



HEVREH MEMBER PORTAL ON SHULCLOUD

User Guide

All Hevreh members have access to the online member portal, hosted by ShulCloud.

WHAT IS ShulCloud? ShulCloud is an online synagogue membership management software program. This system was created to directly serve synagogues and their members' unique needs. It was designed by a synagogue, and is used by over 1,600 synagogues across North America, Europe and Australia.

WHAT ARE THE BENEFITS OF ShulCloud?

- Gives our members easy access to their own information and to an online membership directory. With a few clicks of your mouse, you will be able to manage, update and view detailed information within your account.
- Provides a newly designed website that includes an expanded calendar to keep up on Hevreh's activities.
- Provides a way to make donations, and to sign up for Hevreh events.
- Merges Hevreh's administrative functions into one easy to use database that interacts with our accounting system.

We are very excited to engage each member of our community with this system. We encourage you to login and familiarize yourself with your account and the functions of ShulCloud.

If you have any challenges or questions, please do not hesitate to email or call the Hevreh office at info@hevreh.org or 413-528-6378.

INTRODUCING SHULCLOUD

WHAT CAN I DO IN MY ShulCloud ACCOUNT?

At any time, you will be able to do the following:

- View the Online Membership Directory
- Update your personal information
 - Update your family information
 - Update Lifecycle information
 - Edit, change, add, or delete your address(es)
 - Add and keep track of your family's Yahrzeits
- View and modify your financial information
 - Make Payments and Donations
 - Change Payment Methods/charge cards
 - View your transactions, statements, current balance, and recurring Payments plan
- Register for Hevreh Events
- Minimize paper forms
- Upload a photo to your personal account (*if you so choose*)

HOW DO I GET STARTED?

The email you received includes a login link to Hevreh's ShulCloud membership portal. Click on the link, and follow the guide below to review and update your membership information. Please see the email example on the next page

EMAIL INVITATION TO LOGIN

Each member will receive a personalized email invitation to login to Hevreh's Member Portal by ShulCloud. Click on the link that says **"temporary Set Password link"** to start the login process.

Dear Sarah,

We are very excited to introduce Hevreh's new online member portal hosted by ShulCloud. Hevreh has been using Shul Cloud for over two years to manage membership, donations, yahrzeits, payments and more. We are pleased to give you access to this system to better serve your member needs and to streamline and improve our processes.

This system will give you easy access to your member information and to do the following:

- manage, update and view detailed information within your account.
- make and setup payments online (with a credit card or ACH)
- make donations easily sign up and pay for events (if required) seamlessly.

We encourage you to log in and familiarize yourself with the member portal and update your information. In particular, please review your contact information (phone and addresses), update birthday and yahrzeits, and set your preference for the membership directory.

Here is what you need to do to login:

1. Click this [temporary Set Password link](#) to set your new personal Hevreh member password (your email address is your user name). Each adult member will be able to set up their own access.
2. Click the [MY ACCOUNT](#) tab (top right) to reach the member portal menu
3. Click the [My Profile](#) tile to verify and edit your profile information.
4. Click the [My Family](#) tile to verify and edit your family information.
5. Click the [Edit My Directory Listing](#) tile to change your directory information and set display and sharing preferences. The directory is accessible to all members.
6. Upload a photo of the adult members of your family (recommended).

[Click here](#) to access the ShulCloud Member Portal page on Hevreh's website for FAQs, a PDF User Guide and links to several video tutorials – both with step-by-step instructions on how to login, review your information, and navigate the member portal on ShulCloud.

We appreciate your participation and patience as we roll out this new software. Our staff will provide support over the next few months to help congregants learn to navigate the new system. If you have difficulty logging in or have questions, please contact info@hevreh.org or call [\(413\) 528-6378](tel:4135286378).

Sincerely,

Joan Goldberg Munch
Executive Director


Shira Nichaman
VP of Finance

Josh Briggs
VP of Membership

SETTING YOUR PASSWORD

Powered By ShulCloud Welcome Shira Test Account ▾

[HOME](#) [DONATE](#)

 [OUR WEBSITE](#) [HOME](#) [CONTACT US](#) [MY ACCOUNT ▾](#) [DONATE](#)

Set Password

Please enter a password below to finish setting up your account.

New Password *(Min 8 Characters)*:

Confirm Password:

Use this screen to:

1. Create your Password (You will be able to change it later if needed).
2. Confirm your Password.
3. Click on the “Set Password” button.

Note: The email address used is the one that you had previously provided to Hevreh. You may change your email address if needed in your profile. If you even need or wish to reset your password, you may do so from the MY ACCOUNT menu.

After you click on Set Password, you will be taken to the “Login Info Screen”.

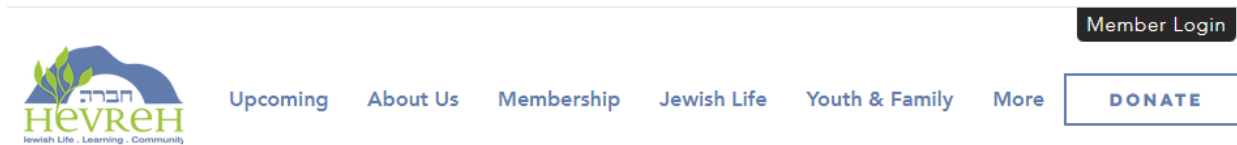
LOGGING IN & PASSWORD MANAGEMENT

HOW TO LOGIN TO YOUR HEVREH ACCOUNT

After the initial setup as described above:

1. Go to the Hevreh member portal website <https://hevreh.shulcloud.com>
2. At the top right corner click on the **Login** button.
3. Enter your email address and password.
4. Click Sign In.

You can also click the **Member Login** button at the top right of the Hevreh website.



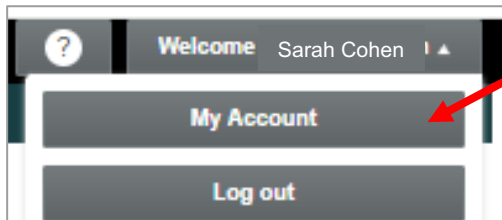
FORGOT YOUR SHULCLOUD PASSWORD? - HOW TO RESET

1. Go to the Hevreh member portal website <https://hevreh.shulcloud.com>
2. At the top right corner click on the **Login** button.
3. Click Forgot Password.
4. Enter your email address (the one that the synagogue has on file for you).
5. Click Email Password.
6. Hevreh/ShulCloud will send you an email. Open and click the “Reset Your Password” Login Link.
7. Enter a new password, enter again to confirm.
8. Click Save Password. You will then be logged into your Hevreh account.

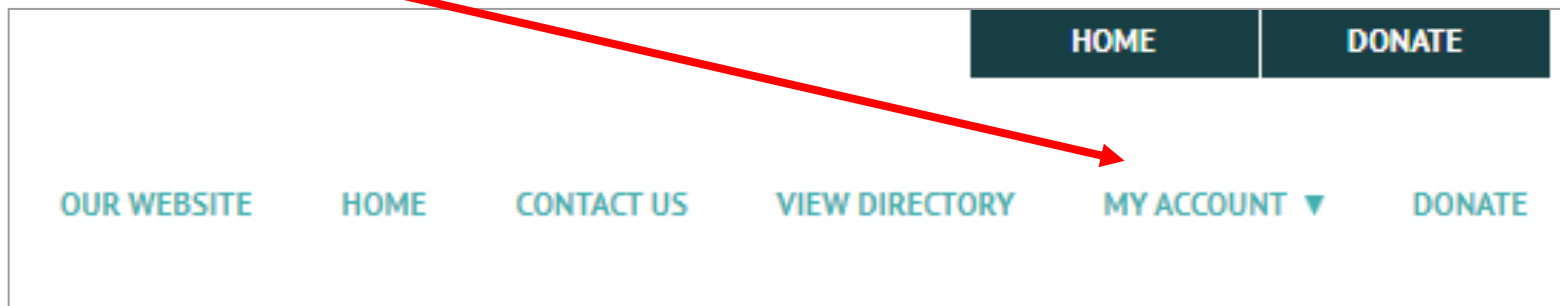
NAVIGATING SHULCLOUD – MY ACCOUNT

Now that you are logged into your Hevreh account, click on the MY ACCOUNT. You can do this in two ways:

1. If you are logged in, it should say "**Welcome [Your Name]**" in the top right corner of the website. Click it, and then Click on "**MY ACCOUNT**" where you will be able to update any information.



2. Or Click on **MY ACCOUNT** from the tabs across the top.



MY ACCOUNT – TILE MENU

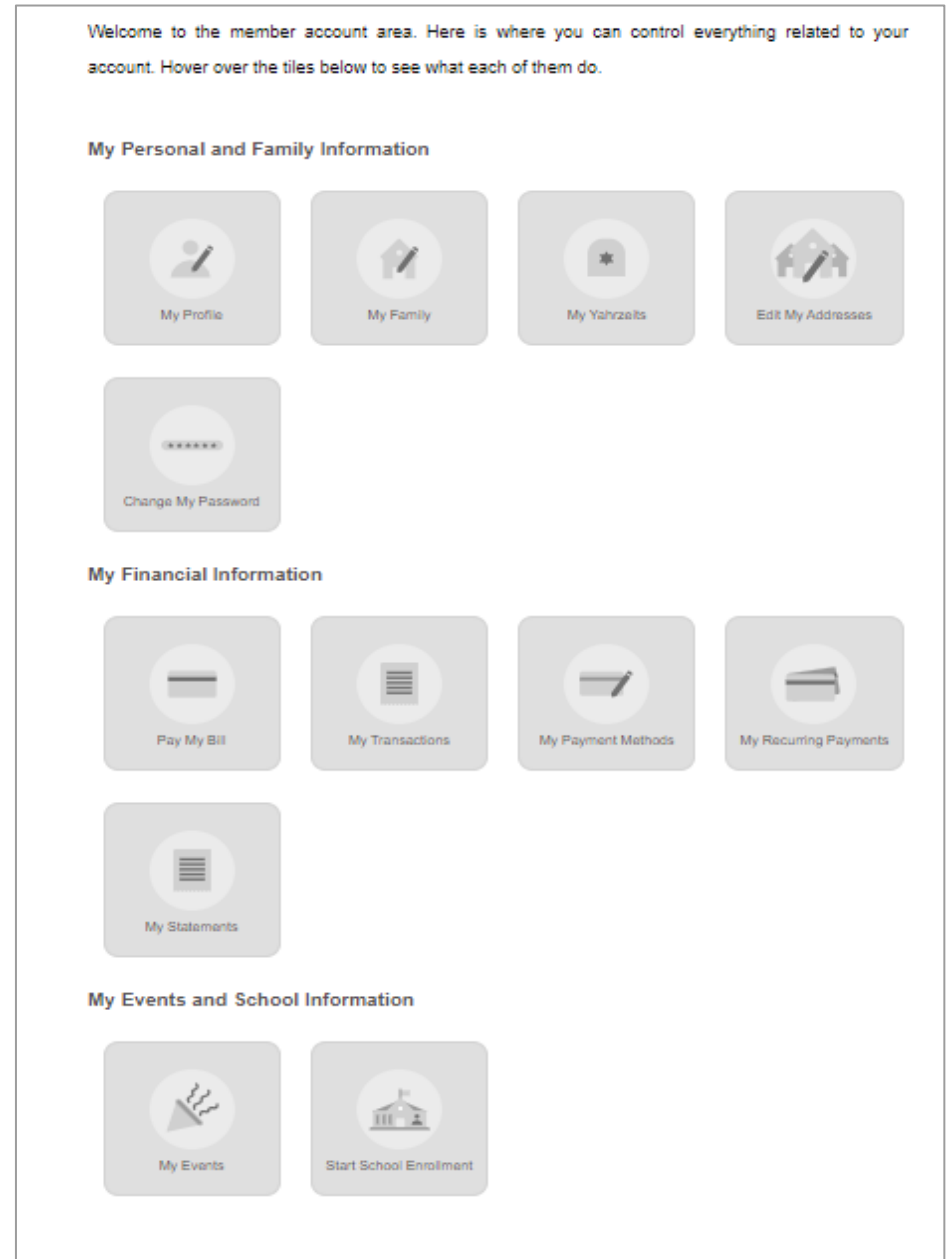
In the **MY ACCOUNT** section you will find a tile menu that will help you navigate the different sections in your account.

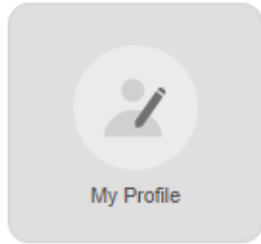
From the tile menu, select the areas you would like to review to update or add information.

Use this screen to:

1. Fill in any information you wish to have included in your account. All information is private and secure.
2. Click on the other tiles to enter additional information. On these screens you can make changes to your ShulCloud password, address, phone number, email address, etc.

Don't forget to click on the "Save Changes" button at the bottom of each page once you have entered/updated your information.





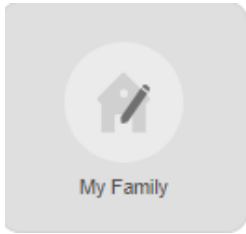
PERSONAL PROFILE & PHOTO

HOW TO UPDATE YOUR PERSONAL PROFILE INFORMATION

1. Click the **My Account** menu option.
2. Click on **My Profile**.
3. Click on **View & edit your profile**.
4. Proceed to edit the various tabs at the top of the page; Personal, Contact Info, and Lifecycle (Birthdays!) – these are the tabs across the top.
5. Click **Save Changes to Person** at the bottom of the Person page.
6. Click on **My Account** at the top of the page to return to the tile menu page.

If YOU CHOOSE TO UPLOAD A PHOTO TO YOUR PERSONAL ACCOUNT


1. Click on the **My Account** menu option.
2. Click on **My Profile**.
3. Click on **View & edit your profile**.
4. At the bottom of the personal page it says '**Picture**' click on Choose File.
5. Select a picture from your computer and upload it.
6. Click **Save Changes to Person** at the bottom of the Person page.
7. Click on **My Account** at the top of the page to return to the tile menu page.




FAMILY INFORMATION

HOW TO UPDATE YOUR FAMILY INFORMATION

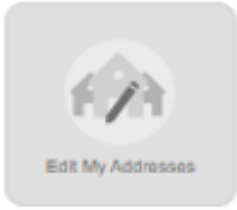
My Family

Name (click to edit)	Email	Person Type
 Sarah Cohen	scohen@gmail.com	Heads of Household
Ben Cohen	bcohen@gmail.com	Heads of Household
Hannah Cohen	hcohen@gmail.com	Child
Abbe Cohen	acohen@gmail.com	Child

 indicates primary contact.

[Edit your family](#) [+ Add Person](#)

1. Click on the **My Account** menu option.
2. Click on **My Family**.
3. Click on **Edit your family**.
4. Choose to edit Adults, Children, More Info (to enter your Marital Status), and Emergency Contact information by clicking on the appropriate tabs at the top of the My Family Edit page.
5. Click **Save Changes to Account** at the bottom of the page.
6. Click on **My Account** at the top of the page to return to the tile menu page.



ADDRESS INFORMATION

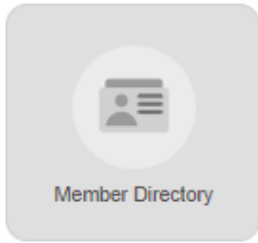
[HOW TO CHANGE, ADD, OR DELETE YOUR ADDRESS](#)

1. Click on the **My Account** menu option
2. Click **Edit My Addresses**
3. On the Edit My Address page, click **Edit Address**.
4. Click on the Address label and make all necessary changes to your current address.

Note: Be sure to indicate which is your primary, mailing, or physical address. If you have more than one residence, please indicate when you are in each location.

A screenshot of a web interface for editing addresses. At the top left is a button with a left arrow and the text "Return to My Account Menu". Below it is the heading "Edit My Addresses - Edit". The main content area has a light gray background and contains the instruction "(Click on an address to edit.)" on the left and a button with a plus sign and the text "Add New Address" on the right. In the center, there is a rounded rectangular box labeled "Address 1" containing the following text: "Sarah & Ben Cohen", "158 Main Street", "Great Barrington, MA", "United States", "01230", and "Phone: 413-563-8765". Below this box is a horizontal line. Underneath the line, on the left, is the text "Billing Preferred Delivery Method" followed by a dropdown menu showing "Email". On the bottom right of the page is a blue button with a floppy disk icon and the text "Save Changes to Addresses".

5. Click **Done** when finished.
6. If you wish to add a new address, click **+Add New Address** at the top right corner. Enter all the address details and click Done.
7. Click **Save Changes to Addresses** at bottom of the page.
8. Click on **My Account** at the top of the page to return to the tile menu page.



MEMBER DIRECTORY

Who can see my information in the online Membership Directory?



The Membership Directory lists all of Hevreh's current members.

Hevreh's membership directory information is accessible only to Hevreh members and staff.

As a member you may also choose to **not** be included in the membership directory. Click on the **Edit My Directory Listing** tile (click on the tile from the MY ACCOUNT page) to hide or unhide your information, and then Save Changes at the bottom of the screen.

Member Directory - Edit
View the member directory

Current Directory Listing

	Sarah Cohen Home 413-563-8765 scohen@gmail.com 158 Main Street Great Barrington, MA 01230 Phone at address: 413-563-8765	Ben Cohen Home 413-563-8765 bcohen@gmail.com Hannah Cohen, Abbe Cohen	
---	--	---	---

[Show All Info](#)

Change Directory Listing

Show Account	<input checked="" type="radio"/> Yes, Show <input type="radio"/> No, Hide my account from the directory
Picture	No Picture Upload a file
Address	<input checked="" type="radio"/> Yes, Show <input type="radio"/> No, Hide my address from the directory
Phone	<input checked="" type="radio"/> Yes, Show <input type="radio"/> No, Hide my phone from the directory

Person	Show	Work Email	Email
Sarah Cohen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ben Cohen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hannah Cohen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A
Abbe Cohen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A

[Save Changes](#)

PAYMENTS USING YOUR ACCOUNT

CAN I USE SHULCLOUD TO MAKE DONATIONS OR PAYMENTS?

YES. You will be able to make donations and payments directly from the website as well as direct where you would like your funds to be applied. Payments can be made via credit card or via an ACH/eCheck drawn on your bank account

DO I HAVE TO MAKE ALL PAYMENTS VIA SHULCLOUD?

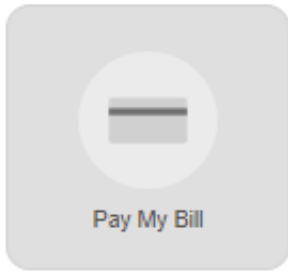
NO. You will also be able to use your bank's online bill pay option, or you can always mail a paper check made out to "**Hevreh of Southern Berkshire**".

IS MY CREDIT CARD AND BANK INFORMATION ON FILE SECURE?

YES. Your personal and financial information is secure. ShulCloud uses a third-party payment processor, and all payments transactions are encrypted. The only people who can see your financial information are you and the Hevreh administrative staff. The administrative staff cannot see your specific credit card or bank information.

1. HOW DO I PAY BY CREDIT CARD OR BANK INFORMATION ON FILE?

If you have a credit card or bank information on file, when you get to the **payment page**, select "**Pay by Credit Card**" or "**Pay by eCheck**" and then select your credit card or eCheck/bank information.

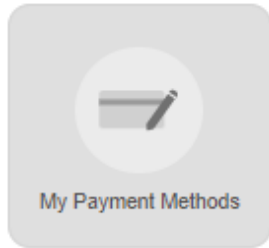


HOW TO MAKE AN ACCOUNT PAYMENT

A screenshot of the "Online Payments" form on the Hevreh website. The form includes a navigation bar at the top with links for "OUR WEBSITE", "HOME", "CONTACT US", "VIEW DIRECTORY", "MY ACCOUNT", and "DONATE". The main heading is "Online Payments". The form fields include: "Paying as" (Saran and Ben Cohen), "3rd Party Payer" (Third Party Account), "Payment is" (radio buttons for "for account balance" and "a donation"), "Paying For" (Date: 07/01/2024, Description: Community Commitment FY 2024-25, Unpaid checkbox), "Amount" (\$ 2700.00), "Pay this amount" (dropdown menu set to "Once Now"), and "Payment Notes" (text area). A "CONTINUE TO PAYMENT" button is at the bottom.

1. Click on the **My Account** menu option.
2. Click the **My Billing** tile and from the next page select **Payment is “for account balance”**
3. To pay your current account balance click on **Pay this amount** to select the amount and how you would like to pay – from the dropdown choose to either make a one-time payment or to set up a recurring payment. If setting up a recurring payment, choose the number of months over which you wish to split the payments (please select no more than nine (9) as all payments for fees are due by the end of March for each fiscal year).
4. Click on **CONTINUE TO PAYMENT** to be taken to the Online Payments page.
5. Click on **My Account** at the top of the page to return to the tile menu page.

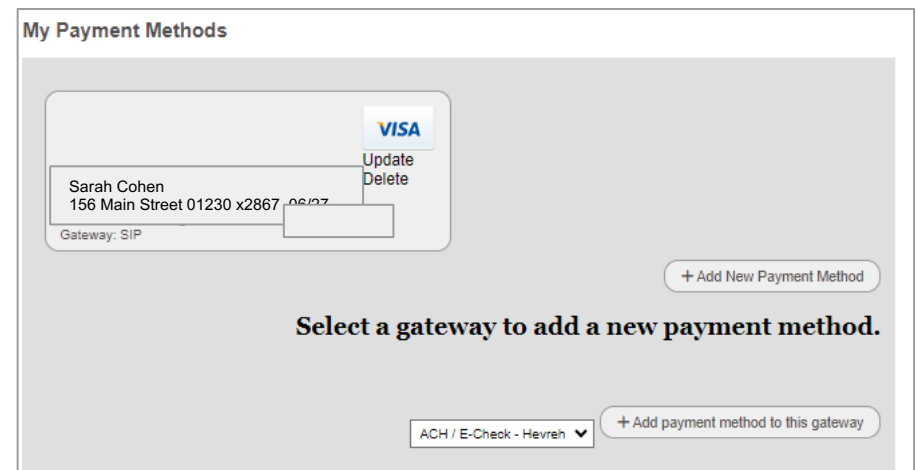
To make a donation, follow the same process and select **Payment is “a donation”** instead.

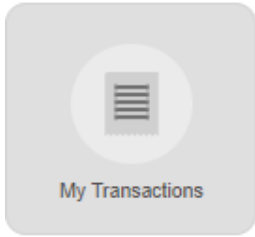


Payment Methods

[HOW TO ADD/REMOVE A CREDIT CARD OR ACH/ECHECK FROM YOUR ACCOUNT](#)

1. Click on the **My Account** tab.
2. Click on the **My Payment Methods** tile.
3. If you already have a payment method saved you will see it displayed; click **Update** if you need to make changes or **Delete** if you need to remove.
4. To add a credit card or eCheck (bank) account, click the Add New Payment Method button at the bottom right corner of the page.
5. Select whether you wish to add a credit card or eCheck (i.e., bank) account in the drop down; select either **ACH/E-Check - Hevreh** or **Credit Card – Hevreh**.
6. Click “**+Add payment method to this gateway**”.
7. Enter your credit card or eCheck/bank information and confirm your contact information. Hevreh does **not** store your credit card or eCheck information. **Only the last 4 digits and expiration date of the card** are kept in the ShulCloud system.
8. Click Save Payment Method at the bottom of the page.
9. Click on **My Account** at the top of the page to return to the tile menu page.





VIEW YOUR TRANSACTION HISTORY

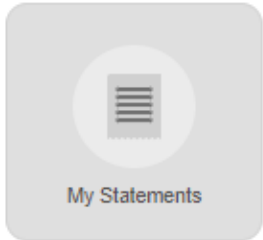
[HOW TO VIEW YOUR FINANCIAL HISTORY AND SEE YOUR CURRENT BALANCE](#)

1. Click on the **My Account** tab.
2. Click on the **My Transactions** tile.
3. At the top of the next page you will see your current account balance.
4. To pay your current account balance click on Submit A Payment.
5. Further down the page you will see your recent transactions.



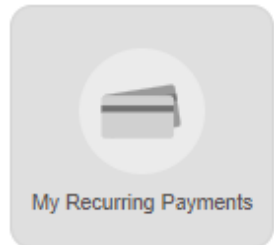
6. *To view your entire transactional history, go to the bottom of the page and click **View All Transactions**.*
7. You will then see your past 6 months' history. You may choose a date range at the top of the Filter page to search on. Click Update Filter to run the search. Please keep in mind that payments made by cash, check, or mailed to Hevreh may 5-10 business days to appear on your account.
8. Click on **My Account** at the top of the page to return to the tile menu page.

OTHER FINANCIAL INFORMATION



MY STATEMENTS – REVIEW STATEMENTS CREATED ON YOUR ACCOUNT

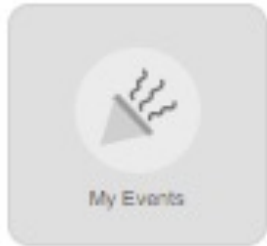
1. Click on the **My Account** tab
2. Click on **My Statements**.
3. If you have any statements, you should see them there.



HOW TO VIEW YOUR RECURRING PAYMENT PLAN

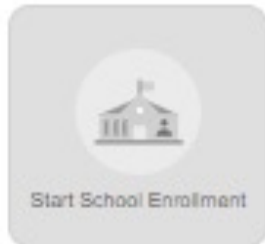
1. Click on the **My Account** tab
2. Click on **My Recurring Payments**.
3. You see on the next page a breakdown of any current recurring payment plans you have set up with Hevreh.

MY EVENTS & SCHOOL ENROLLMENT



MY EVENTS – REVIEW EVENTS YOU HAVE ENROLLED IN

1. Click on the **My Account** tab
2. Click on **My Events**.
3. If you have event registration, you should see them there.



SCHOOL ENROLLEMENT

This module is not active yet. More information will be provided when this feature is available.