E-Membership Cards Made EASY

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Your presenters:

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Sue Woodworth-Bennett with son, Geoff, and husband, Martin
What is an e-Card?
E-Cards are NOT:

- Eliminating paper cards
- Passing along the printing to our units or members
E-Cards Provide an OPTION

2014-2015 Member Year

This card indicates that the person below is a member of:

National PTA
everychild.onevoice.*

PTA Unit ID:

Verification Code:

PTA Name:

Member Name:

Signature:

Create your profile at PTA.org/Profile
Questions? Call (800) 307-4PTA (4782)
Interested in e-Cards?

• *Contact your council or district if out-of-council.*
• CAPTA will provide:
  • Step-by-step e-Card Instructions
  • MembershipRoster.xls
    Prefilled with your unit’s name, number and a listing of **UNIQUE VERIFICATION CODES**
  • E-CardTemplate.doc
  • E-CardMerge.doc
• Technical support
How to PERSONALIZE e-Cards:

• Sending a single e-Card by email
• Sending a group of e-Cards by email
Generating and emailing a SINGLE e-Card:

- **ALWAYS** List the member’s name and email/contact information on the Excel spreadsheet provided by California State PTA.
Generating and emailing a SINGLE e-Card:

• Open the Microsoft Word file: “E-CardTemplate.doc”

• Type in your member’s name and unique verification code.
Generating and emailing a SINGLE e-Card:

• If you use **Microsoft Outlook**, from the file menu select “Save & Send”
• Choose “Save as a PDF”
• An email window will open with the e-Card attached. Enter the member’s email, a subject line and a message if you wish and click “Send”
Generating and emailing a SINGLE e-Card:

• If your computer is not configured for Outlook, from the “File” menu select “Save”
  • Choose “Save As”
  • Select a directory and folder (E-Membership Cards 14-15)
  • Change the file name adding the member’s name for ease of retrieval
  • Change the “File Type” to PDF
  • Click “Save”
  • Open your email program, list the member’s email address, enter a subject line, a message and attach the e-Card file.
Emailing a GROUP of e-Cards using Mail Merge:

• Save the Microsoft Excel file named: “MembershipRoster.xls” to your desktop
• Save the Microsoft Word file named: “E-CardMerge.doc” to your desktop
• Open the Excel file and add all members’ names and email addresses then save the file
• Open the Word file and click on “Mailings”
Select “Mailings”
Select “Start Mail Merge” and choose “Letters”
Select “Select Recipients” and choose “Use Existing List”
Click on “Desktop”
Locate your Membership Roster then click “Open”
Click “OK” to select the highlighted “Table”
Click on “Mailings” then on “Edit Recipient List”. Uncheck any blanks or names who will not be receiving emailed e-Cards and click on “OK”.

![Mail Merge Recipients window]

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

**Data Source**

- MembershipRoster.xls

**Refine recipient list**

- Sort...
- Filter...
- Find duplicates...
- Find recipient...
- Validate addresses...

**Data Source**

- MembershipRoster.xls

**Recipient details**

- Lee Mary marylee@gmail.com 1234 1000001 A
- Jones Tom Tjones@aol.com 1234 1000002 A
- Mouse Mickey mmouse@disney.com 1234 1000003 A
- MembershipRoster... 1234 1000004 A
Click on “Preview Results” to make sure that the merge results are correct.
Click on “Finish & Merge” and select “Send Email Messages”
Complete the Merge to Email

Message options
- **To:** EMAIL
- **Subject line:** Your e-Membership Card from ABC PTA
- **Mail format:** HTML

Send records
- All
- Current record
- From: [ ] To: [ ]
Confirm that the e-Cards have been sent...

- Open Outlook and check your “Outbox” folder

- Instruct your members to save the e-Card image to their computer, smart phone or tablet device for future reference

- Remind your members that they may use their unique verification code displayed on the image to activate their card at www.pta.org/activate and register for National PTA’s member benefits
Time for a LIVE DEMO!
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