

Week two – Getting started with the member database

Task 1: Adding and checking members details

If Making Music has imported these for you then the group's members will already be on your Platform. You can email us at any point to import your members or if you would prefer to add them manually go to the **Admin Dashboard** and click on the **Member Database/Member List** which is under the members section. The database can also be found in the **Members Home** area as an icon. To add a new member, click on the **Add new member** button. Please see the final part of this taskline as to why we would not recommend adding logins for members at this point

Adding each member manually takes: **1 minute**

Top tip: Remember to look at all tabs when adding a new member and if applicable add memberships and participations as well

Task 3: Set up committees and teams

You can set up a Committee and any other teams you may have e.g. Autumn concert team. You can then assign members to these teams. To do this go to the **Admin Dashboard** and click on **Committees/Teams** then click the **Add new committee/team** button.

Top tip: You can also assign documents to each team and set them as private. They will then be viewable by the members in each team only. For instance, you may want to add minutes of meetings. Adding documents will be covered in week five.

Logins

If we have imported your members, then the members are listed but cannot access the members area as they do not have logins. If you are manually adding members we would recommend setting up member logins just before or just after your website has gone live and not at this point in the process. That way members will see the final version and will not have to keep getting used to changes. If you would prefer to set up logins at this point however then you can of course do so. See week eight of our guidance on how to do this.

Task 2: Add positions

Positions help to identify the people running the group. To add positions, go to the **Admin Dashboard** and select **Positions** under the members section. You can create a new position e.g. Treasurer and assign a listed member to that role. Creating emails for these roles is also covered in week seven.

Top tip: Having positions set up makes it easier when people step down from roles

Task 4: add your friends and sponsors

Making Music may be able to import these for you if you do have too many to manually add. In this instance email the information to us in an Excel spreadsheet and we will let you know. Otherwise you can also add these manually in the **Member Database/List** and select the membership type as sponsor/supporter.

Top tip: Look out for the sponsor tab when adding the sponsors details, this will allow you to add additional information such as company name which can be shown on a public page dedicated to your sponsors

Task 5: Add member groupings

These groupings help to separate out individuals in your database using different criteria. For example, you can add a grouping which filters by membership status so that you can see all former members in one place. Add member groupings by going to the **Admin Dashboard** and to **Member Groupings**. once added these will show as options to filter by in the **Member Database/List** and will also help with mailing list functionality

Top tip: Your Platform already comes with predefined member groupings such as regular members