

Adding Members to the Website – Complete Instructions

The process below outlines how to add new members to the CHEC website.

There are three major components to this process:

1. Background Work
2. WordPress User Account
3. Classifieds Daily Digest

Set-Up

In order to avoid confusion and frustration, I recommend that you have each of these files open in a new tab. This makes it easy to switch between windows to find the appropriate information. You can find these files in the shared "CHEC Admin" drive, and "CHEC Leaders 2019-2020" drive.

CHEC Admin Drive

1. "CHEC Applications 2019-2020" (or whatever the current year is)
2. "CHEC Master Application 2019-2020 (Responses)"

CHEC Leaders 2019-2020 Drive

3. "Dues 2019-2020"
4. "Emily NE 2019-2020 Applications" (If the member is a part of the NE group)

In addition to these files, you will also need to have CHEC's WordPress site pulled up in FireFox. Go to www.godsfishing.net/chec/.

1. Login in with these credentials:



In a different browser, like Internet Explorer, pull up the CHEC Website (www.godsfishing.net/chec/). I will explain later why this is important.

Background Work

Copying into Leader's Drive

1. Go to **CHEC Master Application 2019-2020 (Responses)** and locate the new response.
2. Remember the first and last name of the member and the region they selected.
3. Go to **CHEC Applications 2019-2020** and open the correct region folder.
4. Find the member's name. They are sorted alphabetically by last name.
5. Right click on the PDF.
6. Select **Make a copy**
7. Find the copy (it will say "Copy of ____") and right click on the PDF.
8. Select **Move to**
9. Click the top left-hand arrow to navigate out of the folder. Keep clicking the back button until you see two folders: **CHEC Admin** and **CHEC Leaders 2019-2020**.

10. Click on **CHEC Leaders 2019-2020** and open the correct region folder.
11. Press the blue button that says, **Move Here** (Note: Once you click on the button, it will give you a warning message that "CHEC Admin" will lose access. Click **OK**.)

Adding Member to Dues Spreadsheet

1. Go to **CHEC Master Application 2019-2020 (Responses)** and find member.
2. Double click on their name.
3. Scroll to the right (about ¼ of the way) until you get to the column asking how they paid. The letter of the column is BG.
4. Go to **Dues 2019-2020**.
5. Click on the appropriate region tab.
6. Write their name (or copy and past it from the master file) in the first column.
7. Mark how they paid with a bold X.
 - a. If member paid by Paypal, you will need to login into Paypal and confirm the payment is received.
 - b. If you do not have access to the PayPal account, please contact Kelley McGill or Dave Skelly.
8. Write the date that you added them to the spreadsheet.
9. If the member is from North East follow the steps below. If this doesn't apply, skip down to step 10.
 - a. Go to **CHEC Master Application 2019-2020 (Responses)** click on the row number (it will highlight the entire row) and copy it (Ctrl +C).
 - b. Go to **Emily NE 2019-2020 Applications**
 - c. Click on the next open row number and paste it (Ctrl + V)
10. Go to **CHEC Master Application 2019-2020 (Responses)** and color the timestamp orange. This signals that you have completed the background work for this member.

WordPress User Account

Adding Members

1. Go to the WordPress site and login with your credentials
2. Hover over the Christian Home Educators link on the top left-hand bar.
3. Click on dashboard.
4. Find the **Users** tab in the left-hand menu.
5. Click on the **Add New** button on the top right-hand corner.
6. Going back and forth between WordPress and the PDF of the member's file in the appropriate region folder, copy and paste their username, name, and email information into WordPress.
7. Click **Show Password**
8. Type their last name in lowercase
9. Check the box – **Confirm use of weak password**
10. Leave role as **subscriber**.
11. Under ultimate member role, select **CHEC Member**.

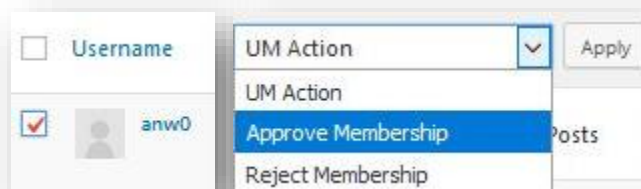
Password: Hide Cancel
 Very weak

Confirm Password: ☒ Confirm use of weak password

12. Scroll down to the bottom of the page and select the correct regional group.
13. Copy and paste the member's information from the PDF into the specific areas requested.
 - a. Email
 - b. Phone number
 - c. Address
14. Click **Add New User**

Approving Members

1. Click the check box on the left-hand side of the new account you just created.
2. Select the **Approve Membership** option on the UM Action drop down menu.
3. Click on the **Apply** button directly to the right.
4. Go to **CHEC Master Application 2019-2020 (Responses)** and color the next column (Returning member) green. This signals that you have approved the member for the website.



--- Once you approve a new member, email Kelley McGill so she can add them to the classifieds daily digest. ---

Classifieds Daily Digest

To have members receive a daily digest of when new classified ads are posted, you have to manually add them to the email list.

1. Go to **mailchimp.com**
2. Login with these credentials:
3. Click on **Audience** in the top menu bar.
4. Under the **Manage Audience** drop down menu on the right hand side, select **Add a Subscriber**.
5. Add the member's first name, last name, and email address in the appropriate boxes.
6. Scroll down to the bottom of the page.
7. Under tags, add the member to the **CHEC** tag. This ensures members will be on the classifieds daily digest list.
8. Check the box – **This person gave me permission to email them**.
9. Click **Subscribe**

