



User guide: Adding an adult member

Roles: Appointment Secretaries, Administrators, Commissioners, Group Scout Leaders

Process overview: This process will allow users with the correct access rights to add Adult Members to the system and to assign roles to them. The outcome of the process is that the user will be able to add new Adult Members and start the Appointment Process. The following initial information will be needed:

- Full Name, Address, Date of Birth and Join Date
- Contact Number
- Email Address

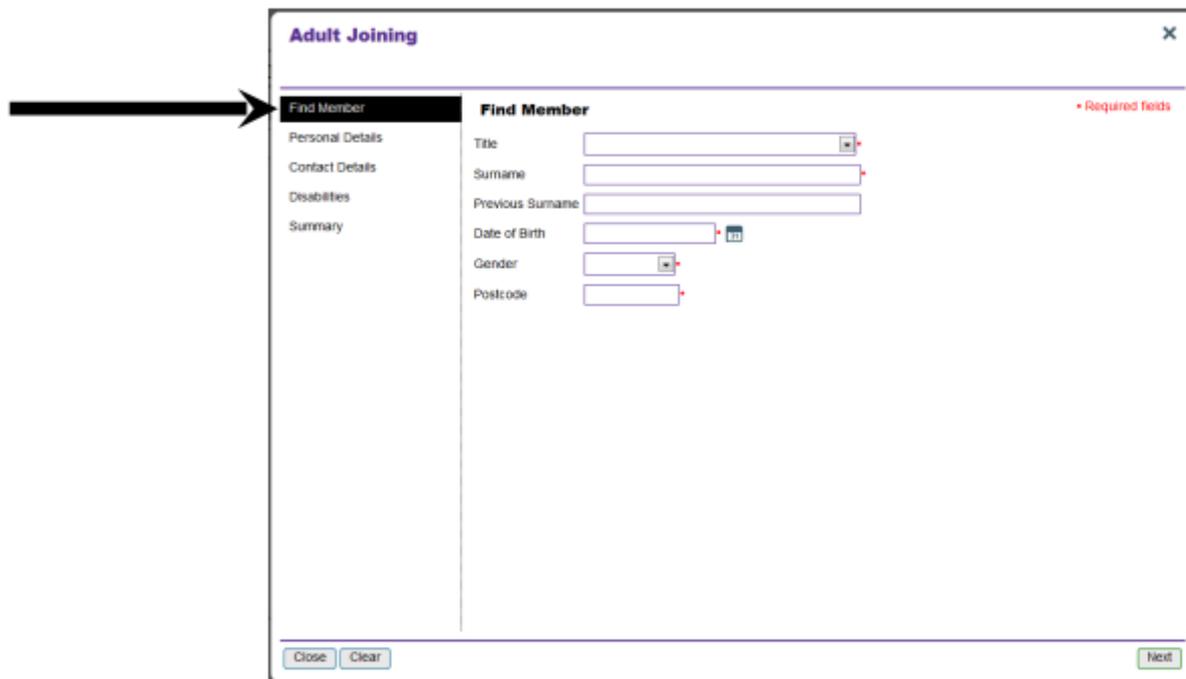
Process: adding an adult member

Ensure you have the correct role selected from the My Roles selector at the top of the page. (This will be the role that gives you the appropriate access rights to complete this process.)

- 1 Click the 'Joining' heading towards the top of the homepage.
- 2 A menu will appear under the 'Joining' heading. Click 'Add Adult'.



- 3 A popup box will appear titled 'Adult Joining'. There will be a list of options on the left hand side. Make sure 'Find Member' is highlighted. If not, click on it.



The image shows a popup window titled 'Adult Joining' with a close button (X) in the top right corner. On the left side, there is a vertical list of options: 'Find Member', 'Personal Details', 'Contact Details', 'Disabilities', and 'Summary'. The 'Find Member' option is highlighted with a black background and a white arrow points to it from the left. The main area of the popup is titled 'Find Member' and contains several input fields with red arrows indicating required fields: 'Title', 'Surname', 'Previous Surname', 'Date of Birth' (with a calendar icon), 'Gender', and 'Postcode'. A red dot next to the 'Required fields' text indicates that these fields are mandatory. At the bottom of the popup, there are 'Close' and 'Clear' buttons on the left, and a 'Next' button on the right.

- 4 In the 'Find Member' section enter the person's title, surname, date of birth, gender and postcode in the boxes provided and then click 'Next' at the bottom right of the window.

Adult Joining [X]

Find Member * Required fields

Personal Details
Contact Details
Disabilities
Summary

Title [red asterisk]
Surname [red asterisk]
Previous Surname
Date of Birth [red asterisk] [calendar icon]
Gender [red asterisk]
Postcode [red asterisk]

[Close] [Clear] [Next]

- 5 You will be presented with two options; click 'Add New Person'.

Adult Joining [X]

Possible Matches

Find Member **Possible Matches (No Records Found)**

Personal Details
Contact Details
Additional Needs / Disabilities
Summary

You may wish to:
Refine your search parameters and try again. [Search Again]
- or -
Alternatively, add a new person. [Add New Person]

[Previous] [Close] [Next (No matches above)]

- 6 This will take you to the 'Personal Details' page. Here, you will need to enter the new Member's information including their forename(s) and date of joining. You will also be able to enter other details such as the person's occupation. When complete click 'Next' at the bottom right.

The screenshot shows the 'Adult Joining' form with the 'Personal Details' section active. The form includes fields for Membership No, Title (Mr), Gender (Male), Forename(s), Surname (Dane), Known As, Ethnicity, Date of Birth (03 April 1985), Date of Joining, Honours (with an 'Add' button), Occupation, Occupation Detail, and Gift Aid? (checkbox). A red asterisk indicates required fields. A 'Next' button is at the bottom right, and 'Previous', 'Close', and 'Clear' buttons are at the bottom left. Two black arrows point to the 'Next' button and the 'Forename(s)' field.

- 7 On the following page you will need to enter the new Member's contact details. These include a home address, contact number and email address.

For UK addresses you must use the valid UK postcode format with spaces (eg E4 7QW.) If the Member you are adding lives in a country that does not use postcodes, use 'NOPCODE'. Clicking the magnifying glass icon next to the postcode box will provide you with a list of addresses linked to that postcode. Click 'Select' for the address you want to use, which will then fill in the address boxes automatically. Once complete, click 'Next' at the bottom right to move on.

The screenshot shows the 'Adult Joining' form with the 'Contact Details' section active. The form is divided into several sub-sections: 'Home Address' (Postcode: E4 7QW, Address, Town, County, Postcode, Country), 'Mailing Preferences' (TSA Mail, TSA Subsidiary Mail), 'Email Addresses' (3 rows with Primary? checkboxes), 'Telephone Numbers' (3 rows with Primary? checkboxes), and 'Social Media' (3 rows). A red asterisk indicates required fields. A 'Next' button is at the bottom right, and 'Previous', 'Close', and 'Clear' buttons are at the bottom left. A black arrow points to the 'Next' button.

- 8 The following page will let you add details of any additional needs or disabilities. The drop down menu can be used to add the relevant additional need or disability, and any extra information can be added by typing into the 'Details' box.
- 9 The 'Summary' page will display all the information provided within each section under the relevant section heading. If you want to change any of the information within a particular section, click the 'Edit' button next to the section name.

When you are ready to add the Adult Member, click the 'Save and Add New Role' button at the bottom right of the window.

Summary	
Personal Details Edit	
Name	Mr Jake Demo
Date of Birth / Gender / Ethnicity	03 April 1985 / Male
Honours	
Occupation	
Gift Aid	NO
Contact Details Edit	
Current Address	The Scout Association Cobwell Park LONDON E4 7QW UNITED KINGDOM
Telephone	12245678 (Daytime) - MAIN
Email	test@nest.com (Home) - MAIN
Mailings	TSA Mail: NO / TSA Subsidiary Mail: NO
Special Needs Edit	
Qualifications & Skills Edit	
Hobbies & Interests Edit	

- 10 A pop up window will appear asking you to confirm that permission was given for The Scout Association to hold the information provided. Click 'OK' to continue adding the Member.

Before you finish

By selecting OK you are confirming that permission has been given to hold this information.

[Read about your data protection responsibilities here.](#)

11 The 'Assign New Member Role' screen will automatically appear. Please refer to the [Adding a New Role to an Adult Member](#) user guide, from page 4 onwards.

Please note: If a Member role is not assigned at this point and you leave this screen, you will not be able to find the Member again, as they will not have a role in your hierarchy.