



## Account Set Up Guide

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### **1. Personalize Your Membership Profile**

The volunteer management + service platform provides you with a personalized profile to help you connect with the Pebble Tossers community and share your impact.

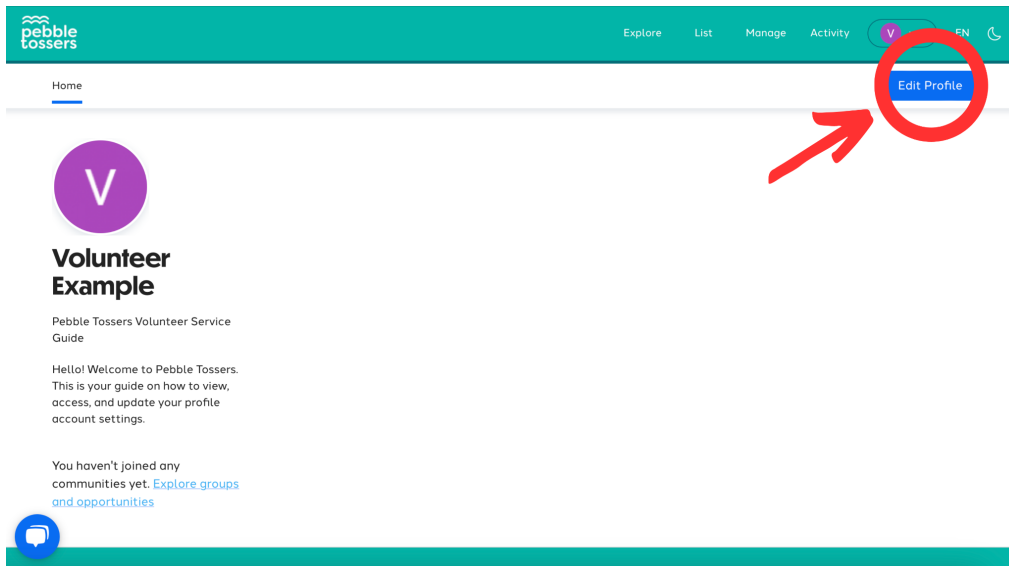
Please watch our [How-To: Account Set Up Guide](#) for an in-depth walkthrough on how you can:

- Access your members' account
- Personalize your profile and account settings
- Add relationships in a family membership
- Customize your cause area interests
- Review and update your payment settings

View your profile by clicking the profile icon at the top right and find **PROFILE**.

## Privacy Settings

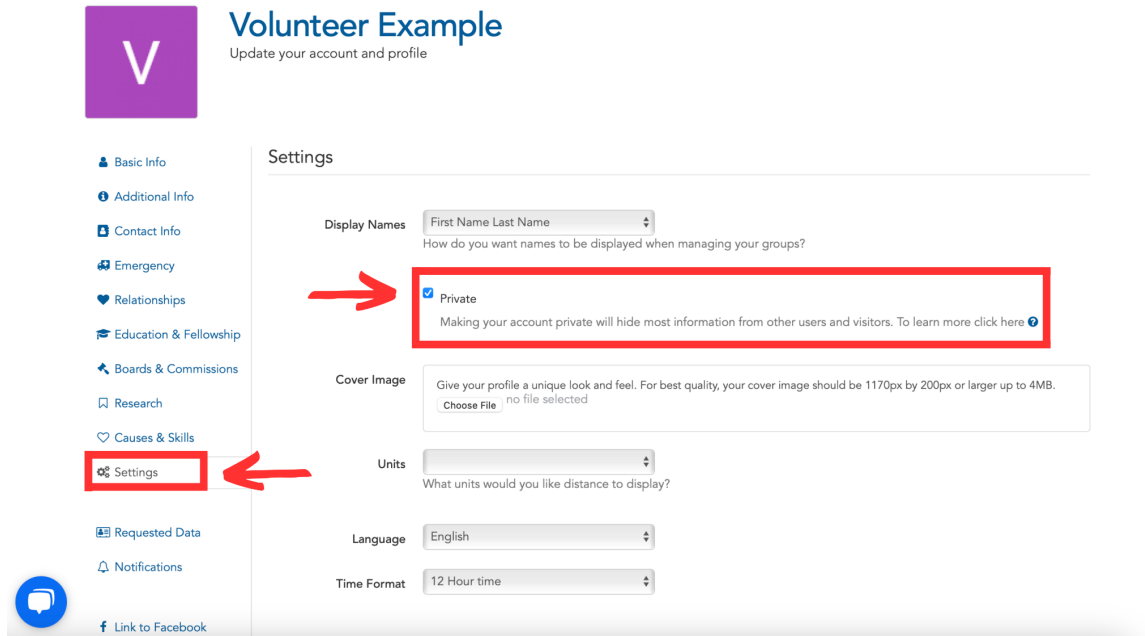
Your profile is where you can personalize your interests and share your community impact. Your profile and community impact are made viewable to fellow Pebble Tossers community members when your profile is set to **PUBLIC**. To change your profile settings, click on **EDIT PROFILE**.



A **PUBLIC** profile means that your icon, name, group associations, and other optional profile additions like your introductory bio and occupation, are visible to fellow Pebble Tossers community members **exclusively**. No one outside of the Pebble Tossers community will be able to access any information about Pebble Tossers members and other private information locked behind the membership.

You have the option to make your profile **PRIVATE**, where only you, your relationships (if you are part of a family membership plan), group members you're associated with, and Pebble Tossers administrative staff can identify you and view your profile and community impact. No other members will be able to access your profile.

Find the **SETTINGS** tab located in the left menu. Check the **PRIVATE** box to make your profile exclusive, or uncheck the box to make your profile and community impact public.



## Additional Account Information

You can update the rest of your profile and add additional information under the menu located at the left side of the screen.

The additional information includes:

- Demographic information
- Personal + Emergency Contact Information
- Education & fellowship
- Relationships within a Family Membership
- Cause Interests + Skills

**Please Note:** This additional information will not be visible on your profile, and can only be accessed by yourself and Pebble Tossers administrative staff. Pebble Tossers needs to know demographic information, such as race and gender, for grant reporting purposes. Any data shared with funders will be made anonymous and used collectively.

If you are part of a subgroup, such as our Teen Leadership Program, you can add additional information as requested by your subgroup in the **REQUESTED DATA** tab.

This screenshot shows the 'Basic Profile Information' page. On the left, a sidebar contains a list of menu items: Basic Info, Additional Info, Contact Info, Emergency, Relationships, Education & Fellowship, Boards & Commissions, Research, Causes & Skills, Settings, Requested Data, Notifications, Link to Facebook, Change Password, Merge Accounts, Switch to New View, and Payment Settings. A red box highlights the first six items, and another red box highlights 'Requested Data'. A red arrow points from the 'Requested Data' box to the 'Relationships' menu item. The main content area includes a profile image placeholder with a 'V' logo, a 'Prefix' dropdown, and text input fields for 'First Name', 'Middle Name', 'Last Name', and 'Preferred First Name'. A checkbox for 'Use Preferred First Name instead of Legal Name On Public Pages' is checked. An 'About' section contains a text area with a welcome message. In the top right corner, there are 'QR Code' and 'View Profile' buttons.

## 2. Add + Manage Relationships

If you are part of a Family Membership plan, you can update and manage all of your existing relationships through the **RELATIONSHIPS** tab found in the account settings.

This screenshot shows the 'Relationships' page. The top header features the 'pebble tossers' logo and navigation links for 'English', 'Explore', 'My Activity', and a user profile 'Hi Volunteer'. The main header area displays a 'Volunteer Example' profile with a 'V' logo and a prompt to 'Update your account and profile'. The left sidebar is identical to the previous screenshot, with a red box around 'Requested Data' and a red arrow pointing to 'Relationships'. The 'Relationships' section on the right includes an 'Add Relationship' button, which is highlighted with a red box and a red arrow. Below this is a table with columns: First Name, Last Name, Birthday, Email, Num Hours, Num Impacts, Relationship, Minor, Status, Switch, and Actions. The table is currently empty, with a message: 'Currently Empty : Filters may be applied. Clear filters here'.

## Add Relations

Add a relationship by filling in the appropriate information, including their name, email address, and relationship to you. The relation will receive an email from Pebble Tossers asking them to confirm their relation to you. They must **APPROVE** the relation for you to manage their account.

**Please Note:** All accounts must have an unique email address. Minors are not required to have an email address, however the system will create a “**placeholder email**” to satisfy this requirement. It is recommended to create an email account for your minor that forwards to your email address.

**An example is for gmail accounts:** [yourname@gmail.com](#) can serve as the parent email and emails sent to [yourname+childname@gmail.com](#) will forward to the parent email. For details on this gmail function, please [click here](#).

Add Relationship

×

First Name \*

Last Name \*

Email \*

Hint: Auto-generated email can be replaced

Date of Birth

Relationship To Me

✓ Parent

Child

Guardian

Dependent

Submit

Close

## Manage Relations

After they approve the relation, you or your added relation will be able to set up their own account. You can manage all added relations to your family membership by switching users.

The screenshot shows the 'Volunteer Example' profile page. The left sidebar contains navigation links: Basic Info, Additional Info, Contact Info, Emergency, Relationships (selected), Education & Fellowship, Boards & Commissions, Research, Causes & Skills, Settings, and Requested Data. The main content area is titled 'Relationships' and includes an 'Add Relationship' button. Below this is a table with columns: First Name, Last Name, Birthday, Email, Num Hours, Num Impacts, Relationship, Minor, Status, Switch, and Actions. The table lists one relationship: 'Volunteer Dependent' with 'Example' as the last name, '0.00' hours, '0' impacts, 'Dependent' relationship, 'No' minor status, and 'Approved' status. The 'Switch' column for this row contains a 'Switch to User' button, which is highlighted with a red box and a red arrow. The 'Actions' column contains a trash icon.

First Name	Last Name	Birthday	Email	Num Hours	Num Impacts	Relationship	Minor	Status	Switch	Actions
	Example			0.00	0	Dependent	No	Approved	Switch to User	

Your management of added relations includes full access to:

- Profile information
- Account settings
- Service Projects
- Community Impact + Impact Summary
- Personal Dashboard

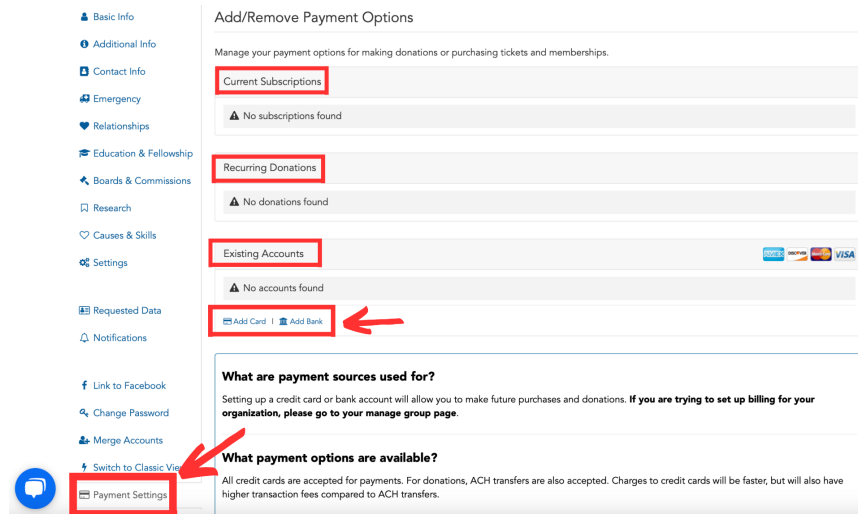
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## 3. Payment Settings

As a member, you can view and update your membership plan, view any monetary donations made to Pebble Tossers, and update your payment details under the **PAYMENT SETTINGS** tab.

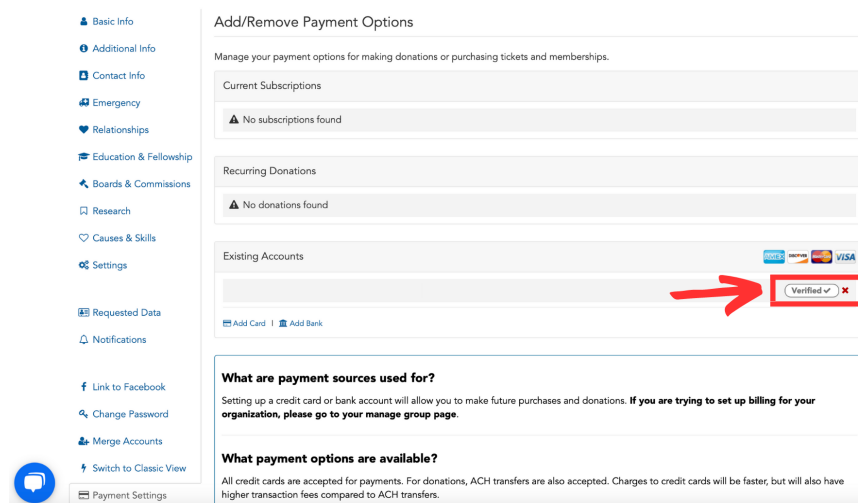
Your payment details are secured through the payment processor, Stripe, and no one from Pebble Tossers has access to this information. To learn more about Stripe, [click here](#).

**Please Note:** If you need to cancel your automatic membership renewal, please send an email to [membership@pebbletossers.org](mailto:membership@pebbletossers.org) at least one week prior to your renewal date.



## Update Payment Details

If you need to update your payment details under an existing membership, click the **RED X** displayed next to the **VERIFIED MARK** located under the **EXISTING ACCOUNTS** section. You will see a pop-up on your screen asking you to confirm the removal.



## Add New Payment Details

Click on the **ADD CARD** or **ADD BANK** options highlighted under **EXISTING ACCOUNTS** and fill in the appropriate information.

Clicking **ADD** at the bottom of this section confirms your updated payment details. All future payments on your account will be made through the updated payment details.

Existing Accounts

AMERDISCOVERMasterCardVISA

⚠ No accounts found

[Add Card](#) | [Add Bank](#)

**Add New Card**

**Name \***

**Billing Address \***

**Credit Card Info \***



## 4. Pebble Tossers Direct Messaging

You can send messages to Pebble Tossers staff via the volunteer management + service platform. Pebble Tossers staff can also send messages to our members regarding important updates and opportunities.

You cannot message other members, nor can other members or anyone outside of the Pebble Tossers community be able to message you. This feature is solely between you and Pebble Tossers staff to directly communicate with one another when necessary.

