M3

(MEMBERSHIP MANAGEMENT MODULE)

PROCEDURE MANUAL

SEPTEMBER 2014

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LOGIN TO M3

Step 1: Go to www.pta.org/M3 and click on M3 Access.

Login tips:

      a. Chrome does not support M3. **For best results, use Mozilla Firefox or Internet Explorer.**

      b. Always access the M3 site by going to www.pta.org/M3 and clicking on the M3 Access link. Please do not try to log in from any other link or from the history of your browser. Logging in with the link listed at www.pta.org/M3 will ensure that you are accessing the most current information in the database for your state PTA.

Step 2: Enter your e-mail address and click the green "Check" button. Please see the screen print below for reference.

Step 3: Verify that the "Log In" screen below appears.

Please enter your user name and password, and click "Login". **Your e-mail address will automatically appear. If your <u>username</u> for M3 access is different from your e-mail address, please change the username here and enter your password. Once your state PTA homepage appears, you have successfully logged in.** If you are unable to login, please proceed to **Steps 4-7.**
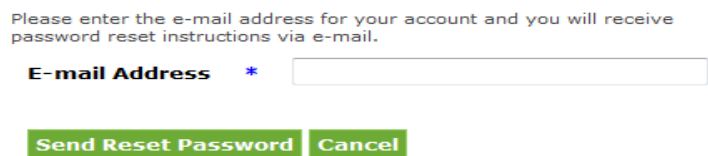
Step 4: If you forgot your password? Please click the "Click here to reset." option shown on the login screen above. The password request option below will appear and ask you to enter
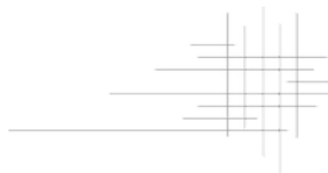
your e-mail address in order to receive an e-mail to reset your password. **Enter your e-mail address NPTA has on file for you, and click "Send Reset Password".**

Please enter the e-mail address for your account and you will receive
password reset instructions via e-mail.

E-mail Address   * [   ]

Send Reset Password **Cancel**

Step 5: When the confirmation screen below appears, click "Ok". You will receive an e-mail with instructions to reset your password shortly.
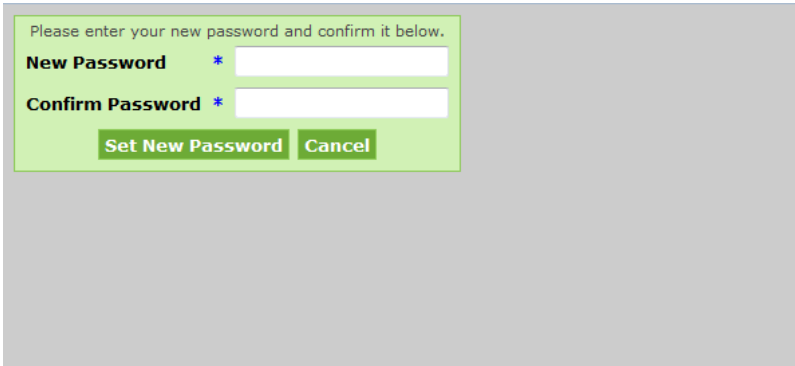
Your request has been processed. Reset instructions have been emailed to you.

Ok

Step 6: Check your e-mail account for the reset password link, click the link in the e-mail, and follow the instructions provided to reset your password.

*Note: The e-mail will come from passwordreset@sso.com (please make sure you add this e-mail address to your contact list to ensure delivery of notifications to your inbox, instead of delivery to your spam/junk e-mail folder). If you have not received a timely email requesting your new password, please check your spam/junk folder for the link. You may also email NPTA at membership@pta.org with your full name, state PTA title, and your PTA profile email address.

Step 7: When the screen below appears, enter your **new password**, confirm the password, and click "Set New Password". Once the system confirms your password, you have successfully logged into M3. **Please make a note of your new password for future use.**

Please enter your new password and confirm it below.
New Password   * [   ]
Confirm Password * [   ]
Set New Password **Cancel**

Update State Contact Information

Step 1: Click on "Update State Profile" listed on the taskbar to the left of you homepage.

Step 2: Click the "Edit" button next to "State Contact Information".

Step 3: Click the "Edit" option under the address box to change/update info. Click the "Disable" option under the address box to disable the address shown in the box. **Do not disable the primary address box unless there is a secondary address box listed. If you decide to disable the primary address box, please remember to mark the secondary address as the <u>primary</u> address box.**

Note: The "Icon Legend" serves as a key to identify profile address types.

Step 4: Make all changes and click save. (You can also disable a secondary address here by clicking disable. Again, if this is your only profile address, please do not disable it.

Step 5: Once you click save, the screen will return to the "Edit State Profile" page below. To make changes to other addresses listed, please repeat **steps 1 through 4**.

Step 6: To add a new address- Click ➕ Add a new address that appears just above the Icon Legend. To update the phone, fax, or e-mail, please proceed to **step 7**.

Step 7: To edit an e-mail address, click the "Edit" button next to the e-mail address you want to update. To delete an e-mail addresss, click the "Delete" button next to the e-mail address you want to delete.

Click "edit" to make changes to the e-mail or phone contact information, or click "delete" to remove the information that is no longer valid.

Update State Roles

Step 1: Click on "Update State Profile" listed on the taskbar to the left.

Step 2: To make changes to the State Role Information, click the "Edit Role" button next to the individual you want to update.
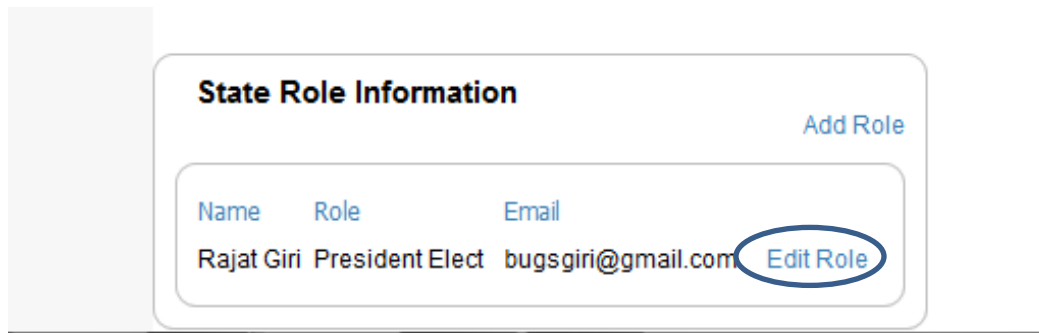
Step 4: Verify that the Edit State Role Info page shown below appears. Using the drop box choices, select the position, sub position, participation status, or the voting status. Click "save". If you would like to make additional profile updates, repeat this step.
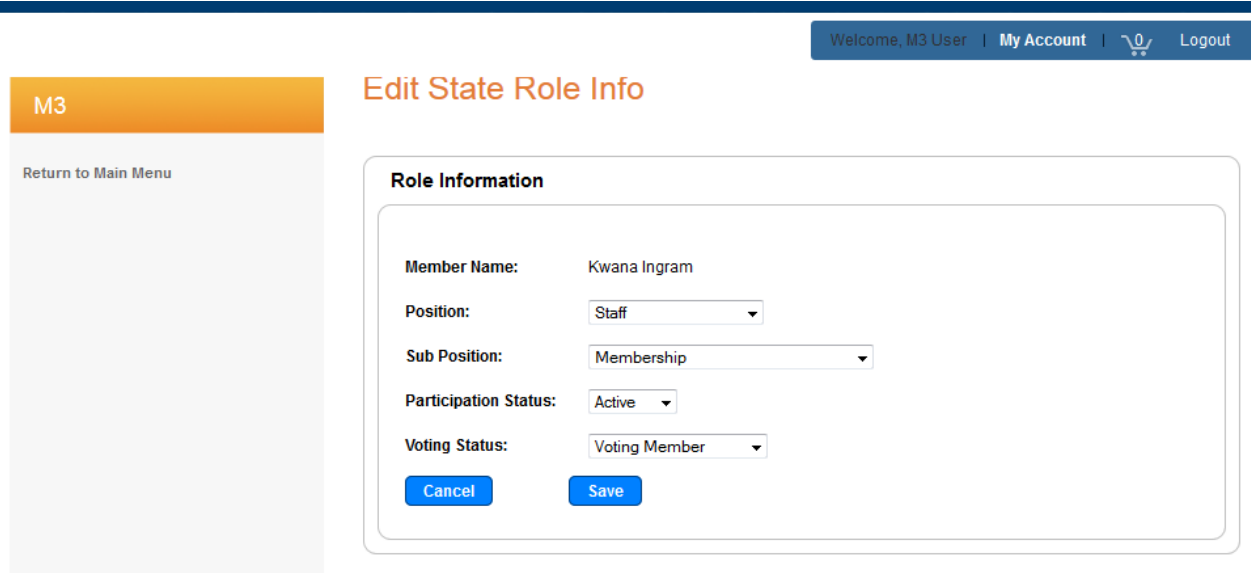
*Note: Verify the State Role Information you updated is displayed correctly before clicking "save".
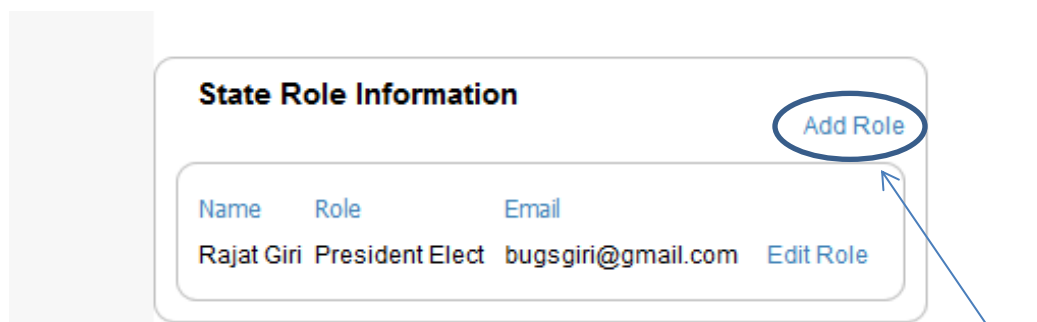
Step 5: To add individuals to "State Role Information" click the "Add Role" button.

Step 6: To reduce duplicate profiles, you must search to ensure the individual you are adding does not have a profile in the database. Conduct a search by first and last, the e-mail address, or by city of the individual you are adding. Click "search".

Search Customer

Search Customer

First Name	smith	Last Name	west
Email			
City			

Search

Show 10 ▾ entries   Filter Customers: [   ]

Customer ID	Name	City	State	Email	
02702179	Smith West	APO	AE	smithwest@pta.org	Select
Customer ID	Name	City	State	Email	

Showing 1 to 1 of 1 entries   ◀ Previous Next ▶

If you don't find your Customer in the list please click here

Before adding a local unit, you must first assign a local unit President.

- If the customer you are adding is found, click the "select" button to the right of his or her information. **If the customer is not found, proceed to step 8.**

Return to Main Menu

Role Information

Member Name:	Kwana Ingram
Position:	Staff ▾
Sub Position:	Membership ▾
Participation Status:	Active ▾
Voting Status:	Voting Member ▾

Cancel   Save

Step 7: You can update the position, sub position, participation status, voting status, and click "save".

Step 8: If the customer you are adding is **not** found, you are required to enter their information in the "Add Customer" screen below and click "Add customer for Role" at the bottom of the screen.

ADD LOCAL UNIT

Step 1: On the left taskbar, click Add Local Unit.

Step 2: Once the Search Customer screen below appears, enter information into one or more of these fields to search for the President of the local unit you are adding. You can search by first <u>and</u> last, just the e-mail address, or by city. Once all search information is entered, click the Search button.

- If the President for the local unit you are adding is found, click the Select button to the right of his or her information. You will automatically advance to Step 5.

- If the President for the local unit you are adding is not found, click here.

Step 3: The New Local Unit President screen will appear. Enter **personal contact information** for the new President. It is very important that the personal information for the local unit President is added. This information is used to mail local leader resources directly to the President when the school is closed. This address should not be a school address. All fields marked in red are required fields:

<u>Required fields</u>

- first name
- last name
- address type (should be marked as primary)
- address line 1
- city
- state
- zip code
- e-mail address.

*Other fields are optional.

Internet Communication

Email

PTA Title   President

* Fields marked in red are required

Create President   Cancel

Step 4: Once the President's information is entered, click Create President.

Step 5: Verify that the New Local Unit screen above appears. Enter the information for the new local unit. All fields marked in red are required fields:

Required fields

- local unit name
- address type (should be marked as primary)
- address line 1
- city
- state
- zip code

*Other fields are optional.

Step 6: Once you have entered all the required local unit information, click Create Local Unit.

Step 7: Your screen will automatically return to your homepage once the local unit has been successfully created.

Step 8: Enter the name of the new local unit you just created in the Filter Local Unit box to filter the list of local units to get the **local unit ID#** for the new local unit.

Step 9: Verify that your new local unit appears in the local unit listing. Please note the new local unit ID# for your records.

Step 10: Remove the name of the local unit from the Filter local unit box to return to the full list of local units.

Upload Member to Local Unit

Step 1: On the left taskbar, click "Add Members to Local Unit".
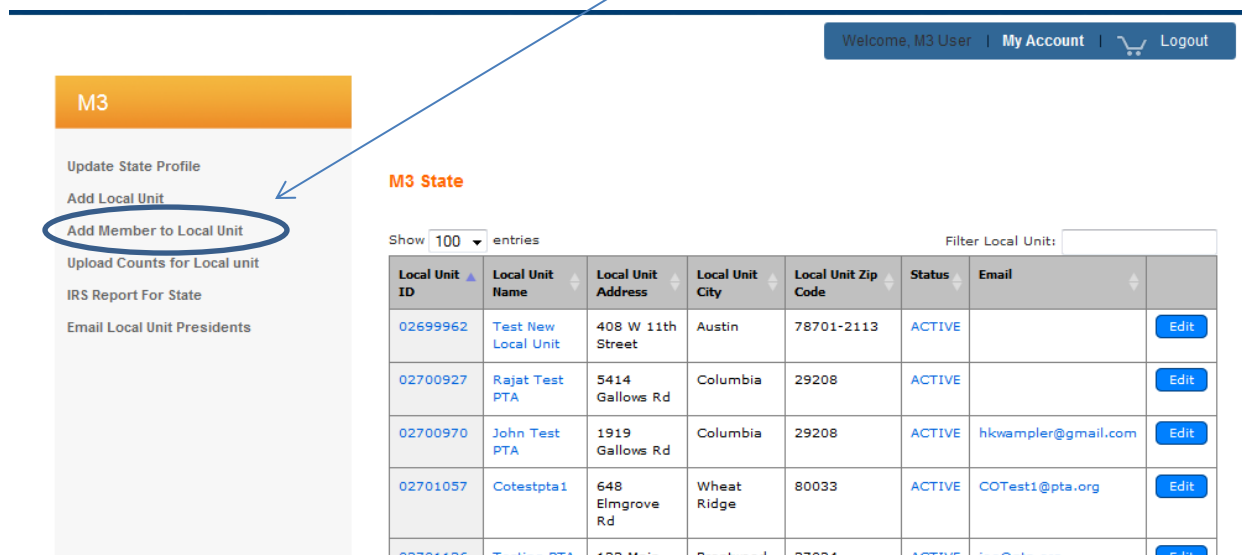
Step 2: Enter the member(s) information into the Member Upload Template (template can be found at www.pta.org/M3). The required fields for this template are:

- local unit ID#
- first name of the member or officer
- last name of the member or officer
- e-mail address to contact the member or officer
- position (i.e. member, President, President-Elect) *Use dropdown list to choose the position.

See sample template below.
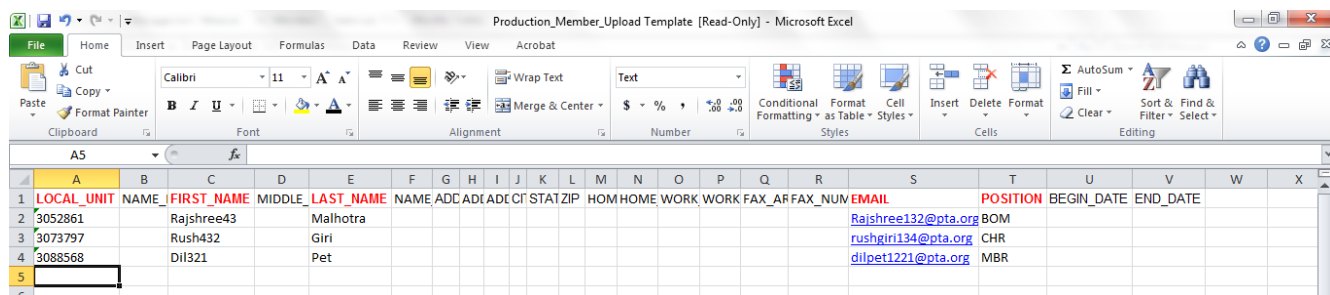
Step 3: Save the completed Member Upload Template.

Step 4: Go to M3, click the browse button to locate the completed Member_Upload Template you saved in **Step 3**. Then click upload. (See illustrations below before proceeding).

Member Upload for Local Unit(s)

Directions:

a. Click on browse to select the file to be uploaded.
b. Click on upload to upload the file.
c. Click on validate to validate the records. If Members record in red they are error and preventing import, please correct these records in file and upload the file again. (Repeat steps a to c).
d. Once all records are validated please click on import

> Please follow the directions here to upload the template.

> Click browse to locate your saved Member_ Upload file.

Members Information: [Browse...] No file selected. [Upload]

Show [10 ▾] entries   Filter Uploaded Local Unit Member: [_____]

Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message
			No Uploaded Local Unit Member Found				
Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message

Showing 0 to 0 of 0 entries   ◀ Previous   Next ▶

In process:

Show [10 ▾] entries   Filter In Process Local Unit Member: [_____]

Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message
			No In Process Local Unit Member Found				

*Note: The name of your file should appear beside the browse button.

Directions:

a. Click on browse to select the file to be uploaded.
b. Click on upload to upload the file.
c. Click on validate to validate the records. If Members record in red they are error and preventing import, please correct these records in file and upload the file again. (Repeat steps a to c).
d. Once all records are validated please click on import

> After verifying the correct file has been selected, then click upload.

Members Information: [Browse...] Member_Upload Template (Manual Copy).xls [Upload]

Show [10 ▾] entries   Filter Uploaded Local Unit Member: [_____]

Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message
			No Uploaded Local Unit Member Found				

Step 5: Once the member information appears here, click Validate.

a. Click on browse to select the file to be uploaded.
b. Click on upload to upload the file.
c. Click on validate to validate the records. If Members record in red they are error and preventing import, please correct these records in file and upload the file again. (Repeat steps a to c).
d. Once all records are validated please click on import

Members Information: [Browse...] No file selected. [Upload]

Show 10 ▾ entries   Filter Uploaded Local Unit Member: [   ]

Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message
02700970	Tommy Smith	1245 North Pitt Street Alexandria VA 22314	Home: Work: Fax:	tommy@aol.com	Member 9/23/2013-9/22/2014		
02701057	Tiffany Carter	1200 North Pitt Street Alexandria VA 22314	Home: Work: Fax:	Tiffany@yahoo.com	Member 9/23/2013-9/22/2014		
Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message

Showing 1 to 2 of 2 entries (filtered from 0 total entries)   Previous Next

[Validate]

In process:

Show 10 ▾ entries   Filter In Process Local Unit Member: [   ]

Step 6: Change the Show ___ entries drop box to 100 if you have more than 100 entries and click the "next" button to review all pages of entries. Verify that there are no errors with the upload. All errors will be listed in red with an "x" mark and brief message of errors found.

Members Information: [Browse...] No file selected. [Upload]

Show 10 ▾ entries   Filter Uploaded Local Unit Member: [   ]

Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message	
02701057	Tiffany Carter	1200 North Pitt Street Alexandria VA 22314	Home: Work: Fax:	Tiffany@yahoo.com	Member 9/23/2013-9/22/2014		Invalid Local-02701057 ;; Invalid STATE, Valid state - VA ;;	✖
02700970	Tommy Smith	1245 North Pitt Street Alexandria VA 22314	Home: Work: Fax:	tommy@aol.com	Member 9/23/2013-9/22/2014		Invalid Local-02700970 ;; Invalid STATE, Valid state - VA ;;	✖
Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message	

Showing 1 to 2 of 2 entries (filtered from 0 total entries)   Previous Next

[Validate] [Import]

In process:

Show 10 ▾ entries   Filter In Process Local Unit Member: [   ]

Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message	

*Possible errors with instructions of how to verify and correct them are provided below.

- Invalid local ########:

  - Return to your Member Upload Template to verify the correct local unit ID# was entered. If the incorrect local unit ID# was entered, correct the ID#, save it to your computer, and repeat steps 5, 6, and 7.

  - If the local unit ID# was entered correctly on your Member Upload Template, check to make sure the local unit is active. The status of a local unit can be verified by clicking Return to Main Menu on the left taskbar. See "Updating the Status of Local Unit" for instructions on how to change the status of a local unit to active.

Member Upload for Local Unit(s)

Directions:

a. Click on browse to select the file to be uploaded.
b. Click on upload to upload the file.
c. Click on validate to validate the records. If Members record in red they are error and preventing import, please correct these records in file and upload the file again. (Repeat steps a to c).
d. Once all records are validated please click on import
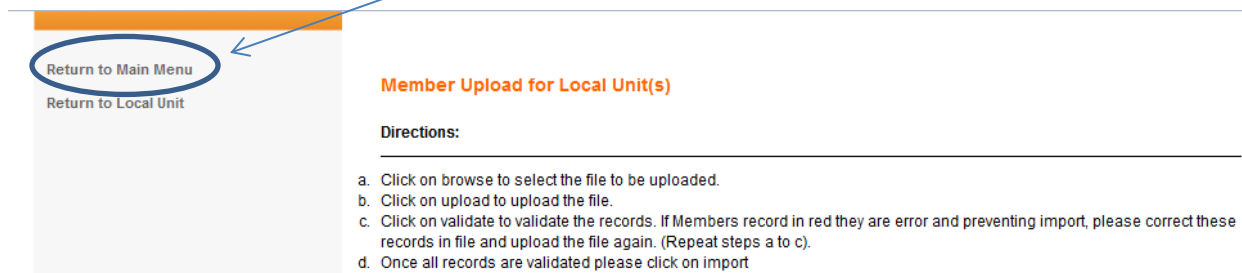
- Invalid STATE, valid state:

  - Return to your Member Upload Template to verify the correct zip code and city are entered. If the incorrect zip code and city are entered, correct the zip code and city, save it to your computer, and repeat steps 5, 6, and 7.

Step 7: If there are no errors, and all entries are marked as "validated" with a check mark, click "Import" to complete the upload process.
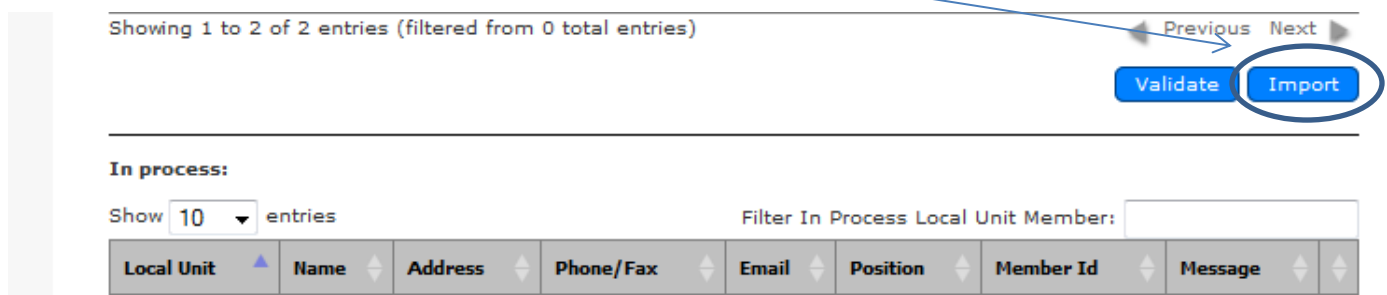
Update Local Unit Status: (Activating and Deactivating Units)

Step 1: From the state home screen, search the list for local units you want to report members for. To filter your search, enter the local unit ID#, name, address, city, or zip code in the Filter Local Unit: located at the top right of the list.

Step 2: Click on "Inactive" or "Active". The popup box below will appear with the confirmation message for the change. Click "Ok" to confirm you want to change the status, or click "Cancel" if you want to cancel the status change.

Update Local Unit Contact Information

Step 1: From the state homepage, search the list for the local units that you would like to update. To filter your list of units, enter the local unit ID#, name, address, city, or zip code in the Filter Local Unit: located at the top right corner of the list. Once you find the local unit, please make sure the local unit status is "Active". **If the local unit status is listed as "Inactive", please see the instructions for Updating the Status for Local Units.**

Step 2: Click on the local unit ID#, local unit name, or the "Edit" button below for the local unit that you would like to update.

Step 3: Verify that the Local Unit home screen below displays, then verify the local unit's name displays at the top of the screen. Click "Update Local Unit" listed on the left task menu.

Step 4: Verify that the Local Unit Profile Update screen below displays.

Step 5: Click the "Edit" button next to "Local Unit Contact Information" to update the contact information for the local unit.

Return to Main Menu

Return to Local Unit

Back to Profile Page

Primary

John Test PTA
1919 Gallows Rd
Columbia, SC 29208
United States

Edit the primary address on file for the local unit.

Edit

Disable

Disable an address that is no longer in use. Please "edit" primary addresses instead of "disabling" them if a secondary address is <u>not</u> listed.

Add a secondary or ship-to address for the local unit.

➕ Add a new address

Add phone numbers and e-mail addresses for the local unit.

Icon Legend:
- Address is a ship-to address
- Address is a bill-to address
- Address is published in the member directory
- Address is confidential

Edit and delete phone numbers and e-mail addresses from local unit profile.

This legend provides an explanation for the icons listed on the profile for the local unit.

My Communication Methods ➕ Add new communication method

Primary Email: johnpta@pta.org

✅ 📒 Edit ✖ Delete

Local Unit Role Information

Add Role

Name	Role	Email	
Heather Wampler	President	hkwampler@gmail.com	Edit Role

Step 6: To add individuals click the "Add Role". You must search the system to see if the individual you are adding already has a membership record to reduce duplications. Please enter the first and last name, e-mail address, or city for the individual you are adding.

M3

Search Customer

Search Customer

First Name		Last Name	
Email			
City			

Search

If you don't find your Customer in the list please click here

Search Customer

Search Customer

First Name	smith		Last Name	west	
Email					
City					

Search

Show 10 ▼ entries   Filter Customers: [   ]

Customer ID	Name	City	State	Email	
02702179	Smith West	APO	AE	smithwest@pta.org	Select
Customer ID	**Name**	**City**	**State**	**Email**	

Showing 1 to 1 of 1 entries   ◀ Previous   Next ▶

If you don't find your Customer in the list please click here

- If the President for the local unit you are adding is found, click the Select button to the right of his or her information. You will automatically advance to Step 7.

Return to Main Menu

You can update the position, sub position, participation status, and voting status. Then click "save".

Role Information
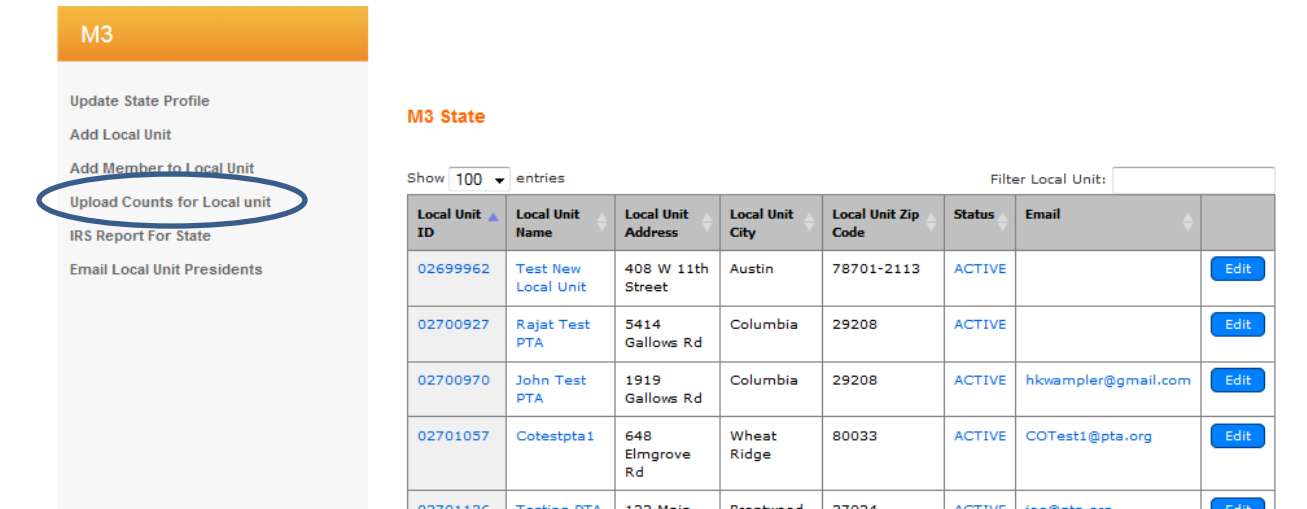
Member Name:	Kwana Ingram
Position:	Staff ▼
Sub Position:	Membership ▼
Participation Status:	Active ▼
Voting Status:	Voting Member ▼

Cancel   Save

Upload Counts for Local Units

Step 1: Click on "Upload Counts for Local Units" on the left taskbar.

Step 2: Enter the membership totals into the Dues Template (template can be found at www.pta.org/M3). The required fields for this template are:

- local unit ID#
- member additions (# of members the local unit reported)

See sample template below.

Step 3: Save the completed Dues_ Template.

Step 4: Go to M3, click browse button to locate the completed Dues_ Template you saved in **Step 3**. Then click "upload". (See illustrations below before proceeding).

Please follow the directions here to upload the template.

Click browse to locate your saved Dues Template file.

State Membership Information

Total Reported Member Count:	0
Member Count for current month:	0
Pending Dues payment:	$0
YTD Dues:	$0

Upload Local Unit Counts

Directions:

a. Click on browse to select the file to be uploaded.
b. Click on upload to upload the file.
c. Click on validate to validate the records. If record in red they are error and preventing import, please correct these records in file and upload the file again. (Repeat steps a to c).
d. Once all records are validated please click on import.

Members Information: Browse... No file selected. Upload

Show 10 entries   Filter Uploaded Counts:

Local Unit	Invoice Run Date	Membership Additions	Price	Message
No Uploaded Counts Found				
Local Unit	Invoice Run Date	Membership Additions	Price	Message

Showing 0 to 0 of 0 entries   Previous Next

*Note: The name of your file should appear beside the browse button.

Members Information: Browse... DUES_TEMPLATE.xls Upload

Show 10 entries   Filter Uploaded Counts:

Local Unit	Invoice Run Date	Membership Additions	Price	Message
No Uploaded Counts Found				
Local Unit	Invoice Run Date	Membership Additions	Price	Message

Showing 0 to 0 of 0 entries   Previous Next

After verifying the correct file is selected, click "upload".

Step 5: Once the dues information appears here, click "validate".

a. Click on browse to select the file to be uploaded.
b. Click on upload to upload the file.
c. Click on validate to validate the records. If record in red they are error and preventing import, please correct these records in file and upload the file again. (Repeat steps a to c).
d. Once all records are validated please click on import.

Members Information: Browse... No file selected. Upload

Show 10 entries   Filter Uploaded Counts:

Local Unit	Invoice Run Date	Membership Additions	Price	Message
02700970		100	$225.00	
Local Unit	Invoice Run Date	Membership Additions	Price	Message

Total: $225.00   Validate

- Invalid STATE, valid state:

    o Return to the local unit profile to verify if the address is correct. If the address is correct, contact National PTA at membership@pta.org to assist with validating the address in the database. Once you receive a confirmation that the address has been validated from National PTA, repeat steps 4 and 5.

- Invalid local ########:

    o Return to your Dues Template to verify the correct local unit ID# was entered. If the incorrect local unit ID# was entered, correct the ID#, save it to your computer, and repeat steps 3, 4, and 5.

    o If the local unit ID# was entered correctly on your Dues Template, check to make sure the local unit is active. The status of a local unit can be verified by clicking Return to Main Menu on the left taskbar. See "Updating the Status of Local Unit" for instructions of how to change the status of a local unit to active.

Change Show 10 ▾ entries to 100 entries to ensure that you are reviewing as many entries as possible. Then arrow through each page of entries by clicking ◀ Previous Next ▶ to review all the uploaded entries.

Step 7: If there are no errors, and all entries are marked as "validated" with a check mark, please go to Step 8.

Step 8: You can click "Import" to complete the upload process.

Add Member

Step 1: From the state homepage, search the list for the local units you want to update. To filter your list of units, enter the local unit ID#, name, address, city, or zip code in the Filter Local Unit: box located at the top right corner of the list. Once you find the local unit, please make sure the local unit status is "Active". **If the local unit status is listed as "Inactive", please see the instructions for Updating the Status for Local Units.**

Step 2: Click on the local unit ID#, local unit name, or the "Edit" button for the local unit you want to update.

Step 3: Verify that the Local Unit home screen below displays, by verifying the local unit's name displaying at the top of the screen. Click "Update Local Unit" listed on the left task menu.

Step 4: Verify that the "Search Member to be added to the Local Unit" screen below displays. You must search the system to see if the individual you are adding already has a membership record. Please enter the first and last name, e-mail address, or city for the individual you are adding.

- If the member that you are adding is found, click the "select button" to the right of his or her information. This will add the new member to this local unit.

- If the member you are adding **is not** found, select "click here" to enter the member's information.

Step 5: Enter the member's information into the screen above. All fields marked in red are required. Once all the information is entered, click "Create Member".

Update Local Unit Roles

Step 1: From the state homepage, search the list for the local units you want to update. To filter your list of units, enter the local unit ID#, name, address, city, or zip code in the Filter Local Unit: [ ] box located at the top right corner of the list.

Step 2: Click on the local unit ID#, local unit name, or the "Edit" button for the local unit you want to update.

Step 3: Verify that the Local Unit home screen below displays, then verify the local unit's name displaying at the top of the screen. Click "Update Local Unit" listed on the left task menu.

Step 6: To add individuals, click the "Add Role". You must search the system to see if the individual you are adding has a membership record to reduce duplication. Please enter the first and last name, e-mail address, or city for the individual you are adding.

- If the President you are adding is found, click the "Select" button to the right of her or his information and proceed to step 8. If the President is not found, proceed to Step 8.

You can update the position, sub position, participation status, and voting status. Clicks "save".

Step 7: Using the dropbox choices, you can update the position, sub position, participation status, and voting status of individuals. Click "save" to confirm the changes.

Step 8: If the individual you are adding is **not** found as shown in the screen above, you are required to enter the information for the individual in the "Add Customer" screen below and click "Add customer for Role" at the bottom of the screen.

Update Local Unit Counts for Local Units: Reporting on the local unit level

*Note: This is a second option for reporting monthly membership. You can choose to upload the Dues Template provided with your membership totals or report on the local unit level with the steps below.

Step 1: From the state homepage, search the list for local units you want to update. To filter your list of units, enter the local unit ID#, name, address, city, or zip code in the

Filter Local Unit: [   ] box located at the top right corner of the list. Once you find the local unit, please make sure the local unit status is "Active". **If the local unit status is listed as "Inactive", please see the instructions for Updating the Status for Local Units.**

Step 2: On the screen below, click on the local unit ID#, local unit name, or the "Edit" button for the local unit you want to update.

Step 3: Verify the Local Unit home screen below displays, then verify the local unit's name is displayed at the top of the screen. Click "Update Local Unit" listed on the left task menu.

Step 4: Verify that the Local Unit Profile Update screen below displays.

Step 5: Enter the number of members for this local unit in the "Update Member Counts", and click "Update". Once you click "Update", you have reported local unit member counts

for the current month. NOTE: You will need to repeat this update process for EACH local unit. (For example, if you have 25 units to report member counts for the month, you will need to repeat steps 1 through 5 a total of 25 times to report ALL 25 unit counts.)

Reporting a Zero for Membership Counts

Step 1: From the state homepage, choose **one active local unit** you want to update. To filter your list of units, enter the local unit ID#, name, address, city, or zip code in the [Filter Local Unit: _____] box located at the top right corner of the list. Once you find the local unit, please make sure the local unit status is "Active".

Step 2: On the screen below, click on the local unit ID#, local unit name, or the "Edit" button to view the "ACTIVE" local unit in your listing.

Step 3: Verify the Local Unit home screen below displays, and that the local unit's name is displayed at the top of the screen. Click "Update Local Unit" listed on the left task menu.

Step 4: Verify the Local Unit Profile Update screen below displays.

Step 5: Enter "0" in the "Update Member Counts" and click "Update". Once you click "Update", you have reported a "zero" for the current month member count.

M3 Reports

Step 1: Click on "Reports" listed on the taskbar to the left of the homepage.
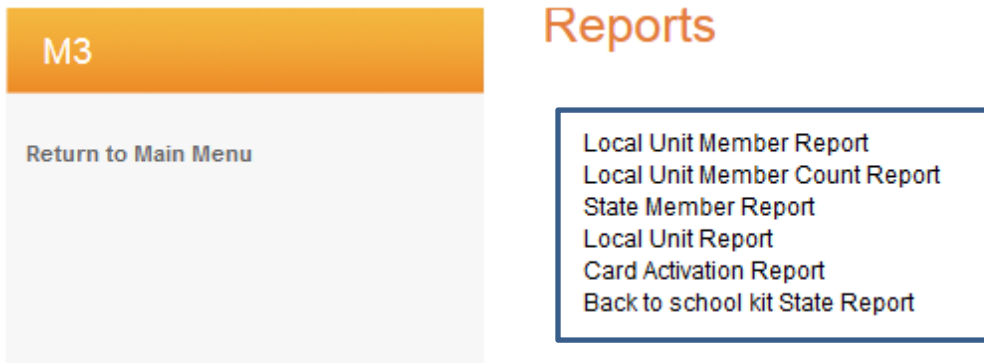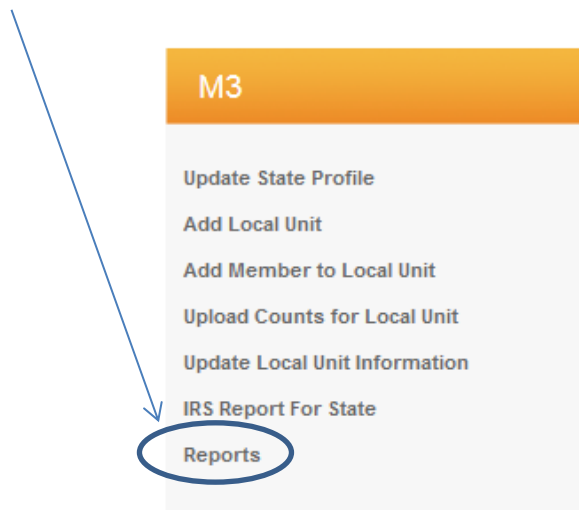
- **Local Unit Member Report-** This report will present a list of the members for a particular local unit.
- **Local Unit Member Count Report-** This report will present the counts for all the local units in the state. There is an option to enter the search "start date" and "end date", or click "continue" to pull all the information available.
- **State Member Report-** This report will give a list of the members for the State PTA.
- **Local Unit Report-** This report will give a list of the state's active or inactive local units.
- **Card Activation Report-** This report will give a list of the members that updated their PTA profiles from the previous membership year, and the members that created new PTA profiles for the current National membership year from July 1 to June 30.
- **Back to School kit State Report-** This report will give you a list of the State and Local leaders that registered to receive the Back to School Kit.

Pulling a Local Unit Member Report
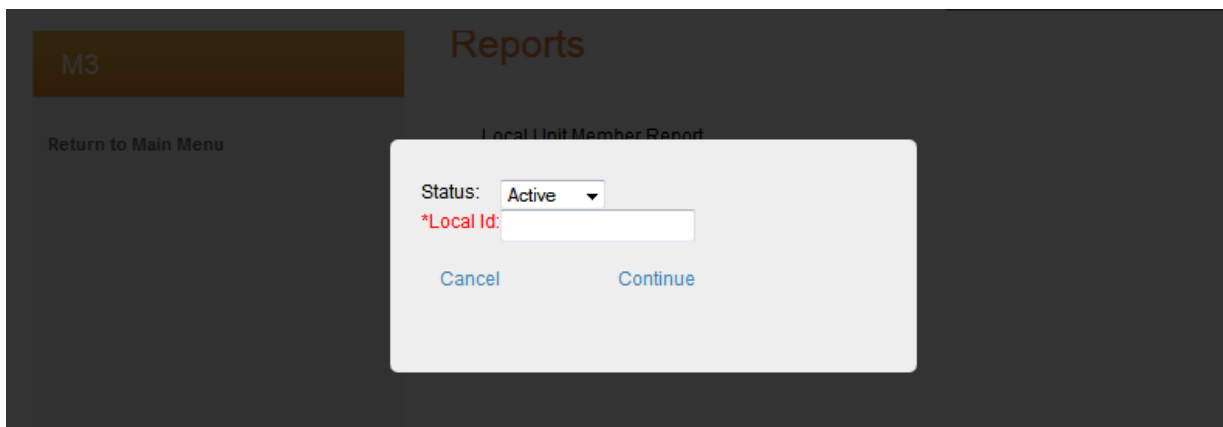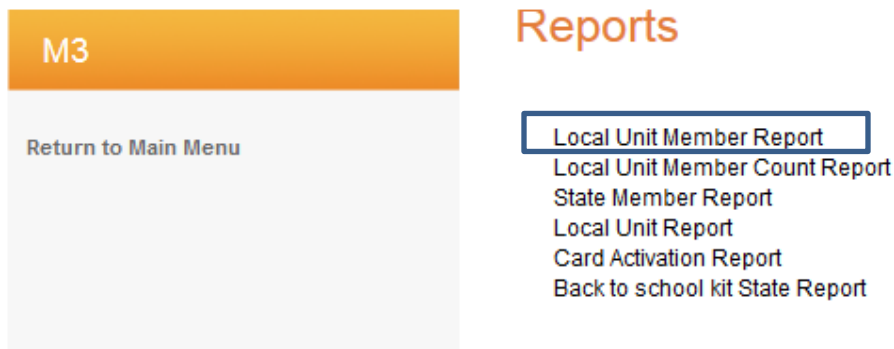
Step 1: Click on "Local Unit Member Report" in the list of reports.

Step 2: Choose what local unit status you would like to pull.

Step 3: Enter the local unit ID# provided by National PTA or assigned in M3 during the time of setting the unit up in the database.

Step 4: Click "Continue".

Pulling Local Unit Member Count Report
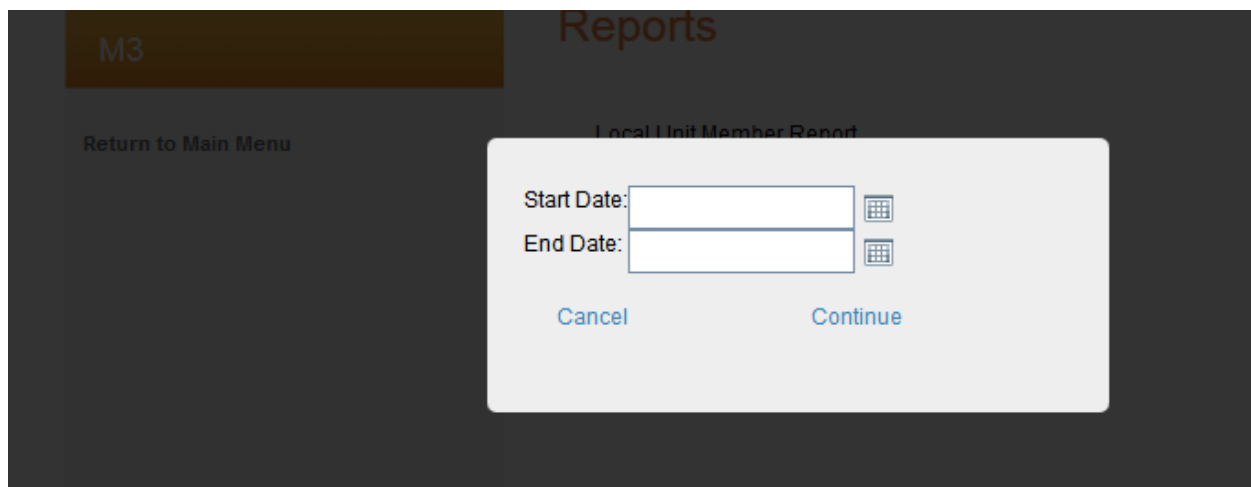
Step 1: Click on "Local Unit Member Count Report" in the list of reports.

Step 2: Enter the start and end dates for the time period you would like the report for and click "Continue", or leave the start and end dates blank and click "Continue" to pull the full list counts for your local units.

Pulling State Member Report
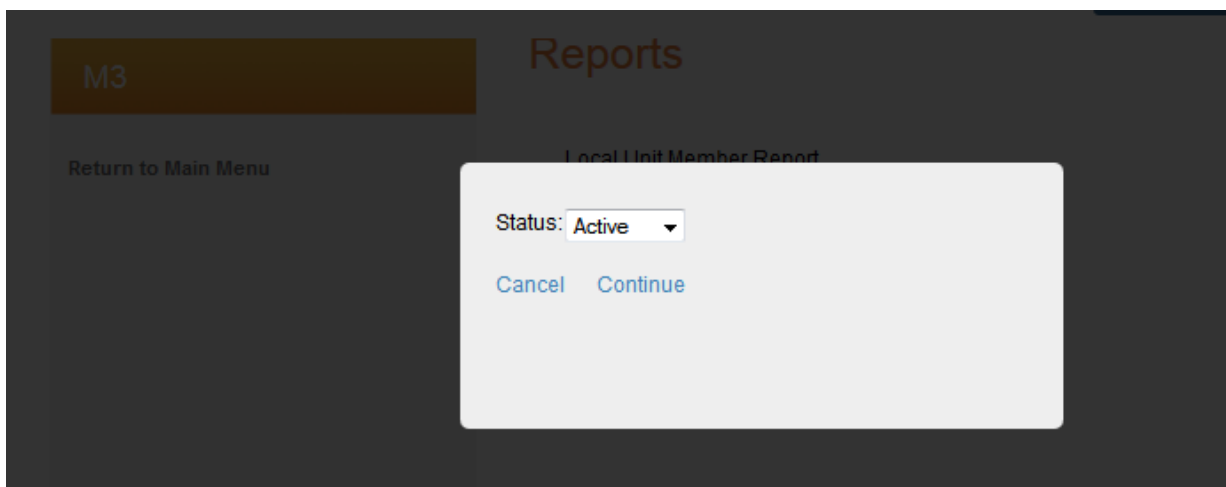
Step 1: Click on "State Member Report" in the list of reports.

Step 2: Choose the member status you would like to pull for and click "Continue".

Pulling Local Unit Report
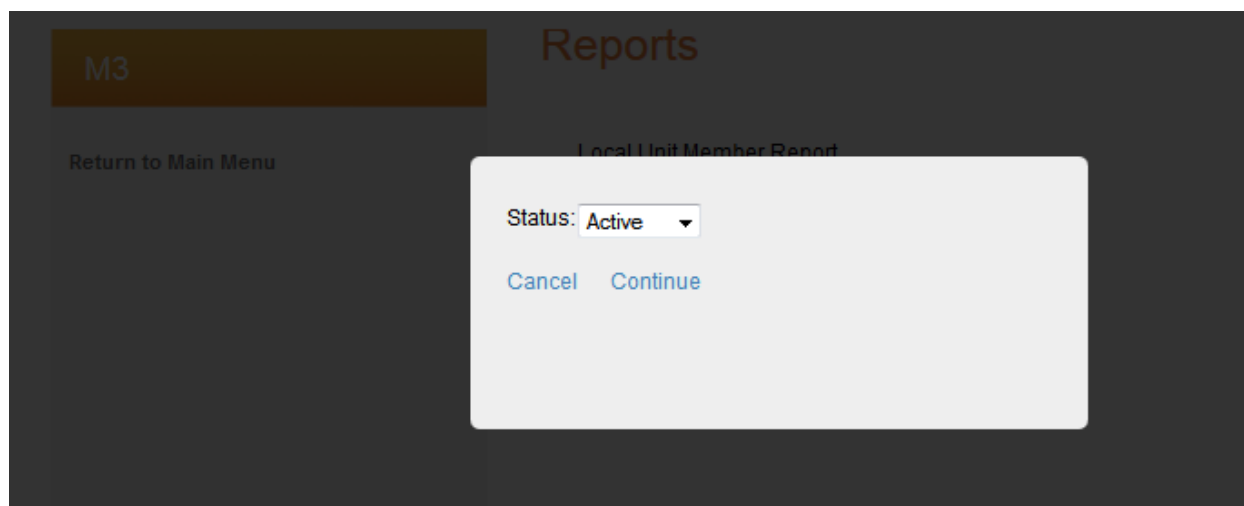
Step 1: Click on "Local Unit Report" in the list of reports.

Step 2: Choose the member status you would like to pull for and click "Continue".

Pulling the Card Activation Report (Create Your PTA Profile)

Step 1: Click on "Card Activation Report" in the list of reports. The report will appear with the contact information and local unit affiliation for each member that created or updated their PTA profile.
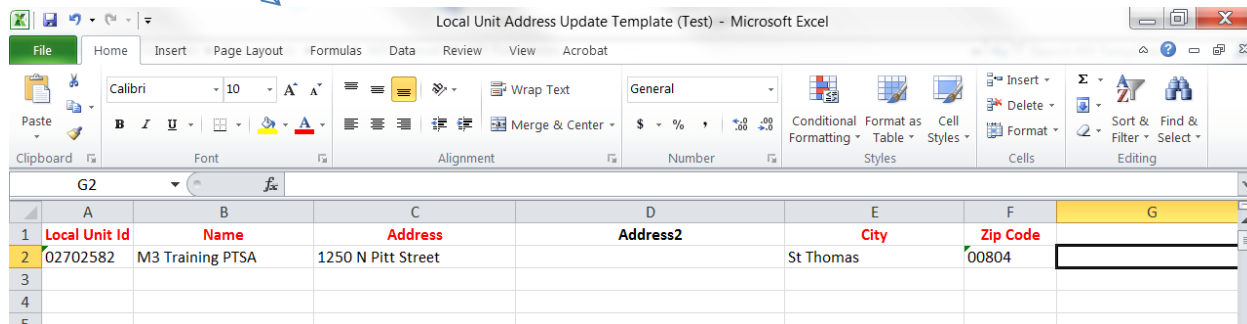
Pulling the Back to School kit State Report

Step 1: Click on "Back to School Kit State Report" in the list of reports. The report will appear with the contact information, local unit affiliation, and ship date for each leader that registered to receive the Back to School Kit.

Upload Local Unit Information

Step 1: Enter the information listed below into the Local Unit Information Update template. The template can be found at www.pta.org/M3 . After entering the unit information into the template and saving it, upload the template to M3.

- Enter the local unit ID#.
- Enter the name for the local unit. This should be the **new name** for the local unit if you are changing the name of the local unit.
- Enter the address, city, and zip code for the **school**.
- Save it.

Step 2: Log in to M3. (Please see the login section of this manual for login steps.)

Step 3: On the left toolbar, click the link that says "Update Local Unit Information".

Step 4: Please follow the "Directions" listed at the top of the M3 screen.

Please follow the directions here to upload the template.

Click browse to locate your saved Update Local Unit Information Template.

Upload Local Unit(s) Address

Directions:

a. Click on Browse to select the file to be uploaded.
b. Click on Upload to upload the file.
c. Click on validate to validate the records, if Members record in red they are error and preventing import. Please correct these records in file and upload the file again. (Repeat steps a to c).
d. Once all records are validated please click on import

Address Information: Browse...   No file selected.   Upload

Show 10 ▼ entries   Filter Uploaded Local Unit Address: _____

Local Unit	Name	Address	Address 2	City	Zip Code	Message	
No Uploaded Local Unit Address Found							
Local Unit	Name	Address	Address 2	City	Zip Code	Message	

Showing 0 to 0 of 0 entries   ◄ Previous   Next ►

In process:

Show 10 ▼ entries   Filter In Process Local Unit Address: _____

Local Unit	Name	Address	Address 2	City	Zip Code	Message	
No In Process Local Unit Address Found							
Local Unit	Name	Address	Address 2	City	Zip Code	Message	

Showing 0 to 0 of 0 entries   ◄ Previous   Next ►

*Note: The name of your file should appear beside the browse button

After choosing and verifying the file, then click upload.

Upload Local Unit(s) Address

Directions:

a. Click on Browse to select the file to be uploaded.
b. Click on Upload to upload the file.
c. Click on validate to validate the records, if Members record in red they are error and preventing import. Please correct these records in file and upload the file again. (Repeat steps a to c).
d. Once all records are validated please click on import

Address Information: Browse...   Local Unit Address Update Template (Test).xlsx   Upload

Show 10 ▼ entries   Filter Uploaded Local Unit Address: _____

Local Unit	Name	Address	Address 2	City	Zip Code	Message	
No Uploaded Local Unit Address Found							
Local Unit	Name	Address	Address 2	City	Zip Code	Message	

Showing 0 to 0 of 0 entries   ◄ Previous   Next ►

In process:

Show 10 ▼ entries   Filter In Process Local Unit Address: _____

Local Unit	Name	Address	Address 2	City	Zip Code	Message	
No In Process Local Unit Address Found							
Local Unit	Name	Address	Address 2	City	Zip Code	Message	

Showing 0 to 0 of 0 entries   ◄ Previous   Next ►

Step 4: Once the local unit information appears, click Validate.

Step 5: Change the Show ___ entries drop box to 100 if you have more than 100 entries and click the "next" button to review all pages of entries. Verify that there are no errors with the upload. All errors will be listed in red with an "x" mark and brief message of errors found.

*Possible errors with instructions of how to verify and correct them are provided below.

- Invalid local ########:

    o Return to your Local Unit Information Update template to verify the correct local unit ID# was entered. If the incorrect local unit ID# was entered, correct the ID#, save it to your computer, and repeat steps 3 through 5.

    o If the local unit ID# was entered correctly on your Local Unit Information Update template, check to make sure the local unit is active. The status of a local unit can be verified by clicking Return to Main Menu on the left taskbar. See "Updating the Status of Local Unit" for instructions on how to change the status of a local unit to active.

- Invalid STATE, valid state:

    o Return to your Local Unit Information Update template to verify the correct address, city, and zip code were entered for the local units listed on the template. If the incorrect address, city, and zip code were entered for any of the local units listed on the template, correct the information, save it to your computer, and repeat steps 3 through 5.

Step 7: If there are no errors, and all entries are marked as "validated" with a check mark, click "Import" to complete the upload process.

Showing 1 to 2 of 2 entries (filtered from 0 total entries)   Previous Next

Validate   Import

In process:

Show 10 ▼ entries   Filter In Process Local Unit Member:

Local Unit	Name	Address	Phone/Fax	Email	Position	Member Id	Message	
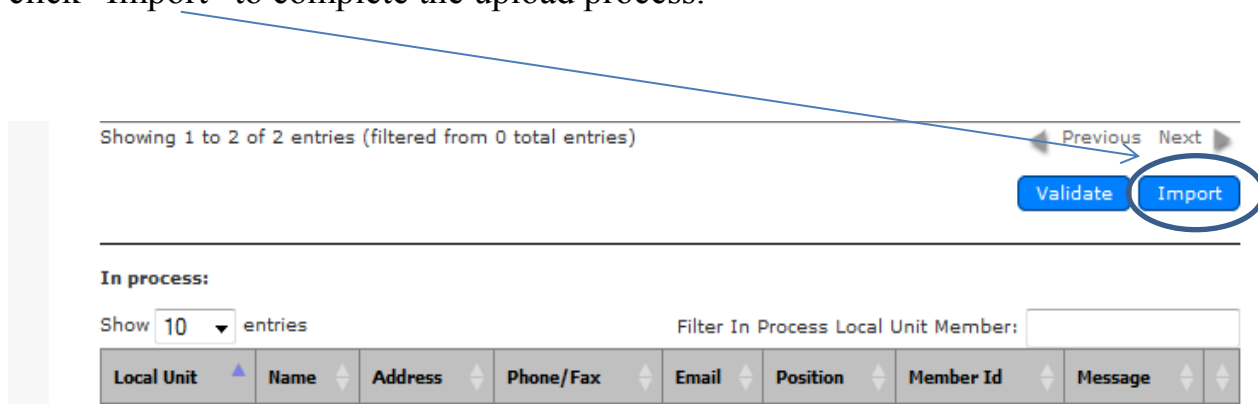
*Note: The changes will not show immediately. We ask that you allow at least 2 hours for the changes to appear.