This document should be used in conjunction with the U3A Beacon Management System User Guide which will provide additional detail on using the functionality described in this document. See section **5.2.5** for more information.

Purpose:
The purpose of this process is to add new members to a Group.

Process
There are two ways to add members to a group. The first way described is via the membership Menu . The second way is via the 'Groups' menu.

Membership Menu
1. Log on to the Beacon System and select 'Members' from the 'Membership' menu on the Administration Home page.

2. Locate the Member who is to be added to a Group. Finding the correct member is facilitated by using the 'Quick Find' feature outlined in red at the top of the screen. Enter all or part of the members name, street, town, postcode or membership number and click on 'Search'.

3. Alternatively, locate the member in the list by selecting the first letter of the member's surname in the list of letters from A –Z in blue. This will position the list in the appropriate place to find members with their surname starting with the letter selected.

4. Click on the check box in the 'Select' column (the leftmost column) against the relevant member.

5. Navigate to the end of the list of members by scrolling down the list, or if the list is long by using the round icon with an inset down pointing arrow in the top right of the screen which will take you to the bottom of the list.

6. At the bottom of the list there is a drop down box 'Select Action' which is preset to 'Send E-mail'. Click on small black down arrow and a list of actions is shown. Click on 'Add to Group'. A new drop down box is now shown:- 'Select Group'. Click on the black arrow and a list of groups is shown. Click on the relevant Group.

7. Now click on the 'Do with Selected' box. This will apply the action selected, in this case 'Add to Group' to the member selected. This will complete the action.

Groups Menu
8. Select 'Groups' from the Groups menu on the Administration Home page.

9. This will show a list of groups. Select the group to which the member will be added. This will show the Group Details and 4 menu items: 'Details' in black and in blue 'Schedule', 'Members', and 'Ledger'. Select Members.

10. The screen will now show a list of members of the Group. At the bottom of the list there are two options: 'Add member by name' and 'Add member by membership number'.

11. **Add member by name.** Click on the black down-arrow next to the '-select member-' box. This will provide a list of members from which the appropriate name can be selected. Click on the name required. This will provide the member's name and address to be shown for confirmation. Click 'Add'. There will now be shown a list of members for the relevant Group with the additional member shown.

12. **Add member by membership number**. Enter the membership number of the member who will join the Group. Click on 'Add'. There will now be a confirmation screen that shows the name of the member and their membership number with the checkbox in the 'Select' column already set. Click on 'Add selected members'. This will now show a list of members of the selected group with the additional member.

End