

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.

Purpose:

The purpose of this process is to register a new member onto the Beacon system.

Pre-requisites.

Before starting this process ensure that the following are available. It is not recommended to start this process if any of the following are not available.

- A completed paper U3A New Member application form.
- A supply of blank U3A membership cards
- A computer connected to the Beacon system
- The new member is available to you.

Enter all the data provided on the paper application form by the new member.

Data Entry

1. Log on to the Beacon System and select ‘Add new member’ from the Administration Home page.

The ‘Add New Member’ screen has four sections.

Type of Membership
Members Details
Address
Payment

Use the information on the application form to complete the Beacon new member screen

2. Type of Membership

There will only be one type of membership – ‘Individual’
Click on button ‘Individual’

3. Member’s Details

Enter:

Title
Forename
Surname
Male/Female/Unknown
E-mail Address
Mobile number

Known as
Emergency contact details

There is now a box on the form called *Polls: Office Use Only*

This provides a facility for the new member to indicate if he/she does not wish to receive email and/or does not wish to be contacted by telephone. Ask the new member to indicate which options, if any, are appropriate.

Tick the Gift Aid box if Gift Aid eligibility has been indicated on the form.

‘Share address with’:

Click on radio button ‘no-one’ when a member does not share an address, which is the default setting.

Click on radio button ‘new partner’ if a member shares an address with another member.

Then click on the small black arrow in the ‘-select-‘ box and select the relevant member from the list provided.

4. Address details:

The details shown in **Bold** are mandatory.

Enter:

Number / Name
Street
Additional lines
Town
County
Postcode
Telephone number.

If a mandatory field has not been completed, when the ‘Add Member’ is clicked an error message will be displayed in black with a blue ‘OK’:

‘Insufficient Information*’
‘Please Complete the highlighted fields’
‘OK’

Click on ‘OK’

The Add Member record will now be shown with the relevant field(s) shown with a red border.

Enter the appropriate value(s) in the field or fields and click on ‘Add Member’ at the end of the screen.

5. Payment

The payment screen will display the amount to pay.

Enter the Amount Received.

If a cheque is presented by the new member, there is no need to record the cheque number.

Click on 'Add Member'.

The Member Record for the new member will now be shown.

Membership Number

NOTE !

The **Membership Number** will be shown on the first line of the screen next to the member's name.

Write this number on the membership card and in the box in the top right of the paper form: *Office Use :Membership No.*

6. Member Record - Personal Details.

This screen will now allow the entry of the final two items of data shown on the paper form:

Suffix (e.g. MBE)
Initials

Enter suffix and initials as appropriate.

Note that the 'Gift Aid from' date will be set to today's date.

Click the 'Save' button at the bottom of the screen.

End