How to add a member

David H. - 2023-03-24 - Membership

As an administrator, you are able to add new members into the organization when needed. This way the member does not have to do it themselves.

Adding a Member

1. Click the **Add Member** button from the Admin Dashboard from the Members, Non-Members and Staff Dashlet.

2. Fill in these details for the new member record:

    - **Member Details** - This section is for the member's name and email information.

        - **First Name** - The member's first name.

        - **Last Name** - The member's last name.

        - **Email Address** - The member's email address.

        - **Country Code** - The member's country code for their phone number.

        - **Preferred Phone** - The member's preferred phone number.

    - **Address** - This section is for the member's address information.

        - **Address Line 1** - First address line.

        - **Address Line 2** - Second address line.

        - **City** - The name of the city.

        - **Country** - The member's country.

        - **State/Province** - The member's state or province.

        - **Zip/Postal Code** - The member's zip or postal code.

    - **Email Preferences** - This section is to receive emails from the organization, or from the public using the Member Directory list.

        - **I consent to receive emails about news... Checkbox (Required) -** Check this checkbox so the member can receive emails from the organization.

        - **Email Channels** - Check each Email Channel checkbox , if the member wants receive

emails about those email channels.

- **I consent to receive emails from the member directory. Checkbox (Optional)** - Check this checkbox if the member wants to receive emails from the public directory.

- **Login Account** - The member's login details.
  - **Username** - The member's user name.
  - **Enter Password** - The member's password. The member is able to reset their password if needed.
  - **Confirm Password** - Enter the password again to confirm the member's password.
- **Membership** - The membership the member would like.
  - **Membership Types** - Select the membership type the member should be created with.
  - **Price Plans** - Select the price plan the member should be created with.
  - **By selecting this checkbox, you consent to allow our organization... Checkbox (Required) -** This checkbox grants consent for the organization to store the person's information into the system.

1. Once the new member's details are entered, click the **Next** button at the bottom of the form.
2. If there was a cost for the membership selected, a online payment form may load. Enter the payment details, then click **Pay** in the bottom right of the form.

If the payment was successful, a Success Confirmation page will display, and the member's application has been submitted to the organization. If the membership does not require approval, the member will be able to login to the organization's website right away.

Note

If there is no cost for the select membership, the new member will not have to pay, and the success confirmation page will display after Step 3.

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- How to import members