



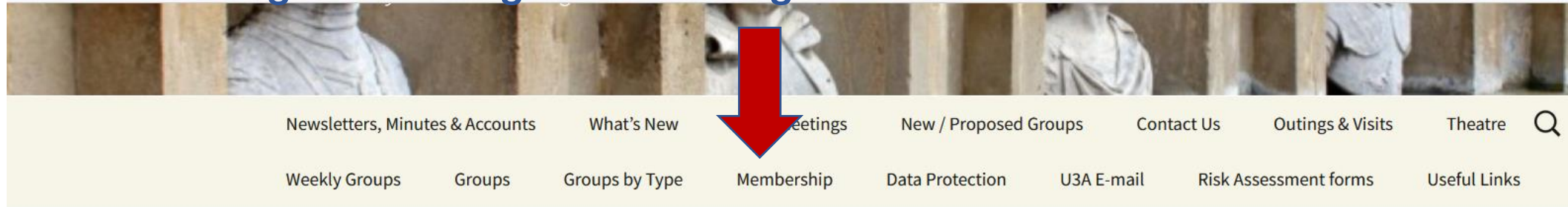
## Buckingham U3A Simple Membership System

### Guide for Group Leaders

#### Contents:

- Introduction and Logging in
- 1. – Group page overview
- 2. – Group page overview- icons
- 3. – Edit Group
- 4. – Manage Group Members
- 5. – Group Finance\*
- 6. – View Group Details
- 7. – Email Group Members
- 8. - Events - Overview

## Follow The Link To “Membership” From Buckingham U3A Site and then go to Existing Members Login:



## Existing Members Login

Existing members can login to see and amend their personal details.

You will receive an email from the membership secretary giving your user name, alternatively you may use your membership number.

You will be prompted to reset your password if you do not already have one. You will receive an email from the membership secretary with details of how to proceed.

[Login](#)

Total Page Visits: 410 - Today Page Visits: 1

### Recent Posts

[AGM 2022](#) November 2, 2022

[ipad tuition is restarting.](#) October 9, 2022

[Ann Dale](#) October 5, 2022

[National U3A Interest Groups Online](#)  
October 2, 2022

[Banking Hub – update](#) September 27, 2022

[Don Horne](#) September 27, 2022

[New Members coffee morning](#) September 26, 2022

[September Virtual Newsletter available](#)  
September 13, 2022

[Slade Indoor Bowls club open Day – Nothing to do with U3A](#) September 5, 2022

This is the Login Page – you will need your personal User Name and Password to access the site. It is usually your Surname and First Initial, or you can use your 4 digit Membership Number. If you cannot log in after following the guidance, you can ask the Membership Secretary:



## Login

Log in to Buckingham U3A Membership System with your user name and password. Log in can be with your user name or 4 digit membership number. User name is normally your surname and first initial (e.g. BloggsF).

If you do not know either your user name or number please contact the [Membership Secretary](#) by email. You will find a [Help Guide](#) here.

Don't forget to [Log Out](#) using the link once you have finished.

**Do we have your correct contact details?** Please review your profile regularly, to make sure it is up to date.

Recently we added a section for your contact information, in case of emergency. Please add these contact details as requested.

Show Password  
  
[Create/Reset Password](#)



### Groups & Activities: For Registered Members of Buckingham & District U3A

Log in to the Buckingham U3A Membership site with your user name and password – this is your personal user name linked to your membership.

Once logged in, click on the **Groups Menu** at the top to bring up the Groups & Activities list. Click on **your Group Name** to show details.


Group Details				
CODE	GROUP NAME	WEEK IN MONTH	DAY	TIME
	<a href="#">Architecture</a>	Second	Thursday	AM
	<a href="#">Art Appreciation</a>	First	Friday	AM
	<a href="#">Badminton</a>	Weekly	Friday	PM
	<a href="#">Board Games</a>	Weekly	Wednesday	AM
	<a href="#">Book Group 1</a>	Fourth	Thursday	PM
	<a href="#">Book Group 2</a>	Third	Thursday	PM
	<a href="#">Bridge Club</a>	Weekly	Tuesday	AM
	<a href="#">Bridge for Beginners</a>	Weekly	Monday	AM
	<a href="#">Bridge Improvers 1</a>	Weekly	Monday	PM
	<a href="#">Bridge Improvers 2</a>	Weekly	Monday	AM
	<a href="#">Bridge Wednesday</a>	Weekly	Wednesday	AM
	<a href="#">Calligraphy</a>	Second + Fourth	Thursday	PM
	<a href="#">Creative Writing</a>	First	Monday	AM
	<a href="#">Croquet</a>	Weekly	Friday	PM

## Group page - overview






The Group page gives the time, frequency, day and venue as well as a description of the activity.

It also shows the number of vacancies, whether the group is full or has a waiting list

The Group header contains a green left hand arrow which navigates you back to the alphabetical group page.



### History - Local History



<b>Time</b>	- Various
<b>Week in Month</b>	- Fourth
<b>Day</b>	- Thursday
<b>Venue</b>	- Masonic Hall
<b>Vacancies</b>	- 29

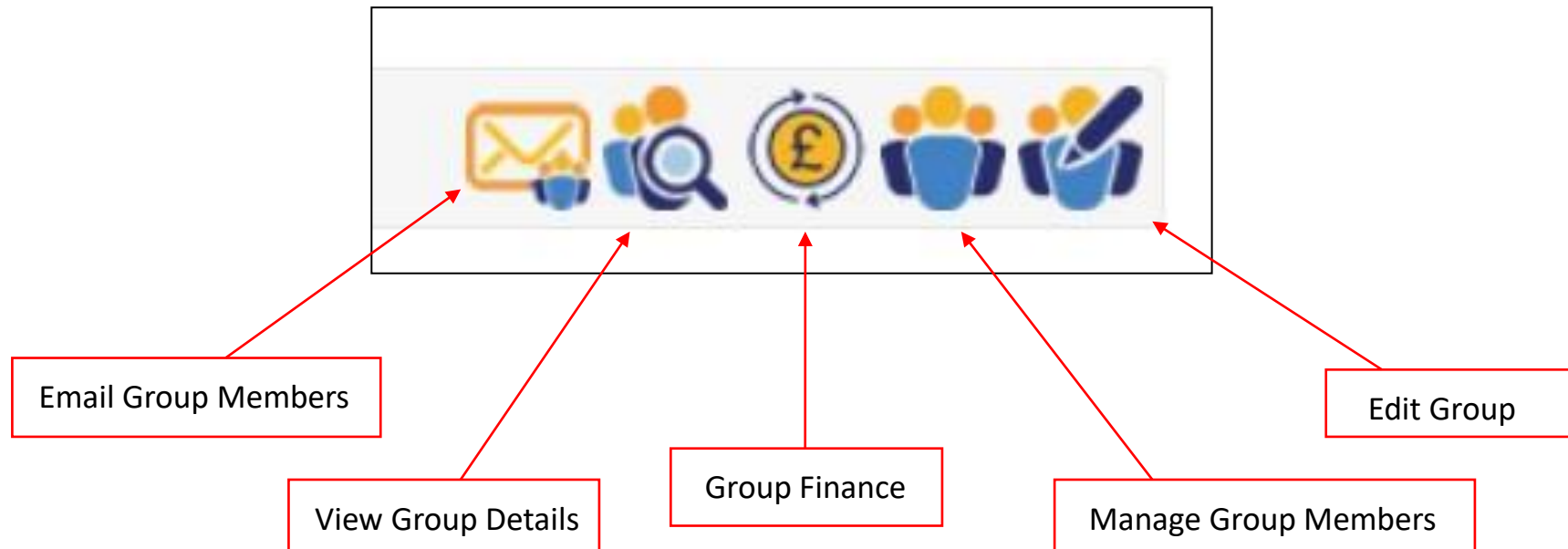
The aim of this group is to research the history of Sandbach and its surrounding area from Roman times to the present day.

At our regular meetings we will consider the sources of information best suited to support our research. We will also review the progress on the various projects that members are involved with and share some of the interesting discoveries that come to light.

It is expected that group members will have different desired levels of involvement, ranging from those who are curious but have little spare time to conduct research to those with bags of enthusiasm and local history. It is anticipated that members of the group will conduct their own research working either alone, in pairs, or in small groups, and once a year will arrange for the appropriate to that chosen interest.

The icons on the right-hand side enable you to edit group details and manage groups members etc. These are only visible once you have logged in.

## Group page – overview - ICONS

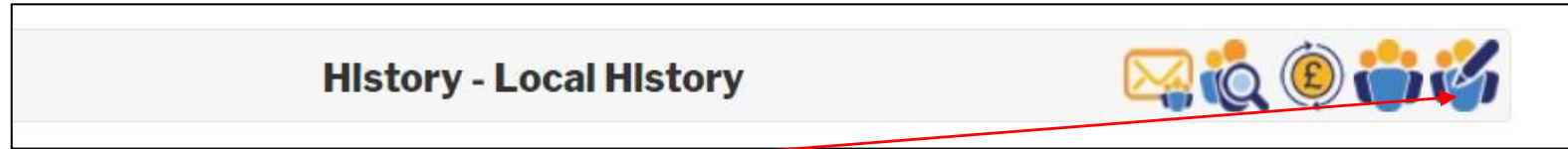


Before you start to add members to your group you will need to check that the information on your Group page is correct.

You will also need to add or update details of the size of your group and waiting list. This can be done via the icon “Edit Group”.

Edit Group

## Edit Group



To edit the information that appears on the Group page click on the Edit Group icon

This page is divided into 3 sections:

**General** - This section gives the group name, category and image boxes. This section **cannot** be edited by Group Leaders, any changes would need to be done by the Group Liaison Officer address:  
Group.liaison.officer@buckinghamu3a.org.uk

**Meetings** – This section can be edited if required. See below:

**Group Content** – This can be edited or changed if Incorrect.

The screenshot shows the 'Edit the Tai Chi Group' form with three main sections: 'General', 'Meetings', and 'Group Content'. The 'General' section includes fields for Name (Tai Chi), Category (Indoor Exercise), Code (TaiCh), Image, External Url, and Group Buddy. The 'Meetings' section includes Time (10:45), End Time (11:45), Week (Weekly), Day (Friday), Venue (Elworth Methodist Hall), Max Group Size (25), and Max. Waiting List (15). The 'Group Content' section features a rich text editor with a toolbar and a text area containing the description of Tai Chi for health. A red box highlights the 'Meetings' section.

### Edit the Tai Chi Group

#### General

Name:

Category:

Code:

Image:

External Url:

Group Buddy:

#### Meetings

Time:

End Time:

Week:

Day:

Venue:

Max Group Size:

Max. Waiting List:

#### Group Content

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, bulleted list, numbered list, link, unlink, and text color. The text area contains: "Tai Chi for health offers a gentle and relaxing form of exercise which offers benefits to general well-being as well as improving mobility, balance and strength. It is a non-combative, non-competitive form of Tai Chi. Slow fluid movements"




## Edit Group continued


**1. Time** - To change the time either click on the time box and enter the correct start time, or click on the clock icon and choose the correct time from the list.


Select the correct end time.


NB: Selecting the time 00:00 will insert the time as “Various” in the Group page.


**Meetings**

**Time:** 10:45 

**End Time:** 11:45 

**Week:** Weekly 

**Day:** Friday 

**Venue:** Elworth Methodist Hall 


**Max Group Size:** 25


**Max. Waiting List:** 15


00:00	00:15	00:30	00:45
01:00	01:15	01:30	01:45
02:00	02:15	02:30	02:45
03:00	03:15	03:30	03:45
04:00	04:15	04:30	04:45
05:00	05:15	05:30	05:45
06:00	06:15	06:30	06:45
07:00	07:15	07:30	07:45
08:00	08:15	08:30	08:45
09:00	09:15	09:30	09:45
10:00	10:15	10:30	10:45
11:00	11:15	11:30	11:45


**2. Week** – To change the meeting regularity click on the box and select the appropriate Description.

**Meetings**

**Time:** 00:00 


**Week:** Fourth 

**Day:** Thursday 

**Venue:** Masonic Hall 


**Max Size:** 30

**Waiting List Size:** 5

- Fourth 
- Fourth
  - Fifth
  - First + Second
  - First + Third
  - First + Fourth
  - First + Fifth
  - Second + Third
  - Second + Fourth
  - Second + Fifth
  - Third + Fourth
  - Third + Fifth
  - Fourth + Fifth
  - Weekly
  - Fortnightly
  - Every Other
  - Last
  - When Required
  - Occasional

**3. Day** – Click on the box and choose the day of the Week.

**Meetings**

**Time:** 00:00 

**Week:** Fourth ▼

**Day:** Thursday ▼

**Venue:** Masonic Hall ▼

**Max Size:** 30

**Waiting List Size:** 5

Thursday ▼

- Monday
- Tuesday
- Wednesday
- Thursday**
- Friday
- Saturday
- Sunday
- N/A
- Various

**4. Venue** - Click on the box and scroll down the list to choose the appropriate one. If your venue is not listed, please contact Group Liaison Officer.

Masonic Hall ▼

- Masonic Hall**
- Masonic Hall Bar
- Members' Homes
- Midsummer House
- Oasis Centre Green St
- Old Trafford
- Outside Town Hall
- Queen's Head Congleton
- Sandbach Community Football Centre
- Sandbach Cricket Club
- Sandbach High School
- Sandbach Library
- Sandbach Library - Marriott Room
- Scout Hut, Chapel St

## Edit Group continued

### **PLEASE NOTE: Group Size & Waiting List**

The maximum size of your group is up to you. There are several factors to take account of, for example:

- The type of activity and degree of tuition required
- Size of the venue & availability of equipment or facilities
- Health and Safety
- A regular absentee level, which allows more members to be signed than normally attend.
- Note: If your group uses Prepayment arrangements, where members pay for several sessions in advance, you will probably experience more consistent attendances.

Please try and estimate the waiting list size so that other members have a chance of becoming a member of your group within a reasonable period.

The Group Liaison Officer [group.liaison.officer@buckinghamu3a.org.uk](mailto:group.liaison.officer@buckinghamu3a.org.uk) will be pleased to help if you are unsure of the size settings to apply. You can change the settings at any time in “Edit Group”, except that you cannot reduce the sizes below the number already in the group or waiting list respectively.


If your group has vacancies, the group page will display the number of vacancies to anyone looking at the group. If the group is full, the display will show “Waiting List” if there are waiting list places available or otherwise “Completely Full”.

## Edit Group continued

**5. Max size** – Click on the box and type in the maximum number of people in your group.

**6. Waiting list size** – Click on the box and type in maximum number of people on your waiting list.

### Meetings

**Time:** 00:00 

**Week:** Fourth ▼

**Day:** Thursday ▼

**Venue:** Masonic Hall ▼

**Max Size:** 30

**Waiting List Size:** 5

## Edit Group continued

**7. Group Content** – Contains a description of your groups activities and can be edited at any time .

Editing toolbar

Click in the text box and type any alterations as required. The editing toolbar is available for various functions such as formatting your text.

Once you have completed any changes to this page click on the green tick either at the top or bottom of the page.

If you wish to cancel editing the page at any time, click on the cross but please be aware this will lose any changes you have made.

If you have edited the page and clicked the green tick you will receive this message.

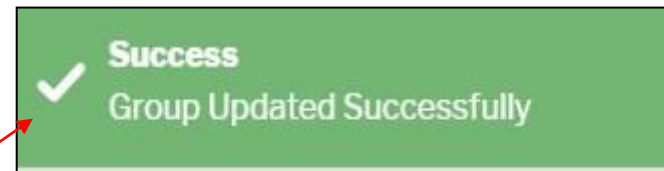
Group Content

The aim of this group is to research the history of Sandbach and its surrounding area from Roman times to the present day.

At our regular meetings we will consider the sources of information best suited to support our research. We will also review the progress on the various projects that members are involved with and share some of the interesting discoveries that come to light.

It is expected that group members will have different desired levels of involvement, ranging from those who are curious but have little spare time to conduct research to those with bags of enthusiasm and time to delve into original research of local history. It is anticipated that members of the group will conduct their own research into their chosen area of interest, working either alone, in pairs, or in small groups, and once a year will arrange for the rest of the group to visit a site appropriate to that chosen interest.

Additional meetings will be arranged on an occasional basis, which may include an invited guest speaking on a subject of



# Manage Group Members

# Manage Group Members

**History - Local History**

Click on the manage group members icon.

The Manage Group Members page consists of 3 columns.

The group size and waiting list which you have set up in the Edit Group page are shown beneath the middle and right columns.

### Group Members and Leaders

<input type="text" value="Search Members..."/>	<input type="text" value="Search Members..."/>	<input type="text" value="Save Waiting List Order"/>
1785 - ██████████ 746 - ██████████ 2213 - ██████████ 2312 - ██████████ 1448 - ██████████ 2324 - ██████████ 2323 - ██████████	<input checked="" type="checkbox"/> 1676 - ██████████ <input checked="" type="checkbox"/> 1713 - ██████████ <input type="checkbox"/> 1168 - ██████████ <input type="checkbox"/> 1363 - ██████████ <input type="checkbox"/> 2355 - ██████████ <input type="checkbox"/> 593 - ██████████ <input type="checkbox"/> 1859 - ██████████	
<b>Available Members (712)</b>	<b>Members (11/12)</b>	<b>Waiting List (0/0)</b>

*Add the group members from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Group Leaders. If the group capacity has been reached members will be added to the waiting list in the right column. They can be added to the group as soon as the number of members in the middle column is less than the group capacity.*

Displays the complete list of all members in alphabetical order.

Displays the list of your group members, highlighted name(s) indicate group leaders/deputies.

Displays your group waiting list.

**1. Add member Pt 1 -**

To add members to your group click on Search Members.

Type in the surname of the person you want to select, click on their name so it is highlighted.

NB: You can search for members by surname, first name or U3A membership number

**Group Members and Leaders**

Search Members... X Search Members... X Save Waiting List Order

1785 - [Name] 746 - [Name] 2213 - [Name] 2312 - [Name] 1448 - [Name] 2324 - [Name] 2323 - [Name]

1676 - [Name] 1713 - [Name] 1168 - [Name] 1363 - [Name] 2355 - [Name] 593 - [Name] 1859 - [Name]

Available Members (712) Members (11/12) Waiting List (0/0)

**1** Add the group members from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Group Leaders. If the group capacity has been reached members will be added to the waiting list in the right column. They can be added to the group as soon as the number of members in the middle column is less than the group capacity.

**2. Add member Pt 2 -** Copy this name into your group by using the right arrow or double clicking on their name.

You can select multiple members at a time by holding down the Ctrl key and clicking on the names one at a time.

**3. Add member Pt 3 -** Continue to add all the names of the people on your register.

The total number of members of your group will be displayed at the bottom of this Column.

**Note:** if you cannot find your members name in the list the [Membership Secretary](#) can confirm their status. It may be pending , lapsed, or they have not yet joined.



### Group Members and Leaders

Available Members (712)	Members (11/12)	Waiting List (0/0)
1785 - ██████████	<input checked="" type="checkbox"/> 1676 - ██████████	
746 - ██████████	<input checked="" type="checkbox"/> 1713 - ██████████	
2213 - ██████████	<input type="checkbox"/> 1168 - ██████████	
2312 - ██████████	<input type="checkbox"/> 1363 - ██████████	
1448 - ██████████	<input type="checkbox"/> 2355 - ██████████	
2324 - ██████████	<input type="checkbox"/> 593 - ██████████	
2323 - ██████████	<input type="checkbox"/> 1859 - ██████████	

**i** Add the group members from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Group Leaders. If the group capacity has been reached members will be added to the waiting list in the right column. They can be added to the group as soon as the number of members in the middle column is less than the group capacity.

**4. Group Leader** The names of the Group Leader and deputy will have been pre-selected with a tick against them.

NB: Any changes to the Group Leadership will need to be by the Group Liaison Officer.

Group Leaders are displayed at the top of the group with other members displayed in alphabetical order by surname.

**5. Waiting List** - Once the maximum number for the group has been reached any names selected will be automatically added to the waiting list and a message to this effect will be displayed on the screen

NB: People on the waiting list can only be added to your group when there are vacancies.

### 6. Remove Name from Group

You can remove someone from your list, or alternatively increase the size of your group in the Edit Group section

To remove a name, click to highlight it then use the left arrow to remove the name from your group

From u3a.simplmembership.co.uk

The Group cannot contain more than 18 members. All selected members were added to the waiting list

OK

### Group Members and Leaders

The screenshot shows the 'Group Members and Leaders' interface with three columns:

- Available Members (712):** A list of names with search and clear buttons.
- Members (11/12):** A list of names with checkboxes and arrow buttons. Two members (1676 and 1713) are selected and highlighted in green.
- Waiting List (0/0):** A list of names with search and clear buttons.

A red arrow points from the text in block 6 to the left arrow button in the Members column.

**Available Members (712)**      **Members (11/12)**      **Waiting List (0/0)**

Add the group members from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Group Leaders. If the group capacity has been reached members will be added to the waiting list in the right column. They can be added to the group as soon as the number of members in the middle column is less than the group capacity.

**7. Add member from waiting list** - To move someone from the waiting list into your group, highlight their name and use the left arrow

**8. Manage waiting list** - The waiting list puts people in first come first served order.

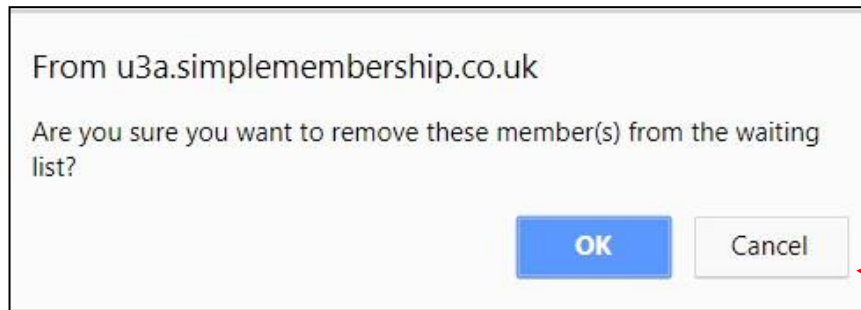
However, you, can move names up and down the waiting list by highlighting them and using the up and down arrows .

Remember to click on the 'Save Waiting List Order' button to keep the revised order.

**9. Remove name from waiting list** - you can remove someone from the waiting list by highlighting the name and clicking on the Cross.

The screenshot shows the 'Group Members and Leaders' interface. It features three columns: 'Available Members (712)', 'Members (11/12)', and 'Waiting List (0/0)'. The 'Available Members' column lists names like 1785, 746, 2213, 2312, 1448, 2324, and 2323. The 'Members' column lists names like 1676, 1713, 1168, 1363, 2355, 593, and 1859. The 'Waiting List' column is currently empty. A red arrow points from the 'Waiting List' column to the 'Members' column, indicating the process of adding a member. A blue information box at the bottom provides instructions: 'Add the group members from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Group Leaders. If the group capacity has been reached members will be added to the waiting list in the right column. They can be added to the group as soon as the number of members in the middle column is less than the group capacity.'

The screenshot shows the 'Group Members and Leaders' interface, identical to the one above. A red arrow points from the 'Waiting List' column to the 'Members' column, indicating the process of removing a name from the waiting list. A blue information box at the bottom provides instructions: 'Add the group members from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Group Leaders. If the group capacity has been reached members will be added to the waiting list in the right column. They can be added to the group as soon as the number of members in the middle column is less than the group capacity.'




If you delete a name from the waiting list you will receive a message to acknowledge that you have taken someone off the waiting list

Click OK or cancel

**NB:** For flexibility, the system will not actually prevent you adding more names to the waiting list than the number of places you have identified . The group page will display “Completely Full” if the number on the waiting list is at or above the identified size of the group.

# Group Finances

**Group Finance** This area is available for GCs to use for record keeping, including attendance numbers and amounts collected each session. Click on the £ sign at the top of the group page, then on Edit Group Finance to see the options. There is also an Icon for adding a Meeting report.  Further information can be provided on request.



You can download and print a Register from your group details, as required, and for external venues. The Register will show ICE information for those who have added those details to their profile. See next page.

### **PLEASE NOTE: REGISTERS & ATTENDANCE FEES**

- Please complete a separate finance report for each of your group meetings (if a fee is charged).
- Please keep a group Register for emergency evacuation role call purposes, and to identify which members have attended meetings, along with the amount of money collected and passed to the Treasurer.
- The nominal fee shown in the attendance fee box on the group page is the basic charge per session for your group.
- If your group uses visiting paid speakers the attendance fee for these sessions will be higher. Leaders are therefore requested to include the higher rate that members are charged, in the text at the top of their Group Content page.

View Group Details  
and Print Register  
in PDF or XLS format

# View Group Details

## History - Local History



Click on the icon to view group details

The View Group page gives details of group members, showing group leader(s) first, followed by group members in alphabetical order.

It includes their phone numbers and in case of emergency (ICE) name and contact details.

This information is captured from each members "My Profile" page so will be automatically updated if they make any changes

Group Leaders should encourage all the members of their group to check their own "My Profile" page for accuracy

Membership No	Name	Phone	Emergency Name	Emergency Number
120	Mike Reilly-Cooper			
226	P1 Ashton			
122	Gord Banks			
	Gord Bennett	01270998877	Mrs Clogger	0127099887
102	Ben Bloggs			
14	Fred Bloggs			
108	Bill Butterscotch			
97	Pearl Button	01270789456	Mother (of)	01270789456
73	Fred Flintstone	01234 987456	Wilma Flintstone	07456 325841
74	Willie Flintstone	01234 987456	Fred Flintstone	07951 348951

**1. Emergency Contact list**  
- To print out details of all group members click on the printer icon

**Renewal Overdue Warning:** This symbol is to inform you if a member's renewal is overdue. If they do not renew by the end of October, their membership will be lapsed, and they will automatically be removed from the group.



**Attendance Register** - To create an attendance register either click the pen and paper icon for the PDF version or the X icon for the Excel version. A PDF or Excel register will be downloaded onto your computer or tablet where you will be able to view and print it with a suitable application. (e.g: Adobe PDF Viewer or Microsoft Excel.)

Group Details - History - Local History

Group Member Details - History - Local History

Membership No	Name	Phone	Emergency Name	Emergency Number
120	Mike Reilly-Cooper			
226	P1 Ashton			
122	Gord Banks			
	Gord Bennett	01270998877	Mrs Clogger	0127099887
3391	Reg Blackburn	01274 461394		
102	Ben Bloggs			
14	Fred Bloggs			
108	Bill Butterscotch			
97	Pearl Button	01270789456	Mother (of)	01270789456
	Fred Crosby	01260555666	Joan	01270999888
74	Willie Flintstone	01234 987456	Fred Flintstone	07951 348951
67	Alice Johnson			
68	Doris Jones	01279 962908		
55	Fred Jones	01270111122		
117	Jo Jones			
1568	Bob Kelly	07888 873718		

Note re Emergency Contact Details: Users are asked for these on joining, and can also add them to their individual profile. Once on the profile they automatically update on the Register (as mentioned earlier). If they prefer, members can still use the ICE cards but be sure to keep them available; or use an emergency contact facility on their phone.



# Email Group Members

## Email Group Members

### History - Local History



Click on the icon to email group members

#### Email Group Members

[+ Compose New Email](#) [▶ Continue Saved Draft](#) [✕ Delete Saved Drafts](#)

#### Email History

Date	Subject
22 Jul 2021 20:10	Computing - Personal Laptop Group Message
22 Jul 2021 20:00	Computing - Personal Laptop Group Message
19 Jul 2021 12:36	Computing - Personal Laptop Group Message
18 Jul 2021 18:52	Computing - Personal Laptop Group Message
18 Jul 2021 18:47	Computing - Personal Laptop Group Message

**Compose New Email** – click on this button to take you to Email Group Members page.

**Saved Draft** – Your email text is auto-saved every 1min and will remain available after leaving the email page and/or logging-out. The “Continue Saved Draft” and “Delete Saved Draft” buttons become available if a draft has been saved.

**Email History** - Summary of last 5 emails sent to group members arranged in date order, most recent date first. Click on the blue “i” icon to view the content of the email

## 1 Select sender

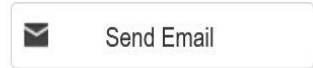
This will display your name as the sender. Please change this to the Group name with official email address for replies.

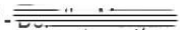
**2. Select recipients** If you want to email individual members use the Search Members box, double click or highlight their name.

Use the right arrow to add them to the recipients list in the right hand column.

**3. Select recipients** - If you want to email all your group, click on the double arrow in the centre column this will automatically move all the group members with email addresses into the right hand column without having to select them individually.

## Email Group Members










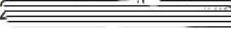




 Send Email

From: 1676 - 

Override Sender Name:



To: Group Members

 	<input type="button" value="▶"/>
 	<input type="button" value="▶"/>
 	<input type="button" value="▶"/>
 	<input type="button" value="▶"/>
 	<input type="button" value="▶"/>
 	<input type="button" value="▶"/>
 	<input type="button" value="▶"/>

Group Members (10)

Selected Members (0)



 Members without a valid email address cannot be added as recipients

**NB:** The system keeps a record of emails you have sent in your My Profile area, on the email tab. You can click on the "I" to view the content of the message.

#### 4. Members without email -

Members without a valid email address cannot be added as recipients and their names will remain in the left column with a cross on the email symbol.

















A summary of members with email and those who are postal will be displayed at the bottom of the columns

A reminder message will also be displayed


Please keep them informed by post/phone

**From:** 120 - Mike Reilly-Cooper

**To:** Search Members... Search Members...

 Gord Bennett	 25 - Fred Jones
 97 - Pearl Button	 120 - Mike Reilly-Cooper
 1234 - Ben Flowerpot	 25 - Simple Simon
 64 - Fred Oldbody	 101 - Sue Smith
 65 - Fred Oldperson	 82 - Alice Testing
 3199 - Hee Yen Smith	 83 - Baz Testing
 62 - Arch Thorp	 98 - Doug Whole
 1400 - Dave Tweddell	 37 - John Williams

**Group Members (0) (15 postal members)** **Selected Members (15)**

 Members without a valid email address cannot be added as recipients

**5. Group email subject heading –**  
Amend the text in the subject box as required

**6. Group email attachments -**  
Add files as required by selecting the attachments button and choosing a file you want to share.

**7. Group email content -** Once you have selected the recipients click in the content box and type your message.

Email Group Members

From: 120 - Mike Reilly-Cooper

To: Search Members... X

Search Members... X

Chris Attwood  
242 - Jan Bailey  
Fred Crosby  
999 - BC Crosby  
1236 - Susan Daniels  
80 - Bet Davies  
1234 - Ben Flowerpot  
274 - Bill Flowerpot

122 - GORD BANKS  
100 - Nutty Crunch  
203 - Elise Daly  
74 - Willie Flintstone  
89 - Geo George  
215 - Freya Gibbs  
120 - Mike Reilly-Cooper  
6 - Baz Hacking

Group Members (0) (19 postal members) Selected Members (11)

Members without a valid email address cannot be added as recipients

Subject: History - Local History Group Message

Attachment Select Select files to upload .jpeg,.jpg,.png,.doc,.docx,.xls,.xlsx,.pdf,.txt

Content: abc [Rich Text Editor Icons] "Helvetica... 15px Normal [Table Icon]

Type your message here

**8. Editing tools** – use the editing toolbar to change font, cut and paste content, spell check, add tables, documents, images or a hyperlink etc

**9. Group email send** - When you have completed typing your message click on the send button at the bottom of the page

Replies will come to your official email address. This will keep an Audit trail and ensure GDPR compliance.

Sent emails will also appear on your personal profile (My Profile) on the emails tab.

The screenshot shows an email composition window. At the top, there is a 'Subject' field containing 'History - Local History Group Message'. Below it is an 'Attachments' section with a 'Select' button and a list of supported file types: .jpeg, .jpg, .png, .doc, .docx, .xls, .xlsx, .pdf, .txt. The main content area is titled 'Content:' and features a rich text editor toolbar with icons for undo, redo, cut, paste, link, unlink, bold, italic, underline, bulleted list, numbered list, indent, font color, font size (set to 15px), text color, background color, and a table icon. The text area below the toolbar contains the placeholder text 'Type your message here'. At the bottom right of the composition area, there is a yellow 'Send' button. Red arrows point from the text boxes on the left to the editing toolbar, the text area, and the 'Send' button.



# Group Events – Setting Up and Managing

# Group Events – Setting up and Managing

The membership system has a facility for you to set up Group events, manage attendees, and respond to enquiries.

This can be found in the Group Management icons as shown: click on the green Add Event icon.

Next screen shows what happens then.

Note: Events will appear on the Group page by default when you select “Group Event”, but will also be visible on the relevant page under Events.



Add Event

## Next Step:

Select type of event from the drop-down list. In this case it's a **Group Event**.



Then choose the date, the time - you will see a time and calendar selection when you click on the icons.

Note: General category is not in use.

Then Choose the Venue from the drop-down list.

Next 2 screens show you what comes up.

### Add a new Event

Group:	Book Group 2	Date:	09 Dec 2022	
Name:	<input type="text" value="Lunch Meeting"/>	Time:	<input type="text"/>	
Category:	<input type="text" value="Open Meeting"/>	Duration:	<input type="text"/>	
	<ul style="list-style-type: none"><li>Open Meeting</li><li>Group Meeting</li><li>Social</li><li>Special Events</li><li>General</li></ul>	Venue:	<input type="text" value="(Other)"/>	
		Other Venue:	<input type="text"/>	
		Maximum Attendees:	<input type="text"/>	
		Waiting List Size:	<input type="text"/>	
		Meal Included?:	<input checked="" type="checkbox"/>	
		Guests Allowed?:	<input checked="" type="checkbox"/>	
		Sign Up Mode:	<input type="text" value="Apply to attend"/>	

# Next:

Here you choose the venue. Then add information about attendees – how many and waiting list. Click if there is a meal or not, and how they can apply. Note if you select manual you will get chance to email attendees to tell them about it.

The screenshot shows a form with the following fields and options:

- Date: 09 Dec 2022 (with a calendar icon)
- Time: (empty field with a clock icon)
- Duration: (empty text input)
- Venue: Ask leader (dropdown menu)
- Other Venue: (empty text input)
- Maximum Attendees: (empty text input)
- Waiting List Size: (empty text input)
- Meal Included?:  (with a red 'x' icon)
- Guests Allowed?:  (with a red 'x' icon)
- Sign Up Mode: Apply to attend (dropdown menu)

The Sign Up Mode dropdown menu is open, showing the following options:

- Manual
- Apply to attend (highlighted)
- Self signup

The screenshot shows the 'Add a new Event' form with the 'Meeting' section expanded. The form includes the following fields and options:

- Date: 09 Dec 2022 (with a calendar icon)
- Time: (empty field with a clock icon)
- Duration: (empty text input)
- Venue: (Other) (dropdown menu)
- Other Venue: Ask leader
- Maximum Attendees: Buckingham Community Centre
- Waiting List Size: Buckingham Youth Centre, London Road
- Meal Included?: Community Room (Lib)
- Guests Allowed?: Cote Barn (The Woolpack)
- Sign Up Mode: Cote, Woolpack

The Venue dropdown menu is open, showing the following options:

- Ask leader
- B'ham Athletic Football Club
- Buckingham Community Centre
- Buckingham Golf Club
- Buckingham Youth Centre, London Road
- Community Room (Lib)
- Cote Barn (The Woolpack)
- Cote, Woolpack
- Council Chamber Community Ctr
- Cricket Pitch Bourton Road
- Embleton Way Community Centre


Finally:

Add the description of the event and save it by clicking on the green cross:

Going back to the main page for the Event you can email attendees if required.

Finance can also be dealt with in Events but will be explained in another guide.

## Content



Describe Your Event Here

Then Click on Save - green Cross