

INPUTTING NEW MEMBERS INTO THE JUST BETWEEN FRIENDS SYSTEM

As with any membership management system you must add people into the system. The Just Between Friends system allows for three different ways of adding people. Some of the key points you will want to note before beginning the addition of people into the system is:

1. People are added into **households**. Therefore all members of one nuclear family will be in the same household
2. Each member of the household can stand up and be counted as an individual PTA member as appropriate
3. Non-PTA members in the household should be entered, examples of why this would be a good idea is for:
 - a. Future PTA campaigns
 - b. Targeted communications by such things as grades and volunteers,
 - c. Student directories as required
4. There are three main ways to input new members.
 - a. Member Self- Entry
 - b. Individual, manual entry
 - c. Spreadsheet Upload
5. Important: If households are in the system already for your unit do not add them again. Update and manage PTA information as required. Once again do not add households and people who are already in the system.

Below will review and summarize the three ways to add households and people to the system.



Member Self – Entry Summary

- ♥ Inform – Tell your parents how you will be using Just Between Friends: for communications, directories, activities or producing membership cards as examples
- ♥ Notify – Send the parents their invitation code that will make them part of your unit. Use the email import method if you have email addresses from a list
- ♥ Approve them into the system

Individual Manual Entry

1. Run Community Roster Report from “View Your People”
2. Determine new people to be added to unit
3. Inform – Tell your parents how you will be using Just Between Friends: for communications, directories, activities or producing membership cards as examples
4. Enter individual households into the system, *taking care when entering Households without email addresses since this can duplicate your information*

Spreadsheet Entry

1. Run Community Roster Report from “View Your People”
2. Edit your membership data – **Especiallly group members of the same household together.**
3. Determine new people to be added to unit
4. Inform – Tell your parents how you will be using Just Between Friends: for communications, directories, activities or producing membership cards as examples
5. Enter individual households into the system, *taking care when entering Households without email addresses since this can duplicate your information*

Tips and Hints

- Be sure to check for existing people without email addresses when entering via spreadsheet. If you enter people without email addresses and they are already in the system you will duplicate the household.
- You may use more than one method of entry
- In each of these cases the members will be asked to activate their email address
- If you cannot see them on your PTA Roster Page use your filters in the lower right side of the window or search a letter or specific member in “Show Search” or use the Community Roster Report to see entire listing
- Each member of the Household can be counted individually as a paying PTA member

- If you have selected to enter households yourself enlist the assistance of others. They can work at the same time as you from different locations
- You may enter people into the system if they do not have an email address, but must be done with the spreadsheet entry format
- Just Between Friends does not sell email addresses. Your member's email addresses are more secure than email groups in personal email accounts
- Search engines cannot find member information in the system