**Instructions to Add a NEW MEMBER from a Printed Application
Via Online Signup at ohconline.com**

(Revised 4/8/2019 rev 3)

Document owner: Membership chair
Contact info: membership@ohconline.com or go to 'Contact Us' to find current committee chair phone number.

Discussion:

Use this procedure when you have received a printed membership application for a new member along with a check or cash payment.

First, you should check to make sure that the membership really is new. We've seen several cases where a member checked the "New Membership" box, because they had not renewed their OHC membership in several years. It's likely that the previous membership is still in the database. As a Chapter Treasurer or Chapter Membership Chair, you have permission to search all the membership database by using the "All Users" search feature.

Search the database to see if the new member had a previous membership account.

1) Log into your membership account and go to your dashboard (by clicking the Manage Members icon)
2) Select "Users", then "All Users" from the menu in the left margin.
3) Enter the Last Name or the First and Last Name or the email address of the member you are searching for in the "Search Users" box.
4) If the next screen says "No users found" then you have confirmed that the person does not have a previous membership account and you can enter a new membership account.

Note on Searching: The most effective search is an email address. If you don't have one, or it doesn't work, the next best thing is the last name only. If the last name is a common last name, like Smith or Jones, then you will have to enter the first and last name to narrow down the results. When you use a first name and last name combination, the system will search for the exact combination that you enter. You may need to search for variations of the first name. For
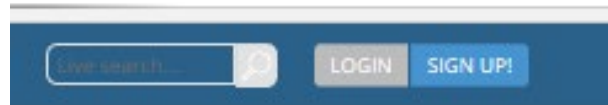
example: The new membership form says "Bob Jones". If you search for "Bob Jones" and don't find anything, try searching for "Robert Jones".
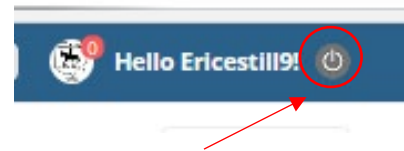
Add a New Member from a Printed Membership Form:

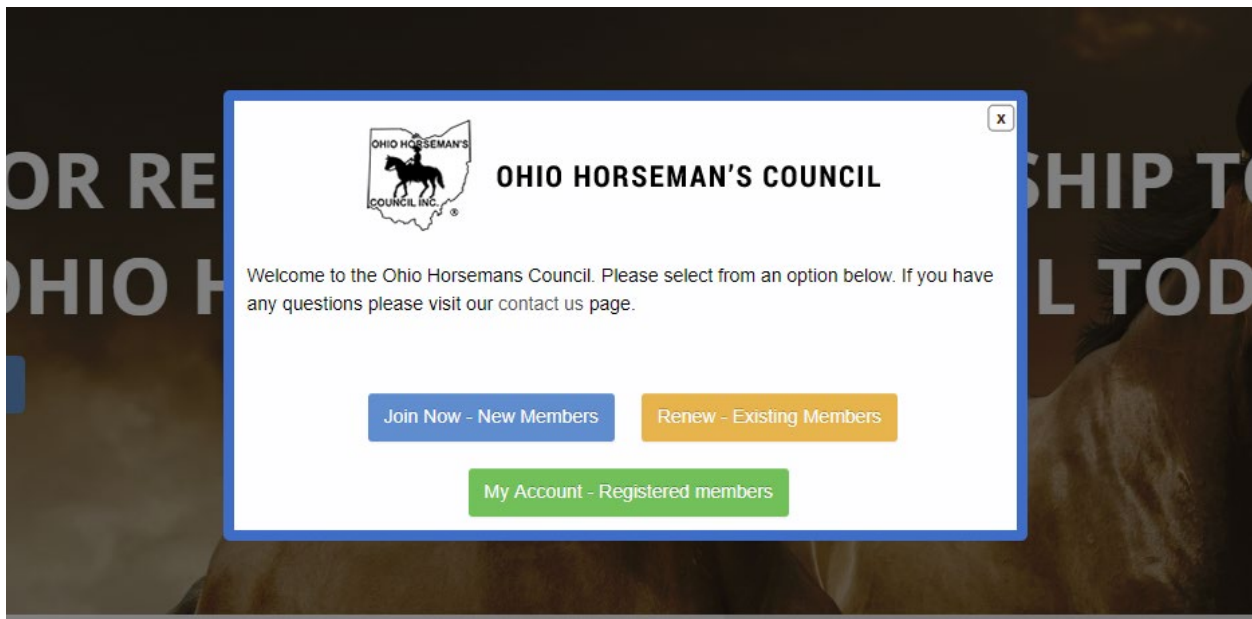1) Go to members.ohconline.com on your internet browser.

2) Make sure that you are not already logged in. The upper right corner should look like this:

    a. If the upper right looks like this:

    b. Click the power button to log-out.

3) Click the "Join Now - New Members" button in the blue box.

The next screen:

4) Complete the member's registration using the membership information from the printed membership application, through to the checkout page.

5) Create a username. A good practice is to use the email address up to the @ symbol. For example, if the email address is myemail@gmail.com, make the username "myemail". It's not a good practice to have punctuation marks in the Username. If the beginning of the email is something like "my_email_23"; get rid of the underscores and make the username myemail23.

6) Create a password. The member will create another password later, so make up a simple password.

7) Select the payment method "Pay by Check or Cash".

8) Click on "Submit and Check Out"

9) You will see the Membership Confirmation page. Go to the upper right corner and click the power button to log out.

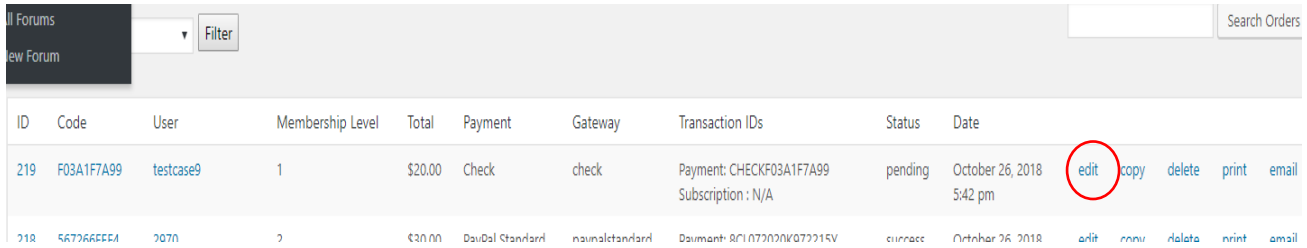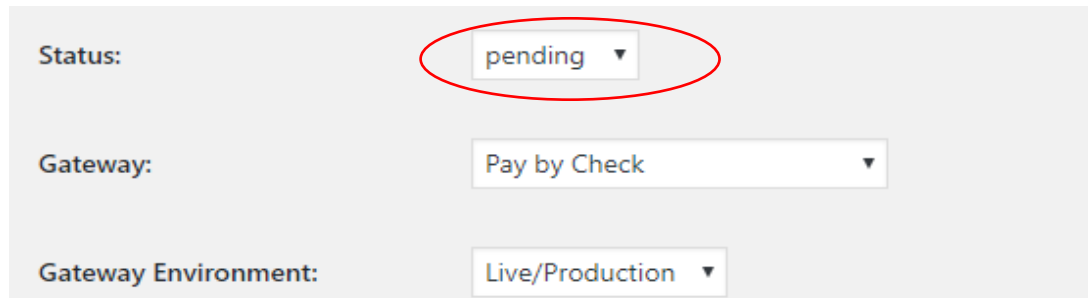10) Click on "My Account – Registered Members" (green box). Log in with your email address and password.

11) Go to your "Manage Members" page, if you are not already there.

12) Hover your mouse over the Memberships tab at the top or in the left margin. Click on "Orders" in the Memberships sub-menu.

13) You should spot the order near or at the top of the list.

ID	Code	User	Membership Level	Total	Payment	Gateway	Transaction IDs	Status	Date					
219	F03A1F7A99	testcase9	1	$20.00	Check	check	Payment: CHECKF03A1F7A99 Subscription : N/A	pending	October 26, 2018 5:42 pm	edit	copy	delete	print	email
218	567266FFFA	2070	2	$30.00	PayPal Standard	paypalstandard	Payment: 8CL072020K072215V	success	October 26, 2018	edit	copy	delete	print	email

Click the "edit" button on the right side of this order line.

14) Scroll down to the Status: line and change the drop-down box from "pending" to "success" after you have confirmed that the dues have been paid. This will change the membership from pending to active.

Status: pending ▼

Gateway: Pay by Check ▼

Gateway Environment: Live/Production ▼

15) You're finished.

Note: You don't have to enter each new member separately, then update the order for each one. You can enter a batch of new members, then log in and update the order status for all the members that you just added.

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