

ESA Foundation “My Account” User Guide

August 2022

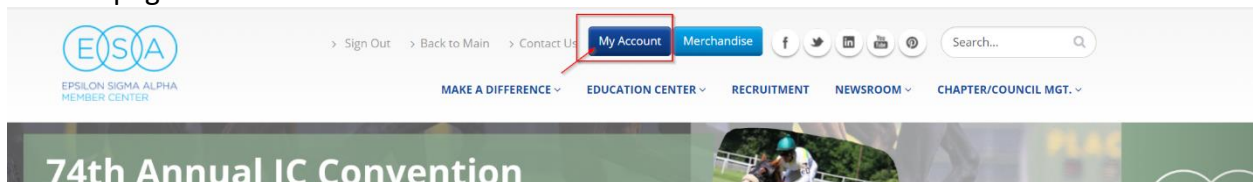
Epsilon Sigma Alpha launched a new My Account portal in February 2021. The My Account portal is the new home base for ESA Foundation donations, memberships, and reports.

The My Account portal offers the ability to pay ESAF dues, join the Foundation, or become a Life Active Member online using a credit card or electronic check, and make an ESA Foundation donation.

Additionally, the portal is the new location for all ESA Foundation reports available to Foundation Counselors.

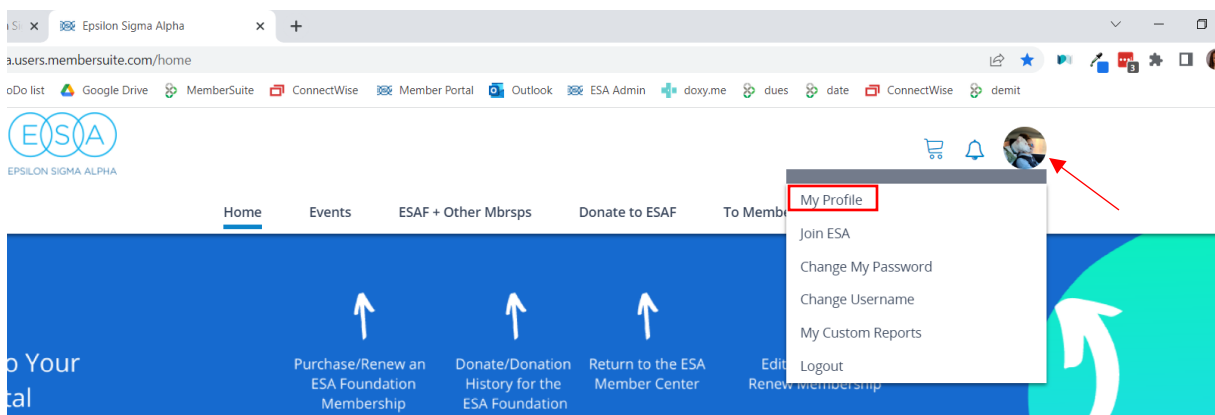
Access the My Account portal

To access the portal from the ESA Member Center homepage, select **My Account** at the top of the webpage.

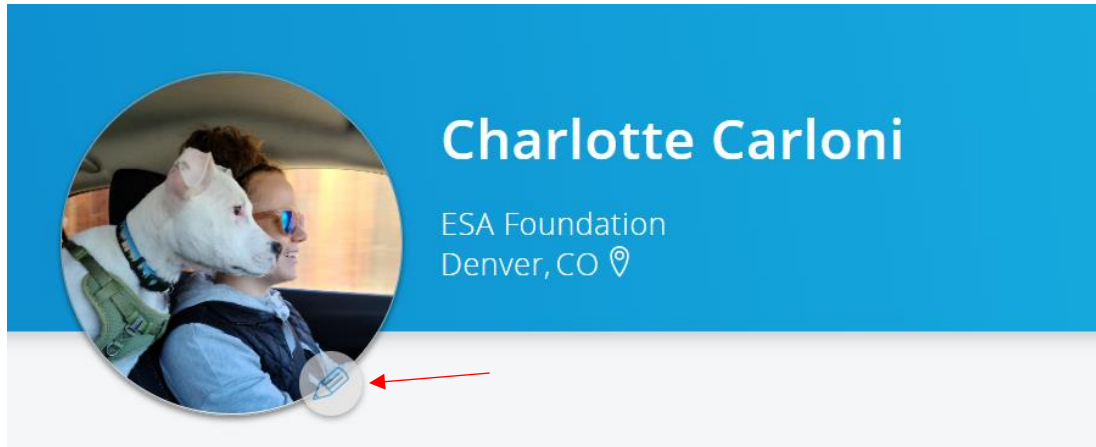


Update your Profile Photo

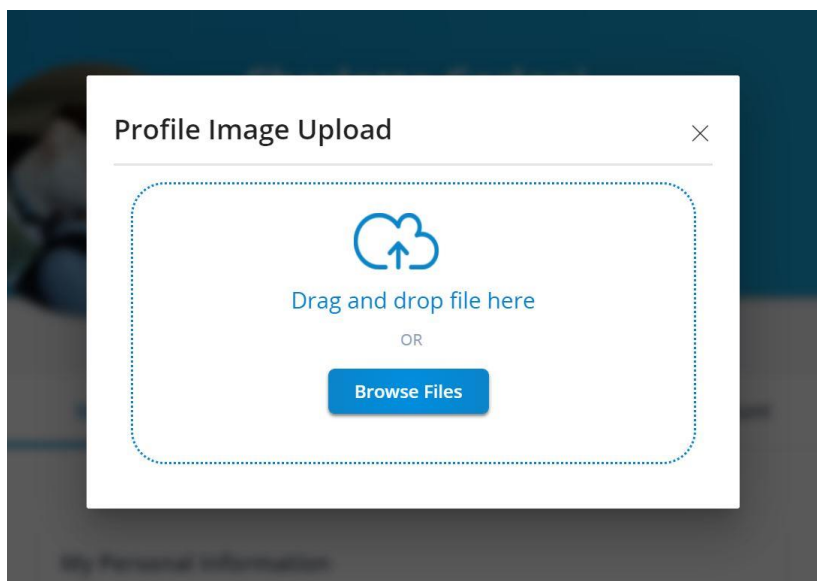
1. From the My Account homepage, select My Profile from the dropdown when clicking the profile icon in the upper right-hand corner of the page.



2. From the My Profile page, click the pencil icon next to the person icon.



3. Clicking on the pencil icon will bring up a box to drag and drop an image, or click Browse Files to open your My Documents. Select the image you would like to display as your profile picture and click Save.

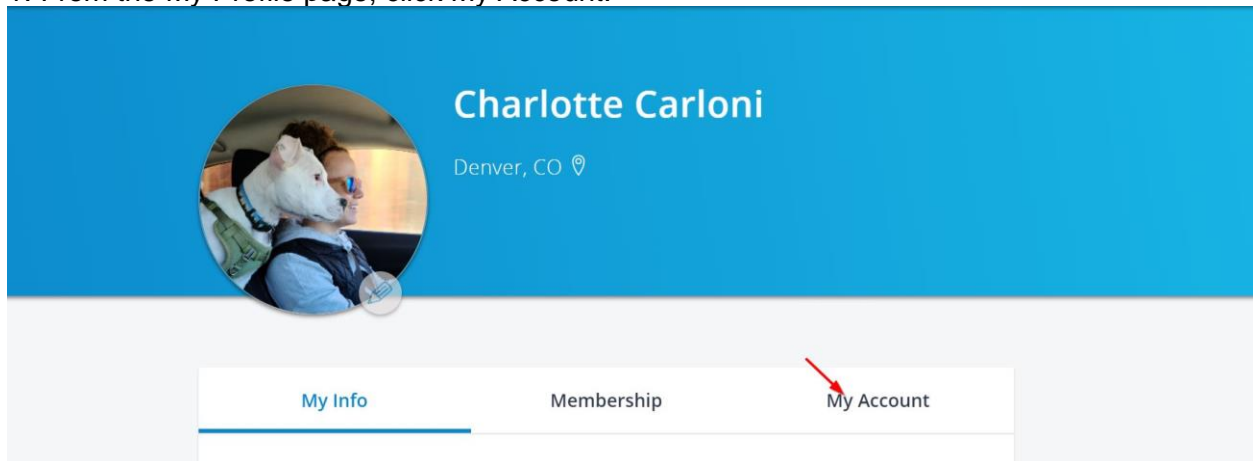


[Click here to watch a video on how to upload your profile photo.](#)

Add a Saved Payment

The new portal allows members to save payment information to make paying dues quicker and easier. You are now able to add either a credit card or ACH/electronic check.

1. From the My Profile page, click My Account.



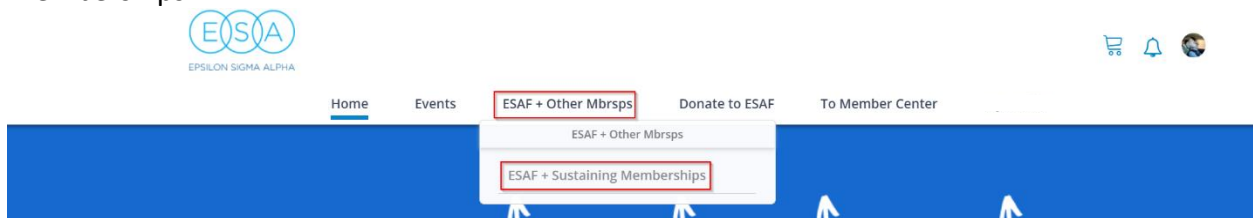
2. Under My Account, click the down arrow next to Saved Payment Options. From here, you can choose to save a credit card/ACH.

[Watch a video on how to save your payment method.](#)

Pay your ESA Foundation Dues

It is simple to pay your ESA Foundation dues online any time of year.


1. From the My Account portal homepage, click “ESAF + Other Mbrsps” and “ESAF + Sustaining Memberships”



2. Select ESA Foundation Renewing Annual Membership for \$15 (or, if you choose, this is where you can become a Life Active Member of the Foundation by selecting ESA Foundation New Life Active Member).

Search

Showing 2 items

Refine 

Categories
All 

Annual Membership

ESIA FOUNDATION™
EPSILON SIGMA ALPHA


ESA Foundation Renewing Annual Membership
\$15.00

Life Active Membership

ESIA FOUNDATION™
EPSILON SIGMA ALPHA

ESA Foundation New Life Active Membership
\$500.00

3. Click Add to Cart.

 [Back to Store](#)

Annual Membership

ESIA FOUNDATION™
EPSILON SIGMA ALPHA

ESA Foundation Renewing Annual Membership

\$15.00


 1 

Add To Cart

4. Click Continue to Cart. Note: the ESA membership is a bundled product, you will see a \$0 price with a \$15 subtotal. This is how we ensure that the payment is marked as a donation in your account. You will see \$15 on the next screen.

Home Events ESAF Membership Donate to ESAF To Member Center My Profile

The following item was added to the cart ✕



ESA Foundation Renewing Annual Membership

Qty: 1

\$0.00

Subtotal (1 Item): **\$15.00**




[Keep Shopping](#) [Continue to Cart →](#)

5. In your cart you will see the \$15 dues tied to the \$0 membership. Click Checkout.

Home Events ESAF Membership Donate to ESAF To Member Center My Profile

My Cart

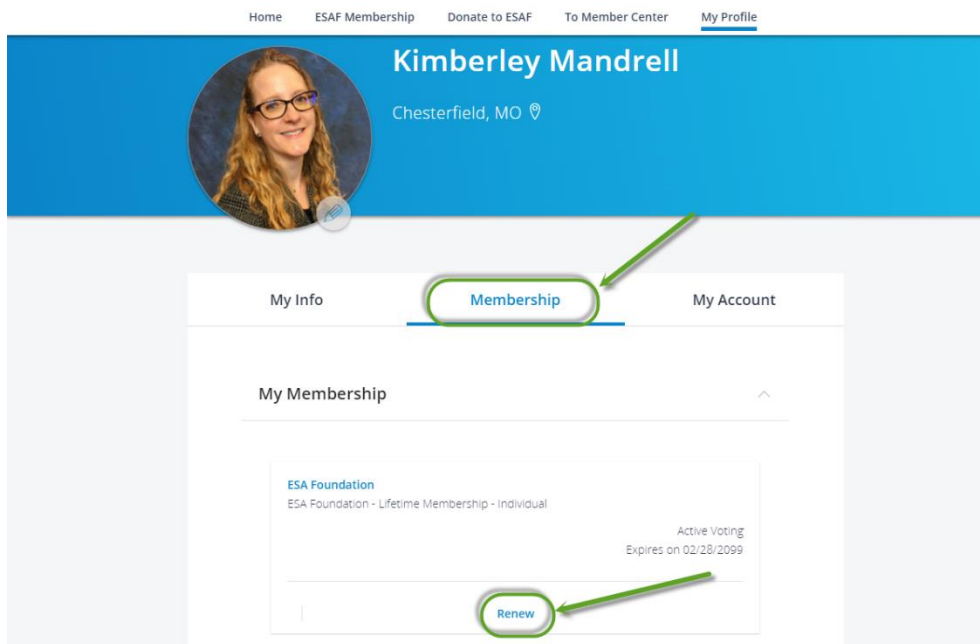
Store

	<p>ESA Foundation Renewing Annual Membership</p> <p style="text-align: center;">- 1 +</p>	<p>\$0.00</p> <p>Remove</p>	
	<p>Annual Dues - Individual</p> <p>Qty:1</p>	<p>\$15.00</p>	
	<p>ESA Foundation - Annual Membership Renewal</p> <p>Qty:1</p>	<p>\$0.00</p>	
<p>Subtotal (1 Item): \$15.00</p>		<p>Checkout</p>	

6. From here you will be brought to the payment screen. Enter your payment information and Checkout and your membership will be renewed.

[Click here to watch a video on how to renew your membership.](#)

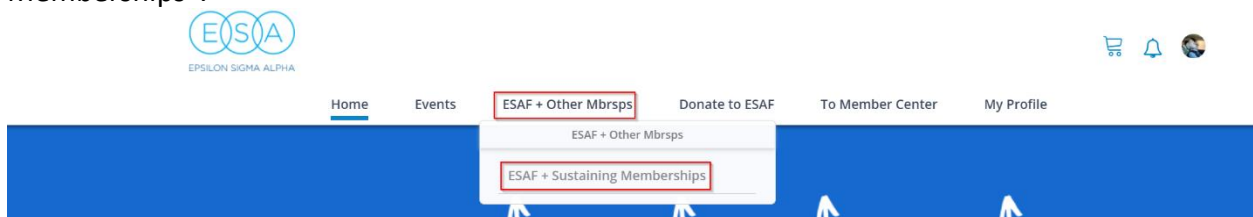
Note: You can also pay your dues by clicking My Profile > Membership > Renew under your ESA Foundation Membership. Steps 2-6 will be the same.



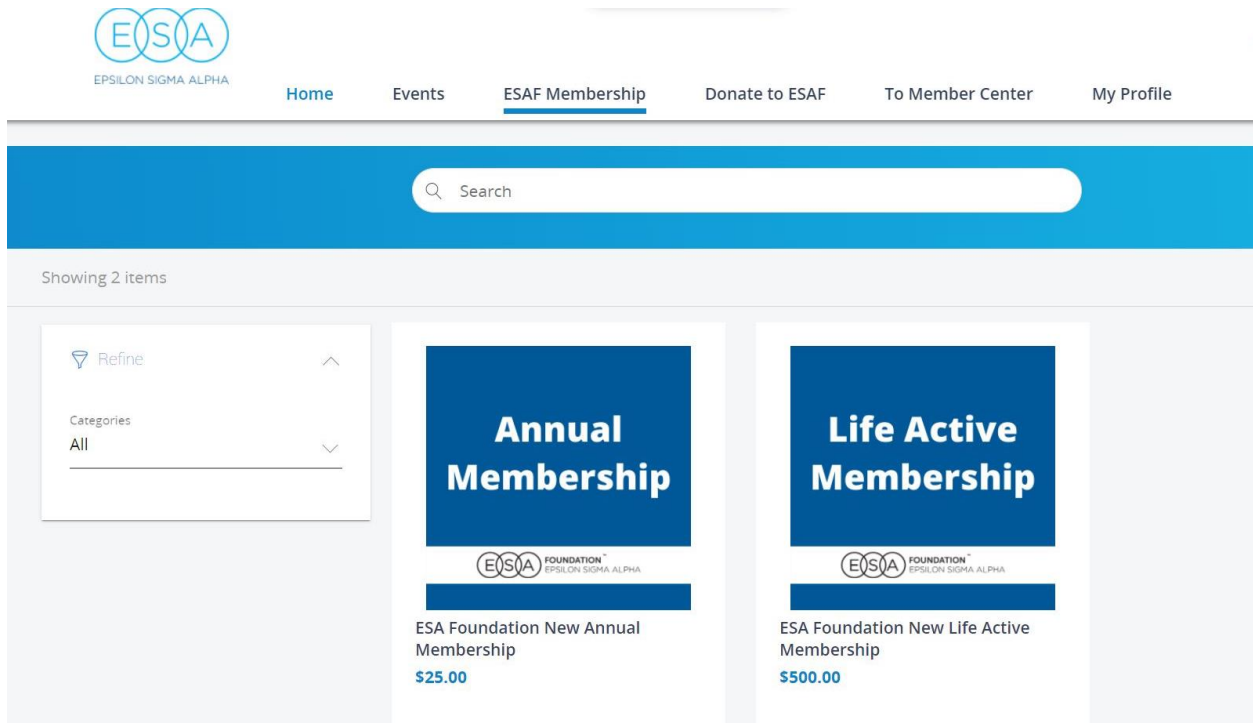
Join the ESA Foundation

Share these steps with any ESA members (or non-ESA members) who are interested in joining the ESA Foundation. Non-members will need to create a profile on the ESA website before they are able to create a membership.

1. From the My Account portal click “ESAF + Other Mbrsps” and “ESAF + Sustaining Memberships”.

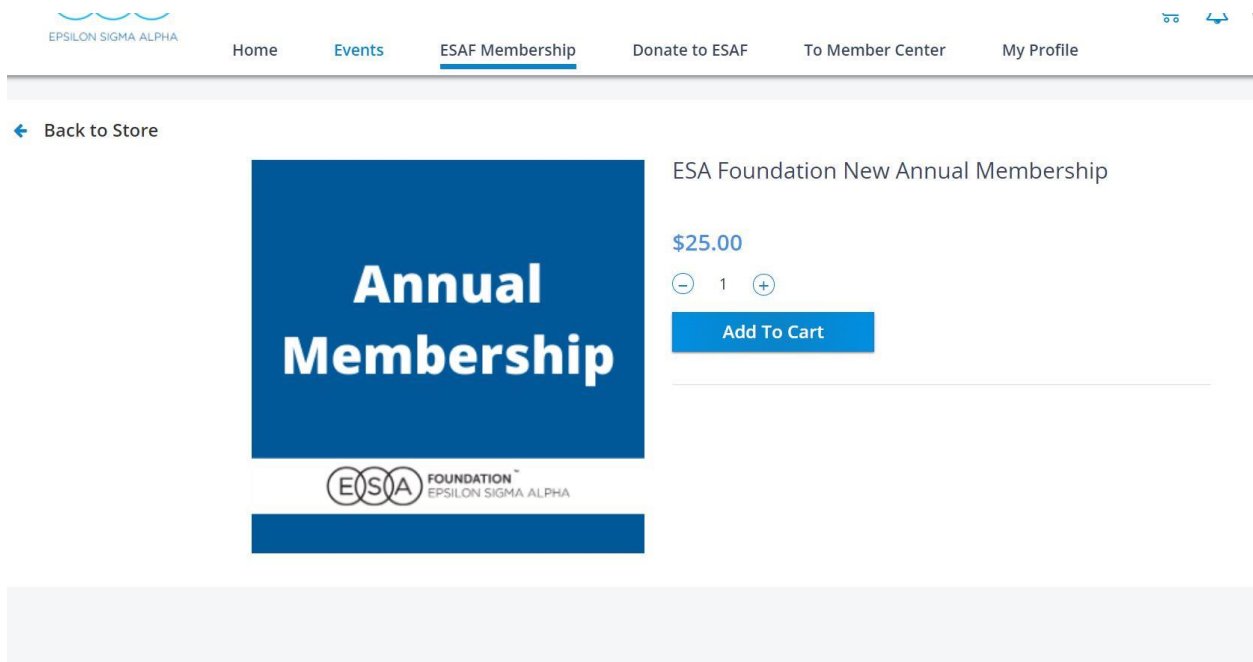


2. Select the membership you are interested in (yearly or Life Active).



The screenshot shows the ESIA website's 'ESAF Membership' page. At the top, there is a navigation bar with links for Home, Events, **ESAF Membership**, Donate to ESAF, To Member Center, and My Profile. Below the navigation bar is a search bar. A section titled 'Showing 2 items' displays two membership cards. The first card is for 'Annual Membership' priced at \$25.00. The second card is for 'Life Active Membership' priced at \$500.00. Both cards feature the ESIA logo and the text 'ESA Foundation New Annual Membership' and 'ESA Foundation New Life Active Membership' respectively. On the left side of the membership cards, there is a 'Refine' section with a dropdown menu for 'Categories' set to 'All'.

3. Click Add to Cart.



The screenshot shows the product detail page for the 'Annual Membership'. At the top, there is a navigation bar with links for Home, Events, **ESAF Membership**, Donate to ESAF, To Member Center, and My Profile. Below the navigation bar is a 'Back to Store' link. The main content area features a large blue card with the text 'Annual Membership' and the ESIA logo. To the right of the card, the product name 'ESA Foundation New Annual Membership' is displayed, along with the price '\$25.00'. Below the price is a quantity selector with a minus sign, the number '1', and a plus sign. A blue 'Add To Cart' button is positioned below the quantity selector.

4. Click Continue to Cart. Note: the ESA membership is a bundled product, you will see a \$0 price with a \$25 subtotal. This is how we ensure that the payment is marked as a donation in your account. You will see \$25 on the next screen.

The following item was added to the cart ×



ESA Foundation New Annual Membership

Qty: 1

\$0.00

Subtotal (1 Item): \$25.00

[Keep Shopping](#)

[Continue to Cart →](#)

5. In your cart you will see the \$25 dues tied to the \$0 membership. Click Checkout.

My Cart

Store



ESA Foundation New Annual Membership

− 1 +

\$0.00

[Remove](#)

Annual Dues - Individual

Qty:1

\$25.00

Bundled Item

ESA Foundation - Annual Membership - Individual

Qty:1

\$0.00

Bundled Item

Subtotal (1 Item): \$25.00

[Checkout](#)

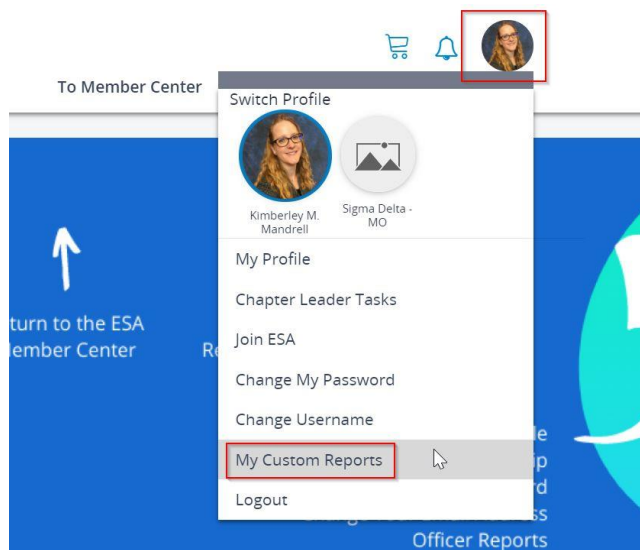
6. From here you will be brought to the payment screen. Enter your payment information and Checkout and the new membership will be created.

[Click here to watch a video on joining the ESA Foundation.](#)

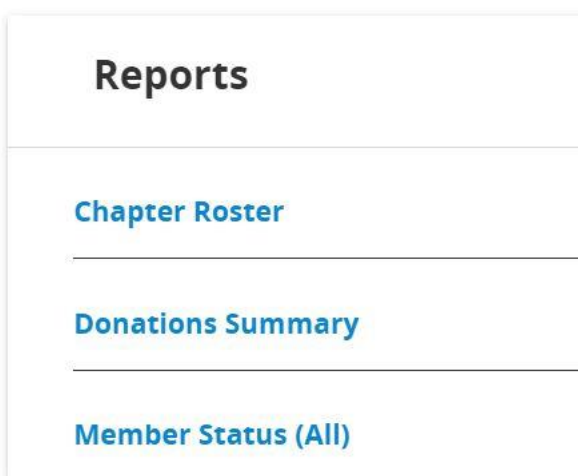
Access and Run ESA Foundation Reports

All ESA Foundation reports are now located in the My Account portal.

1. Click the My Profile icon in the upper right-hand corner of the screen and click My Custom Reports.



2. Select the report you would like to view (note: the chapter roster is only available to chapter presidents and chapter treasurers).



Note for both reports: the reports will show only the state(s) for which you are the counselor. If you are an ESAF counselor for multiple states, you will have a pull-down option to view each of the states where you are the counselor.

Donation Summary: this report is run by a date range. Select the date range you would like to view and click “Enter”. When “hide details” is checked you will only see section totals. When it is unchecked, you will see detail (member name, date, total) for each donation made in your state during that date range.

Start: End: State Council: Hide Details:

Donations By Type and Category

From 06/01/2021 Through 06/30/2021

Member Status: The member status report is run by voting year. Select the year you would like to view and click “Enter”.

State Council: Voting Eligibility Year:

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[Click here to view a video about running ESAF reports.](#)

Getting a PDF of your Reports

Because the reports contain so much data you will be able to email a PDF report to yourself whenever you’d like to have a report to save and share. Remember, you can run and view the report online whenever you want using the instructions above. This is the process to email a PDF.

NOTE: You can also contact Charlotte Carloni if you need help saving a PDF that is too large.

1. Go to the My Custom Reports section and select the report you would like to email to yourself. We will use the Donation Summary for these instructions.
2. Once you are in the report you would like to run, enter the date range, or select the year you would like to view. Hit Enter. Once the information you’d like to access is showing on the screen, click “Save Report” and name the report whatever you’d like. Note: It is recommended that you include the date that you are running the report so it’s easy to find in your list of saved reports.

Start: End: State Council: Hide Details:

Donations By Type and Category

From 02/01/2021 Through 06/30/2021

Dues and Fees

ils: Enter PDF Save Re

Customized Report Name:

Save

3. Once your report is saved, go back to the page that shows the report and click “Bookmarks”. In the box that opens you will see all your saved reports. Find the report you would like to email to yourself and click “Schedule this Report”.

6/30/2021 State Council: Arizona State Council Hide Details: Enter PDF Save Report Bookmarks

By Type and Category

Saved Report	Created	Report Name	Schedule
AZ report 2021	07/29/2021	Donation Summary	Schedule this Report

4. This report schedule was just released by MemberSuite in July Of 2021 and there will be some enhancements coming out over the next few months. Below is the easiest way for you to view and send the report immediately.

To: your email address

Subject: the subject will be populated already, you can leave it as is or change it to something else if you'd like

Body: this is what will display in the body of the email. You can change it if you'd like

Format: leave as PDF

Schedule: leave as Daily

Every: leave as (1) day(s)

Start time: leave as 8:00

Start Date: leave as whatever date is there

End Date: Check “end Date’ and change it to today’s date (if it is August 1st, make the end date August 1st)

Hit “Save Schedule”.

Schedule AZ report 2021



To:

Subject:

Body:

Format:

Schedule:

Every: day(s)

Start Time:

Start Date:

End Date:

Scheduling's current time is 7/29/2021 6:22 PM

5. Close out of the "success" page.

Schedule AZ report 2021



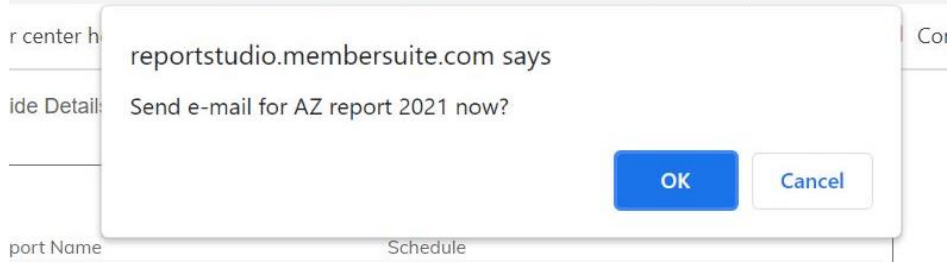
Success! Your report has been scheduled!

6. Back on the Bookmarks screen, click on the schedule you just created.

Saved Report	Created	Report Name	Schedule
AZ report 2021	07/29/2021	Donation Summary	At 8:00 AM every day, ending 07/29/2021

Send email for AZ report 2021 now

7. You will see a popup asking if you'd like to send the report now. Click Yes. Depending on the amount of data in the report it may take up to 10 minutes for the report to be emailed. Once you receive the email from ScheduledReports@membersuite.com, click on the PDF attachment.

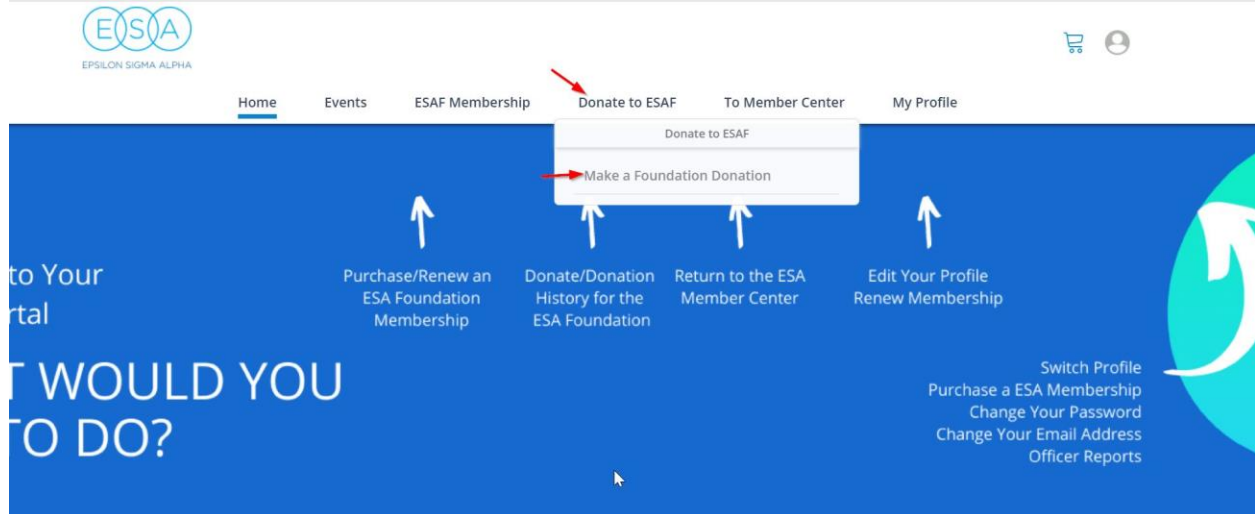


[Click here to watch a video walking through the steps to email a PDF.](#)

Donate to the ESA Foundation

It is now easier than ever to make a donation to the ESA Foundation online. Note: if you want to make multiple donations at once you will need to follow this process for each individual donation.

1. From the My Account homepage, click “Donate to ESAF” and “Make a Foundation Donation”.



2. The page with all the endowments may take a moment to load because there is so much information. Once the page loads find and click on the endowment or fund to which you would like to donate.

Note: Since there is so much info on this page, try using **Ctrl + F** to bring up the search bar. Start typing the name of the endowment you want and you will be brought to it on that page.

Donation Selection Donation Summary

- Kim Kummer's Let Your Life Speak For CASA Endowment
- Kristine Williamson Memorial Endowment
- LaVerne ""Bun"" Young Memorial Endowment
- LaVerne B. Woodard Endowment
- Leora Walton Memorial / Iowa State Council Endowment
- Les and **Rosalee** Echele Family Endowment
- Letha L. Scudder Memorial Endowment
- Linda Moore Memorial Endowment
- Lois E. Carter Teaching Memorial Endowment
- Lucille Eastin Memorial Endowment

3. Once you have selected the endowment or fund, fill out the in honor/in memory of info (if a memorial or honorarium) and your payment card and billing information. Click Continue in the bottom right-hand corner of the screen.


Select Donation Amount:

\$25.00
 \$50.00
 \$100.00
 \$150.00
 \$250.00
 \$500.00

Is this donation In Honor or In Memory of someone?

<p>Billing Address</p> <p>Street 1 * <input type="text"/></p> <p>Street 2 <input type="text"/></p> <p>City * <input type="text"/></p> <p>State * <input type="text"/></p> <p>Zip Code * <input type="text"/></p> <p>Country <input type="text"/></p>	<p>Payment Information</p> <p>Credit Card Number * <input type="text"/></p> <p>Name on Card * <input type="text"/></p> <p>Exp. Month * <input type="text"/></p> <p>Exp. Year * <input type="text"/></p> <p>Sec Code * <input type="text"/></p>
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4. You will be brought to the confirmation page. Click Process Donation.

Perpetual Endowments	Edit
Alaska State Council Endowment	\$25.00
 Remove	
Subtotal: \$25.00	

 [Process Donation](#)

[Click here to watch a video of the ESAF donation process.](#)

Where to go for help

Foundation Counselors can contact Kim Mandrell, Foundation Counselors' Chairman at Kimberley.mandrell@mnk.com / 314-402-0654, or Charlotte Carloni at ESA Headquarters at charlottec@epsilonsigmaalpha.org / 970-223-2824 ext. 5 with questions.