

How To: Create a New Member

Pre-entry checks

Before creating a new member record, you should verify that the address given on the form is accurate. Use <http://www.royalmail.com/find-a-postcode> to do this. Entering a postcode and (optionally) house number results in a list of relevant addresses. E.g. entering 'RG23 7DZ 84' produces a list containing 84 Pardown and 84A Pardown (Please be aware that the TOWN field maybe different to that expected. E.g. Sherfield on Loddon should have Hook in the Town field while Bramley has Tadley). You should also check that the enclosed cheque is for the correct value.

You should also check that this person has never been a member. On the Home page, Click Members. At the top of the screen select all the Status check boxes. If this member is now in the list then he/she should be 'renewed' instead of added as new – see separate 'How To'.

Adding a new member

- On the Home Page, click Add new member.
- Select the Class of membership (Individual, or Joint)
- On the resultant page complete all relevant fields.
- Note also that a (landline) Telephone is part of the address record (and situated at the end of the address information), while a Mobile number is part of the member record.
- Pay particular attention to the payment details fields.
- Add address information (see below)
- Tick the **Ability to print**, **Disability** and **TAM** boxes as appropriate
- Enter any disability information into the **Notes** box
- Press <Add member>

The member record will be displayed for confirmation.

Address fields

The address fields do not form part of the Member Record but are held on an associated Address Record. You only need to enter any address once.

Note that any house name should be in the same field as the number (eg "Twin Oaks 84A) and the only boxes which can be left empty are to the left of the 'Town' box.

Joint members

Suppose you receive applications from both Mr. A.N.Other and Mrs. X.Y.Other living at the same address:

- Create the Member Record and associated Address Record for one of them (say Mr.A.N...) as a **Joint** member and **Save** this.
- Create the Member Record for the second (Mrs.X.Y...), also as a **Joint** member selecting Mr.A.N... from the Share address with drop down list and **Save** this.
- Return to the first record you added and complete the Share address box

The two Member records will then share the Address Record.