.00	Unpaid
	Caitlin McCaffrey 2019-2020 Membership Dues	\$55.00 \$55.00	\$0.00	\$0.00	Unpaid
	Christina Seifert 2019-2020 New Member Fee (Altrusa International District Three Virtual Club) 2019-2020 Membership Dues	\$0.00	\$0.00	\$65.00 \$10.00 \$55.00	Paid





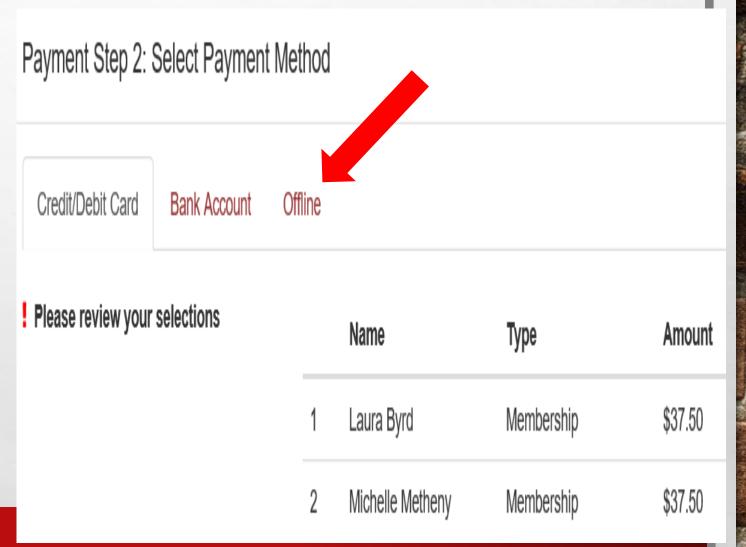
Select Credit/Debit Card, Bank Account or Offline Here I have chosen Credit Card so I click on "Pay with Card"

Selecting Offline Payment

If you pay with a check, please select the Offline Tab. This allows you to "submit" your intended payment and will give you a receipt number to track your payment.

Print list of members you are paying to send with your check.

Note: Offline payments need to be approved. Until then, payment status is displayed as "Submitted - Pending Approval". Once the International Office receives your payment, it will be approved.





Designed by: Shannon Schell, International Membership Committee 2019-2021



FOR YOUR SERVICE TO ALTRUSA