

Branch User Manual

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1. Important Note

Using the membership administration system on-line gives you access to personal information about past and present SRP members. This information is not to be disclosed to other members and it is to be used only for the purposes for which it is intended, in accordance with the Data Protection Act. You must not use this information for any other purpose.

In order to use the system you need to be given access by the membership secretary, memsec@srp.org.uk. When requesting access, please confirm that you have read and understood the note above,

Once you have been granted access, login to the website using the Login link at the top of the page. If you have not logged in before, you will need to set a new password: the login page guides you through the process.

Once logged in, go to the [membership administration page](#)

2. Editing Branch Membership

General

Click the edit tab : the screen will contain something like this:

	SUBS CATEGORIES					Previous	ALL PAYMENTS		SUBS PAYMENTS		DONATIONS		
	L	F	H	S	A		SRP	Branch Total	SRP	Branch Total	NYRO	WBF	Central
SRP	£0.00	£23.50	£35.00	£17.00	£0.00		£47.00	£47.00	£47.00	£47.00			
Branch													
Total													

(If you can edit more than one branch, you will need first to select the one you want from the second drop down box:

Controls

To the right of the branch there is a drop down box showing the current financial year. This allows you to look at information from earlier years, and towards the end of the year to edit information about the following year. The membership secretary can also use this drop down to make corrections to information for earlier years.

The Get spreadsheet button lets you download a spreadsheet of all the information shown in the table. This spreadsheet can also be used to create renewal forms for the following year – see the **Creating Membership Renewal Forms** section,

Header

At the top there are two tables. The first shows the current subscription rates for the different classes of membership. The second shows any payments that have been made (or should have been made) this year so far.

The subscriptions table shows the standard subscriptions for your branch, the subscriptions to Central SRP and the total payable by each class of member. The grey boxes are calculated automatically. The white boxes, containing the branch element of the subscriptions, are blank when you first start a new membership year. You can leave them blank if you wish. If you fill them in then they will be saved and used to set the initial branch subscription for each member (see below).

The second table shows the subscriptions and donations recorded so far. The amount you should have sent to SRP is shown in All Payments in the SRP column, The breakdown into subscriptions and donations can be used to fill in your branch accounts return at the end of the year.

Spreadsheet

Within the green frame, there is a table that looks much like a spreadsheet. If it overflows the frame, there are scroll bars within the frame so you can scroll it horizontally and vertically. You can also resize any column by hovering the mouse in the header row between columns until it changes to a double arrow and holding down the left button (or touching the screen) shows a double vertical bar,

No	Title	First	Surname	Cur	Stat	Sub Date	R	Sub SRP	Sub Branch	NYRO	WBF	Central	Concerto	Branch	Ac
x 12765		John	Adams	<input checked="" type="checkbox"/>	F	11/07/2015	<input type="checkbox"/>	£23.50	£21.50						1,
x 10131		Helga	Bogisch-Francis	<input checked="" type="checkbox"/>	F	21/11/2014	<input type="checkbox"/>	£23.50	£21.50						6
x 10132		Alex	Brooks	<input type="checkbox"/>	(F)		<input type="checkbox"/>								23

and then dragging it left or right.

The table shows current and past members of the branch. In the third row, Alex Brooks has not yet re-joined so her membership status last year is shown in parentheses. In the first row, John Adams has already re-joined this year so the **Cur** box is ticked, his membership status F, the subscription date and his SRP and branch subscriptions are shown. The **R** box is not ticked because he paid a full, not reduced, subscription. He has not made any donations, so the columns for NYRO, WBF, Central, Concerto and Branch donations are blank. The remaining columns list all the personal details and branch roles, if any.

Phone	Email	G	C	T	Qual	N	Branch role
0118 946 3928	rep matsrebbur@sky.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Secretary
07866 429066	alex.s.brooks@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

The text in the table is almost all grey: this indicates that it is unchanged from the values saved in the database (of course, since we haven't done anything yet).

To make changes to the database, you edit the table and then click **Save**. While you are editing the table, no changes are made in the database, so don't worry about making mistakes – you can undo them or simply give up and start again.

When working on the spreadsheet, each item is formatted to show what is going to happen:

grey, normal text	an unchanged item
black, normal text	an item being added to the database
black, bold	an item being changed in the database the old value is shown struck through underneath
black border	a checkbox whose value is being changed the old value is shown as 1 (ticked) or 0 (unticked) below
grey background	an item being ignored the old value is shown in grey strikethrough underneath
blue italic	an <i>item whose value is calculated by the system</i>
strikethrough	an item that is going to be deleted
orange, grey background	an item that is being ignored because it needs confirmation
orange border	a checkbox that is being ignored because it needs confirmation (and also the confirmation checkbox itself if it has not been ticked).
red	an item in error
pale yellow background	the row currently being worked on

To Renew a Subscription

All you have to do to renew a subscription is to click the **Cur** box.

	SUBS CATEGORIES					Previous	ALL PAYMENTS		
	L	F	H	S	A		SRP	Branch	Total
SRP	£0.00	£23.50	£35.00	£17.00	£0.00	£483.00	£439.00	£922.00	
Branch	£21.50	£21.50	£30.00	£6.00	£21.50				
Total	£21.50	£45.00	£65.00	£23.00	£21.50				

No	Title	First	Surname	Cur	Stat	Sub Date	R	Sub SRP	Sub Branch	NY
x 12765		John	Adams	<input checked="" type="checkbox"/>	F	11/07/2015	<input type="checkbox"/>	£23.50	£21.50	
x 10131		Helga	Bogisch-Francis	<input checked="" type="checkbox"/>	F	21/11/2014	<input type="checkbox"/>	£23.50	£21.50	
↻ 10132		Alex	Brooks	<input checked="" type="checkbox"/>	F	11/7/2017	<input type="checkbox"/>	£23.50	£21.50	

By default, the membership status is set to what it was last year. However, you can change it just by typing a different status into the **Stat** field. The possible values are:

- L: an Honorary Life member of the SRP (but see below for households with life members).
- F: individual membership

- H or h: household membership – all members should live at the same address. Please enter H for the person actually paying the subscription, and h for all other members. There should be exactly one H entry for each household.
- If the main person is a life member, enter LH rather than H. However, always enter h for all other members, even if they are themselves life members.
- S: student membership – for those who qualify for the student or youth rate
- A: Associate member – someone paying their central SRP subscription to another branch. If you know the main branch, add its 3 letter code after the A, eg AOXF for a full member of Oxford who is an associate of your branch

The date of the subscription is set to today's date, but again you can change that if it was received some time ago. The Central SRP subscription is entered automatically, and shown in blue to indicate that it is system-generated and can't be changed. In this example the branch element of the subscription is also entered automatically, based on the figure in the table at the top. However, you are free to change this figure if the member paid a non-standard subscription for some reason. If the standard branch subscriptions have not been entered, then the member's branch subscription is initially blank. You can enter a figure by hand if you wish, but it is entirely at the discretion of the branch and not obligatory.

If the member gave donations, enter them in the appropriate boxes.

Whenever you make a change to a line in the table, the **x** at the beginning of the line changes to the backward arrow ↶ that you see in the first line. Clicking that allows you to undo all the changes you have made to the line.

To Change a Person's Details

Simply type the new details in the relevant field, or click the relevant checkbox, New text will appear in bold and the old value is shown struck through below.

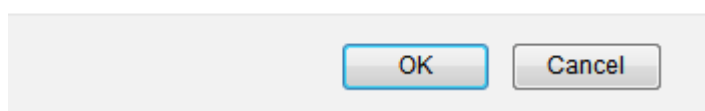
No	Title	First
↶ 10028	Mrs Miss	Clare
10031		David

When entering telephone numbers, you can give one or two numbers. If you enter two, separate them by a comma. Each number can contain spaces if you wish. UK numbers should start with zero; overseas numbers should start with "+" and the country code.

You can only change details such as name or address if the person has a current non-associate subscription to your branch. You can of course change the branch role of anyone, since that is a matter for your branch alone. If a person has more than one role, separate them by commas.

If you try to change or remove an existing subscription, you will be prompted to confirm the change:

You seem to be trying to change an existing subscriptions
If you really intend to do this, click OK.
If this was a mistake, click Cancel.



Gift Aid

The gift aid column must be completed with a two-letter code. The first letter is Y if gift aid should be claimed on this year's subscription, and N if not. The second letter describes the Gift Aid Declaration:

- Y The Society already holds a Gift Aid Declaration for the member
- P You are providing a new Gift Aid Declaration
- W You will provide a new Gift Aid Declaration
- N The member is not eligible for Gift Aid
- C There is an existing declaration, but it should be cancelled.

For existing members the entry is normally YY or NN. NY is valid, and means that the member doesn't wish to us to claim Gift Aid this year, but the declaration remains in force

For new members who are eligible for gift aid (or existing members who become eligible) enter YP. YW can be used if you haven't yet received the declaration: you will need to edit the entry when you do receive it.

Only use NC if the member will definitely not claim gift aid in future.

NP and NW are unlikely but allowed,

If you enter YP or NP, then a small button labelled **U** appears to the right of the entry, indicating that you need to upload a scan or picture of the gift aid declaration. Click this button, then browse to select the file containing the scan. Click **OK** when done.

To Add a New Member

Go to the bottom of the table, where you will see an empty line with a **+** on the left. Start typing the person's surname into the **Surname** box. After you have typed a few letters you will see a list of people in the database whose names start with what you have typed.



Each person's branch is shown, in parentheses if they don't have a current subscription. If the new member is one of them, click that name. If not, click the (new) entry at the top of the list. In either case, a new line is added to the table with the surname you have chosen. If you clicked an existing person, all their details are filled in. If not, just the surname is filled in. In either case the person is made a current full member, although again you can of course set their membership status to something different. If it is a completely new person, then fill in the rest of their details.

1. Title, first names and surname are obvious.
2. The SRP subscription is filled in automatically. If this is a completely new member joining after 1st January, you can tick the R box to claim a reduced subscription.
3. Branch subscription and donations are the same as when renewing.
4. For UK and ROI addresses, use the four Address columns for the street name, town and so on, and put the postcode in the separate postcode column. For overseas addresses, put the whole address including any ZIP or postal code, and the country, in the four address columns and leave the postcode column blank
5. Phone should include the area code. For UK numbers, start with 0; for overseas numbers, + then country code then number. You can have one or two telephone numbers; if you have two, separate them with a comma.
6. The pN (publish name) column should be ticked if the member has consented to have their name in the printed membership list. The pA, pP and pE fields indicate consent to include their address, phone and email.
7. The check boxes C and T should be checked if the member is interested in consort playing or is a teacher respectively.
8. Qualifications should be any relevant musical qualifications, mainly for teachers.
9. Branch role is selected from a list of allowed roles such as Treasurer. If a member has more than one, separate them by commas.

If it is an existing person, then you can change their details if the existing ones aren't correct.

If you need to change the surname of a newly added person, then type the changes into the surname field, ignoring the list of names that will be offered, and then move on to the next field (or press the tab key). You will be prompted to check that this is really what you intend to do.

What do you want to do?

Do you really want to edit the surname of Richard Evans?

If so click **Edit Surname**

If you intended to change this to a different person, click **Change Person** then select the person from the list or click **(new)Evanson**

Otherwise, click **Cancel**

Edit Surname **Change Person** **Cancel**

Evanson	<input checked="" type="checkbox"/>	F	20/2/2015	<input type="checkbox"/>	£23.50
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Choose **Edit Surname** if this is really what you wanted.

After adding a person, there is a – button at the left of the new row.

-	12034	Mrs	Audrey	Evans	<input checked="" type="checkbox"/>	F	29/3/2015	<input type="checkbox"/>	£23.50
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Clicking this removes the person again.

To Remove a Member

If a person simply fails to renew, **do not do anything at all**. Their details should remain on the database in case they rejoin or join another branch.

However, if a person dies, then click the **x** on the left of the row. This will prompt to check that you really mean this, and if you go ahead show the person with a strikethrough.

<input checked="" type="checkbox"/>	10032	Dr	Gwilym	Beechey	<input type="checkbox"/>	(F)								184 Mayor's Walk
<input checked="" type="checkbox"/>	10033	Mrs	D. I.	Bennett	<input type="checkbox"/>	(F)								4 Heath Walk

As with all other changes, you can of course undo this.

To Save Changes

Once you have made all the changes, click **Save**. Normally, this will show you the new state of the membership and summarise the old and new subscriptions and donations at the top of the table.

	SUBS CATEGORIES						ALL PAYMENTS			SUBS PAYMENTS			
	L	F	H	S	A		SRP	Branch	Total	SRP	Branch	Total	
SRP	£0.00	£23.50	£35.00	£17.00	£0.00	Previous	£434.50	£397.50	£832.00	£434.50	£397.50	£832.00	
Branch	£21.50	£21.50	£30.00	£6.00	£21.50	New	£23.50	£21.50	£45.00	£23.50	£21.50	£45.00	
Total	£21.50	£45.00	£65.00	£23.00	£21.50	Current	£458.00	£419.00	£877.00	£458.00	£419.00	£877.00	

No	Title	First	Surname	Cur	Stat	Sub Date	R	Sub SRP	Sub Branch	NYRO	WBF	Central	Concerto
x 12765		John	Adams	<input checked="" type="checkbox"/>	F	11/07/2015	<input type="checkbox"/>	£23.50	£21.50				

However, it may report errors, for example if you have omitted a required field or typed an invalid membership status. In that case, click OK and find the errors, which will be highlighted in red

-		Margaret	Jones	<input checked="" type="checkbox"/>	F	6/10/2014	<input type="checkbox"/>	£27.50					missing
---	--	----------	-------	-------------------------------------	---	-----------	--------------------------	--------	--	--	--	--	---------

If you can't see all the error message, expand the column until the whole message is visible.

Here, for example, the user forgot to type an address for the new member. Correct the errors and click **Save** again.

Creating Membership Renewal Forms

Sometime before the start of each financial year, it will be possible to select the new financial year in the drop down box above the header. You will then be able to do two things.:

1. You can record the branch subscriptions that you intend to charge in the next financial year.

2. Using the **Get spreadsheet** button a mailmerge you can download a spreadsheet (as a csv file) which you can use to make membership renewal forms for each of this year's members.

Further information about creating membership renewal forms is given in the document [SRP_membership_application_manual](#) available from the [branch administration page](#) of the website.

3. Online Membership

How It Works

Any member can change their details online.

In addition you can choose one or more of the following for your branch::

1. Around the beginning of the membership year, you can send members an email reminder that includes how to renew and details of your subscriptions and payment methods. To do this, you just need to tailor the branch details and wording to go in the emails.
2. If you choose, members can go to <https://srp.org.uk/my-membership> and log on to renew their membership. They and you will get an email about their application. When you receive their subscription, you confirm the application, and all their details are automatically updated. If you choose to allow this, you then need to set up the details of how you want members to pay their subscriptions.
3. If you wish, you can provide a link to an application form for new members. Again, when you receive their subscription, you confirm the application and they are registered as members.

You can choose to allow some or all of these features depending on your particular preferences.

Getting Started

To send reminder emails, click **Reminders** on the Edit tab.. The first time you do this you will be asked to define your email. At this point you can also choose whether to allow online renewals and applications; if you do, then you need to provide details of how you want members to pay. Once you've done that, clicking **Reminders** shows you a preview of your reminder emails and lets you put in your own wording and choose what information to include. You can send yourself a test reminder, and when satisfied send the reminders and if you wish, save the settings for use in future.

Alternatively, go to the **Applications** tab. You can create and alter your settings there by clicking **Settings**.

Processing Renewals

The email that you get when a members renews online tells you how they are going to pay. When you receive the payment, go to the **Applications** tab. You will see all pending applications. Click the dropdown on the left, which allows you to view the application.

Action	Id	Date	Type	No	First	Surname	Email	Payment	Status
☰	A10038	28/07/2022	renew	24378	John	Doe	john@anthonyhall.org	£50.00	pending
<div style="border: 1px solid black; padding: 5px; width: fit-content;"> Confirm Refuse View </div>									

If all looks OK then click **Confirm**: this will automatically transfer all the details from the application into the database for you, and send an email to the member, copied to you. Please note that this is **all** you have to do. You do **not** need to (and shouldn't) use edit tab to enter the information yourself.

Managing Personal Details

Anyone (whether or not your branch uses online renewals) can use the My Membership page to edit their details. Since no payment is involved, you are not involved in this at all, but you will receive an email to inform you that there has been a change.

Accepting Online Applications

When you choose to allow online membership, the settings page generates a link to the application form for new members. If you want to accept online applications, copy this link and put it into your branch web page.

When the applicant submits the form, you will receive an email just as for renewals, and can confirm the application in exactly the same way. Please do check that the application is really from someone completely new to SRP: this must **not** be used for existing members,

Current Limitations

Existing members can't move to a different branch online..

Associates and life members can't renew branch subscriptions.

4. Gift Aid

If you include branch subscriptions in your branch returns, you can download a claim spreadsheet at the end of the financial year. Go to the **Reports** tab, making sure the correct year is shown in the drop down box and click **Get Spreadsheet**.

The spreadsheet is in a text format called csv that can be used with any spreadsheet program. It has an entry for each member who has signed up for gift aid. The entry shows the date and amount of the claim, which is the branch subscription plus any branch donation. For your reference the individual items are shown to the right of the claim itself. If you claim gift aid on less than the full amount of the branch subscription, you will of course have to adjust the amount accordingly.

To complete the gift aid schedule for branch subscriptions, follow these steps:

1. If you have not already done so, download the Gift Aid schedule from <http://www.hmrc.gov.uk/charitiesschedules/giftaid.htm> choosing the correct version for your software – Excell or Libre Office.
2. Open the gift aid schedule and the csv spreadsheet.
If you are using Open Office, then when you open the csv you should set character set to **Western Europe(Windows-1252/WinLatin1)** and the type of the date column to **Date (DMY)** rather than standard.
3. In the csv, click in cell A2, (the first cell below the header line) then shift+click in the the claim cell in column I of the last row to select all the relevant data in the sheet. Copy this to the clipboard, for example with control+C.
4. In the gift aid schedule, click in the first white cell of the Donations Schedule Table (Item 1 Title).
5. Paste formulas:
 - a. In Excel 2007 or later, in the Home tab, Clipboard group, click the arrow under **Paste** and choose **Formulas (fx)** in 2010 or later).
 - b. In earlier versions of Excel choose **Edit, Paste Special...** and click the **Formulas** radio button and click **OK**.
 - c. In Open Office, choose **Edit, Paste Special....** Uncheck **Paste all**, and check **Text, Numbers, Date & Time** and **Formulae**; uncheck **Comments, Formats** and **Objects**, Click **OK**.
6. To find the earliest donation date for Box 1, go back to the csv file and in cell M1 type the formula **=min(H2:H1000)**. This will display the earliest date. Copy this and paste its value into Box 1. (in Open Office you will have to format K2 as date first, or simply type the value into Box 1 by hand).

If you need advice about general gift aid matters, please contact the Gift Aid Administrator, giftAid@srp.org.uk.

If you need help with the spreadsheet, please contact the web editor, webedit@srp.org.uk.