**Creating a member**

1. Click on “Members” on the left hand navigation of the WordPress admin area.
2. You will now be presented with a list of members. You can search, sort and filter these members via the controls above the list.
3. Clicking the title of a member will take you to the edit screen for that member.
4. Once you are on the edit screen for a member you will see further details that you can amend. To save changes use the blue update button towards the top right of the interface.
5. To create a new member use the “Add New Member” button towards the top left of the interface.
6. Once you have clicked the new member button you will be taken to a blank edit screen for the new member.
   1. Title – This should be the member name in full.
   2. Content area – This will be the content shown on their member page on the front end of the website.
   3. Current office number – This field should automatically populate and controls the next letter to be used in the sequence for creating new office numbers.
   4. Member number – This will be automatically applied once the member has been saved, this does not need to be manually entered.
   5. Date applied – The date that the member applied to SCN
   6. Date enrolled (only visible when the member is active) – This is the date that the member was accepted as an active member.
   7. Admin notes – These are notes that can only be seen by admin and can be used to track various information.

**Creating an office**

1. Click on “Offices” on the left hand navigation of the WordPress admin area.
2. You will now be presented with a list of offices. You can search, sort and filter these offices via the controls above the list.
3. Clicking the title of an office will take you to the edit screen for that office.
4. Once you are on the edit screen for an office you will see further details that you can amend. To save changes use the blue update button towards the top right of the interface.
5. To create a new office use the “Add New Office” button towards the top left of the interface.
6. Once you have clicked the new office button you will be taken to a blank edit screen for the new office.
   1. Title – This should be the office name in full usually including the location.
   2. Location – You MUST assign a location on the map for the office otherwise it will not be displayed on the front end of the website. Clicking the map will drop a pin, you can also search for an address using the search box above the map. Please note if Google is unable to find an address you may need to simplify the address and manually assign the pin by clicking the map.
   3. Office description – This will be the content shown on their office page on the front end of the website.
   4. Specialisations – To add specialisations for this office click the blue “Add Specialisation” button. You will then be given a new row where you can select the relevant specialisation and add a description. This will appear on the office page. Please note to have contacts show up for a specialisation you MUST setup the specialisation on the office before you set it up on the contact itself.
   5. Member – Select the member that this office belongs to.
   6. Office ID – This will be automatically generated once the office is saved, it does not need to be manually entered.

**Creating a contact**

1. Click on “Contacts” on the left hand navigation of the WordPress admin area.
2. You will now be presented with a list of contacts. You can search, sort and filter these contacts via the controls above the list.
3. Clicking the title of a contact will take you to the edit screen for that contact.
4. Once you are on the edit screen for a contact you will see further details that you can amend. To save changes use the blue update button towards the top right of the interface.
5. To create a new contact use the “Add New Contact” button towards the top left of the interface.
6. Once you have clicked the new contact button you will be taken to a blank edit screen for the new contact.
   1. Title – This will be automatically generated and does not need to be entered.
   2. Associated offices – This is how you connect a contact to an office as well as a specialisation. Click the “Add Office” button to be given a new blank row. Select the appropriate office from the dropdown, enter a job title, email if it differs for this particular office association. Finally if the contact is associated with a specific specialisation you can select this from the dropdown. This will then display them under that specialisation on the office page (so long as the specialisation and description has already been setup on the office itself).
   3. Member – Select the member that this contact is associated with.
   4. User account – This shows which WordPress user is connected to this contact, this allows the contact to login. You can manually create a WordPress user and assign it here or further down flag user account required and when the contact is saved the user will be automatically created and assigned to the contact and an email sent to the contact with their login details.
   5. Publicly visible – This dictates whether the contact will show on the front end of the website. For SCN account contacts etc this can be set to no to only have the contact exist in the admin area.
   6. Admin contact – This allows you to flag a contact as being an admin contact for SCN
   7. Contact order – Adding a number here will affect the ordering of contacts within an office so you can create a custom order of how they will display.
   8. User account required – This flags the contact as requiring an account.

**Managing Conference Applications**

1. Click on “Conf. Attendance” on the left hand navigation of the WordPress admin area.
2. You will now be presented with a list of conference applications. You can search, sort and filter these applications via the controls above the list.
3. Clicking the member name/title for an application will take you to the edit screen for that application.
4. Once you are on the edit screen for a contact you will see further details that you can amend. To save changes use the blue update button towards the top right of the interface.
5. To download an up to date report on conference attendance click the “Download Report” link underneath the Conf. attendance menu item on the left of the interface. This will generate a new report of all current data held and download it in Excel format.