

Vision Computer Programming Services, Inc. 801 2<sup>nd</sup> Street North, Suite A Safety Harbor, FL 34695 888-425-6964 <u>email@visioncps.com</u> <u>www.visioncps.com</u>

## Members - Required Fields for Adding New Members

Would you like to make additional fields required during the adding of members? If so, follow these steps to show and make additional fields required on the Add Member screens.

- 1. From the Main Menu click the Local/Station Settings button
- 2. Click the Local Settings 1 tab (NOTE: The defaults you set here are for all computers on a network)
- 3. Click the 'Customize Add New Member Form (Visible or Required) button on the bottom of the screen
- 4. On the Primary Member Information tab choose the fields that you would like to be Visible and/or Required. Note that some of the fields are required and cannot be turned off.

	HELP? This screen is designed to	v	isible	Required		
	allow the User to configure	Ethnicity	ų	되		
	the 'Add New Member'	DOB	ų	<b>N</b>		
	IVIII.	SS#	Г	Г		
		Age Group	되	Г		
		Member ID Card Needed				
.		'Calculate' Member Number Button	ম			
۲						
		Note that several items, shown belo on the Add Member form. You may Members form, but you must add the	w, are choos em wh	always Visib se not to show en adding the	ole, and some are always Required v some of these values on the e Member initially.	
		Gender	9	되		
		Requires P/G Pickup	V			
		Entry Date		ম		
		Expiration Date	~	<b>v</b>		
		Membership Type	~	5		
					Close	

🙃 Customize Fields on Member Form							
	Primary Member Information	Additional Member Information	Add a Contact				
HELP?			Visible	Required			
This screen is designed to	Member Address		Y	Y ^			
the 'Add New Member'	School		Y	Y 🗆			
form	School Grade		Y	Y	own I		
10111.	Member Primary Phone Nurr	nber	Y	Y	at Top		
Double-click once to set	Member Primary Phone # Ty	pe	Y				
the field Visible on the	Has Special Needs/Health Is	sues	Y				
'Add New Member'.	Health Issues		Y		445		
Double-click again to set	Has Medications		Y				
the field Required. Double-	Medications		Y		Show		
click a third time to reset	Current Single Parent		Y		All		
the field to Not Visible.	County				Reset		
	Lives with Mom				List		
	Lives with Dad						
NOTEL If a User does	Lives with Grandparents						
not have permission to	Lives with StepMother						
edit a field, then that	Lives with StepFather						
field will NOT be	Lives with Other						
'Required' when that	Live with Other Text						
User adds a new	Annual Income Level			-			
Member.	Note that you can determine the order of the fields in the Additional Member Information section of						
	the 'Add New Member' form by using the arrows on the right.						
	Number of extra fields requested	(Note "Address" = 4 13 You	may only select up	to			
	fields: Street Address, City, State	e, Zip): 34 fi	elds to Show.	C	lose		

- 5. Click the Additional Member Information tab
- 6. Double click on any field to make it visible on the Add Member screen
- 7. Double click twice on any field to make it visible and required on the Add Member screen
- 8. Click the Group at Top button on the right so all of your visible fields are at the top of the list
- 9. Use the up/down arrows to move the fields into the order you would like to see them
- 10. Please note that there is a limit of 34 fields that can be shown on the Add Member screen and the system will give you a count at the bottom as you turn the visible option on fields
- 11. Click the Add a Contact tab
- 12. Check the box to Get Information for One Contact
- 13. Double click on any field to make it visible on the Add Member screen
- 14. Double click twice on any field to make it visible and required on the Add Member screen
- 15. In the bottom section double click on any field to make it visible

- 16. Click the Close button on the Customize Fields on Member Form
- 17. Click the Close button on the Local/Station Settings form
- 18. From the Main Menu, click the Members button
- 19. Click the New Member button
- 20. Fill in the members name
- 21. Choose the member's household information
- 22. Fill in the basic demographic and enrollment information and click Continue
- 23. Fill in the new fields that are visible and required. NOTE: you will not be able to continue adding a member if a required field is blank
- 24. If you have chosen to show and require Address, City, State and Zip you can choose the Zip from the dropdown that matches the members City, State, Zip combination and the City and State will fill in automatically
- 25. If you have chosen to show and require Member Primary Phone Number, you can type in the 7 digits of the phone and push tab or enter and the system will provide your Default Area Code and punctuation. If the Default Area Code comes up with 727, then you can fill in your Default Area Code in Local/Station Settings on the Station Settings tab in order to avoid having to type the area code for all your new members
- 26. Click Add Member And Continue to Contact button

Unit: 12 - Southside Clubhouse				
First: N	anci	Middle:	Last Daniels	
Step 5: Provide additional, club	configured, information ab	out this new member.		
Address	2456 Haven Road	×		
City	Anytown	<b>v</b> X		
State	FL	* *		
Zip	12345	*		
School	Home School	<b>• *</b>		
School Grade	7	• *		
Member Primary Phone Number	(123) 123-1234	*		
Member Primary Phone # Type				
Has Special Needs/Health Issues		•		
Health Issues				
Has Medications		•		
Medications				
Current Single Parent		•		
Back	Add Momt	or And Continue to Conta	et	Cancol
Dace	Add went	Ser And Continue to Contai		odiicei

dd New Member				
	Unit: 12 - Southside Clubho	use		?
Step 5B: Provide ad	First: Nanci ditional, club configured, information a	Middle: About this new member's	Last Daniels s first Contact.	
C Select (and optic	nally Edit) Contact Already in Database:		<b>T</b>	
Add New:	Contact First: Nicole	Middle:	Last: Dommer	
Select the correct Household for the new Contact	Same Household as Member Just Same Household as New Household	Added 🔹	Current Occupants of Daniels Household: Name Type Daniels, Nanci M	_
Address 2456 Harvey ; City [Anytown Contact Primary Phor Contact Preferred Er Employer:		Z345 v Edt Address Type Home v Type E-Mail v e	Relationship Aunt to Member Primary Contact □ Parent/Guardian □ Farent/Guardian □ Authr To Pickup Member □ NOT Auth To Pickup M	• lember
			Add Contact	Cancel

- 27. Here you can add a Contact Already in Database or Add New Contact
- 28. Choose the household for the new Contact
- 29. Fill in any fields that have been setup to view or be required
- 30. Click Add Contact
- 31. You will then be on the main members screen and can continue adding additional information or you can add the next member