

## FOR DOUG, EMILY OR OTHER STAFF

### CREATING THE STUDENT MEMBERSHIP LEGEND

1. Open Student Memberships Database 2021-22.xlsx.
2. On the tab called "Membership Legend," enter school names, membership package names and base prices *as they will appear in Wufoo*. (You may choose to work here first and build the school Wufoo forms from this list. In either case, this Excel sheet and Wufoo *must match exactly*.)
3. The credit card fee should be calculated automatically.
4. SAVE when finished.

### CREATING THE DATA VALIDATION

1. Open Student Memberships Database 2021-22.xlsx.
2. On the tab called "Membership Legend," sort the schools in A-Z order.
3. Copy all school and membership data (columns A:P) and paste into the tab called "Data Validation" starting in the first available row in column A.
4. Delete the price and credit card columns, so that school names are in column A and each membership package follows in the subsequent columns.
5. Update named ranges using the Name Manager under Formulas in the navigation panel:
  - a. Select named range "Schools" and update the cell reference to include all the schools listed in column A on the data validation page.
  - b. Create a new named range for each school's membership packages.
    - i. Click the button "New..."
    - ii. Name the range for the school you are working on, exactly as it appears in column A. If the school's name has spaces, use an underscore instead of a space.
    - iii. Leave Scope set to "Workbook."
    - iv. The cell reference should equal all relevant columns (B:F) in the appropriate row.
    - v. Click "OK."
  - c. Check your work by going to "21-22 Members" and looking for the school in the dropdown list in column D, and the membership packages in column P. If either one does not appear, find the broken named range in the Name Manager and review steps ii-iv for accuracy.

## FOR SUSAN or VOLUNTEER

### ADDING ONLINE MEMBERSHIPS

1. Create a new Excel workbook. Follow naming convention "Student Memberships Batch Control Log 21-22 mm-dd-yyyy".xlsx. (Do not delete backdated versions of this file.)
2. SAVE to Muse Shared > Student Memberships > Memberships > 2021-22 > Batch Control Logs
3. From Wufoo, export only new entries in a school membership form into Excel.

\*New entries are any entries that were submitted after the last batch of memberships was processed. Check the date created or the name in the last recorded Wufoo entry to be sure.

4. Delete columns A-D and G-J.
5. Copy and paste new columns A-AA into the most recent Student Memberships Batch Control Log 21-22 document. Save the batch control log. Delete the export file generated by Wufoo.
6. Repeat this process for each membership form, adding each school's new entries into that day's batch control log. Ensure that columns with like data line up (e.g., first names).

\*Do not add breaks or empty lines between schools.

7. SAVE.
8. Open Student Memberships Database 2021-22.xlsx.
9. If not already open, open any batch control logs that have not yet been added to the database.
10. One batch control log at a time, copy all data minus headers and paste into the table in the Student Memberships Database on the tab called "21-22 Members." The table should automatically add new rows.
11. Check that column AB is correctly calculating graduation year based on data in column E.
12. In column AC, select the type of membership form as "online" from the dropdown menu.
13. Make note of any highlighted cells:
  - a. Yellow in columns B and C indicate a possible duplicate. Investigate further and delete any identifiable duplicate entries.
  - b. Red in column W indicates non-paid status. Send a list of names by school to the Finance team.
14. SAVE the database between batch logs.

### ADDING PAPER MEMBERSHIPS

15. Open Student Memberships Database 2021-22.xlsx.
16. Enter information from each paper form directly into the "21-22 Members" table in the appropriate column. The table should automatically add new rows as you go.
  - a. In column D, select the appropriate school from the dropdown menu.
  - b. In column P, select the correct membership package from the dropdown menu.

\*Please note: column P (membership package) is a *dependent* dropdown menu, which means that the available list options depend on what is entered into column D (school). If you change a student's school, the membership package must be manually updated.

- c. In column V, select the student's payment type (check, credit card or cash) from the dropdown menu.
    - i. Refer to the tab called "Membership Legend" for specific school pricing.
  - d. In column W, select the student's payment status from the dropdown menu.
  - e. Leave columns X-AA blank.
17. Check that column AB is correctly calculating graduation year based on data in column E.
  18. In column AC, select the type of membership form as "online" from the dropdown menu.
  19. Make note of any highlighted cells:
    - a. Yellow in columns B and C indicate a possible duplicate. Investigate further and delete any identifiable duplicate entries.
    - b. Red in column W indicates non-paid status. Send a list of names by school to the Finance team.
  20. SAVE the database periodically.

#### TALLYING MEMBERSHIPS

21. In the database, on tab called "School Member Totals," go to Data on the navigation panel.
22. Click "Refresh All," and Excel will automatically tally memberships by school, sorted into paper vs. online and total payments due.

\*This tab is set up to count memberships based on data in column P "Membership Package" on tab "21-22 Members." If P is empty for some reason, that row will not be counted.

23. SAVE the database.
24. Copy and paste the "School Member Totals" table into an email and send to the Secondary Program Director and Bookkeeper, and Executive Director, as necessary.