

SWISH - How to Guide for Group Leaders

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*Please Note: For Group Finances where members may wish to pay online there is a separate guide available, “Group Finance Online Reporting Guide” which is to be read in conjunction with this guide

Introduction



Go to the Sandbach U3A homepage
<http://sandbachu3a.org.uk> and
click on the Groups tab

Under the Activity Groups
heading click **Login**, to log
in with your username and
password

Activity Groups

- [How to Join Groups](#)
- [Venue Details](#)
- [Login](#)

Once you have logged in you will be returned
to the Activity Groups page, this is arranged in
alphabetical order. From the list scroll down
and click on your group

Activity Groups

- [How to Join Groups](#)
- [Venue Details](#)

[CLICK TO DOWNLOAD A PRINTABLE LIST OF ALL GROUPS - This includes group start and end times \(.pdf file\)](#)

[Add New Group](#)

Group Details

[Summary By Category](#)

[Summary By Day](#)

[Groups With Vacancies](#)


Group Name	Week In Month	Day	Time
A Good Read (Monthly)	Second	Friday	AM
A Good Read 2 (Monthly)	Second	Monday	PM
Antiques & Collectables (Monthly)	Third	Friday	AM
Art Appreciation	Second	Friday	PM
Astronomy (Monthly)	Fourth	Monday	PM
Bird Watching 1 - INACTIVE	Various	Various	AM
Bird Watching 2 (Monthly)	Second	Wednesday	AM
Book Group - Fiction 1 (Monthly)	First	Thursday	PM
Book Group - Fiction 2 - TEMPORARILY SUSPENDED	Third	Tuesday	PM

Group page - overview






The Group page gives the time, frequency, day and venue as well as a description of the activity.

It also shows the number of vacancies, whether the group is full or has a waiting list

The Group header contains a green left hand arrow which navigates you back to the alphabetical group page.



Hlstory - Local Hlstory

Time	- Various
Week in Month	- Fourth
Day	- Thursday
Venue	- Masonic Hall
Vacancies	- 29

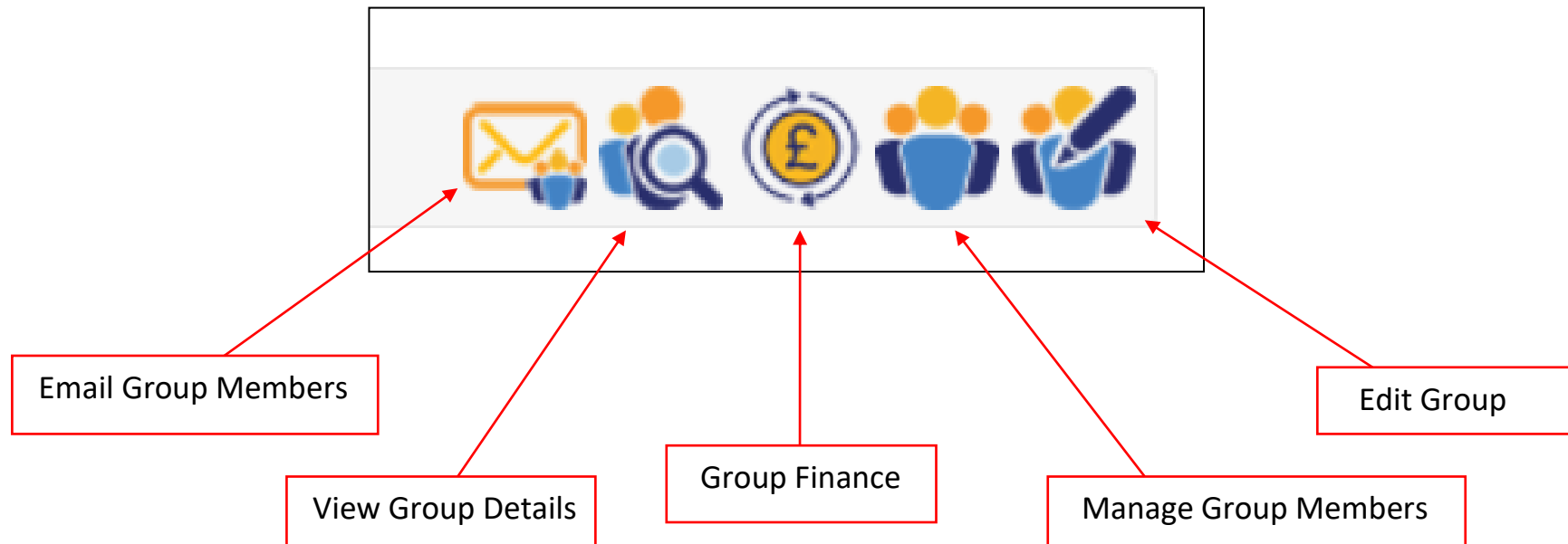
The aim of this group is to research the history of Sandbach and its surrounding area from Roman times to the present day.

At our regular meetings we will consider the sources of information best suited to support our research. We will also review the progress on the various projects that members are involved with and share some of the interesting discoveries that come to light.

It is expected that group members will have different desired levels of involvement, ranging from those who are curious but have little spare time to conduct research to those with bags of enthusiasm and local history. It is anticipated that members of the group will conduct their own research working either alone, in pairs, or in small groups, and once a year will arrange for the appropriate to that chosen interest.

The icons on the right-hand side enable you to edit group details and manage groups members etc. These are only visible once you have logged in.

Group page – overview - ICONS



Before you start to add members to your group you will need to check that the information on your Group page is correct.

You will also need to add details of the size of your group and waiting list.

This can be done via “Edit Group”.

NB: If none of the above icons are visible on your group page please contact the membership secretary who will set up the appropriate access membership@sandbachu3a.org.uk

Edit Group

To edit the information that appears on the Group page click on the Edit Group icon

This page is divided into 3 sections:

General - This section gives the group name, category and image boxes. This section **cannot** be edited by group leaders, any changes would need to be undertaken by the Groups Coordinator, e-mail address: groups.co-ordinator@sandbachu3a.org.uk

Meetings – This section can be edited if required see page 6

Group Content – This can be edited or changed if incorrect, see page 10

History - Local History

←
Edit the Tai Chi Group
✓ ✕

General

Name:

Category:

Code:

Image:

External Url:

Group Buddy:

Meetings

Time:

End Time:

Week:

Day:

Venue:

Max Group Size:

Max. Waiting List:

Group Content

B **I** **U**

Arial 16px Normal

Tai Chi for health offers a gentle and relaxing form of exercise which offers benefits to general well-being as well as improving mobility, balance and strength. It is a non-combative, non-competitive form of Tai Chi. Slow fluid movements


Edit Group con't


1. Time - To change the time either click on the time box and enter the correct start time, or click on the clock icon and choose the correct time from the list.

Select the correct end time

NB: Selecting the time 00:00 will insert the time as "Various" in the Group page

Meetings

Time: 10:45 

End Time: 11:45 

Week: Weekly ▼

Day: Friday ▼

Venue: Elworth Methodist Hall ▼

Max Group Size: 25


Max. Waiting List: 15

Time Picker

00:00	00:15	00:30	00:45
01:00	01:15	01:30	01:45
02:00	02:15	02:30	02:45
03:00	03:15	03:30	03:45
04:00	04:15	04:30	04:45
05:00	05:15	05:30	05:45
06:00	06:15	06:30	06:45
07:00	07:15	07:30	07:45
08:00	08:15	08:30	08:45
09:00	09:15	09:30	09:45
10:00	10:15	10:30	10:45
11:00	11:15	11:30	11:45

2. Week – To change the meeting regularity click on the box and select the appropriate description

Meetings

Time: 00:00 

Week: Fourth ▼

Day: Thursday ▼

Venue: Masonic Hall ▼

Max Size: 30

Waiting List Size: 5


- Fourth ▼
- Fourth
 - Fifth
 - First + Second
 - First + Third
 - First + Fourth
 - First + Fifth
 - Second + Third
 - Second + Fourth
 - Second + Fifth
 - Third + Fourth
 - Third + Fifth
 - Fourth + Fifth
 - Weekly
 - Fortnightly
 - Every Other
 - Last
 - When Required
 - Occasional

Edit Group con't

3. Day – Click on the box and choose the day of the week

4. Venue - Click on the box and scroll down the list to choose the appropriate one. If your venue is not listed please contact the Groups Coordinator e-mail address:
groups.co-ordinator@sandbachu3a.org.uk

Meetings

Time: 00:00 

Week: Fourth ▼

Day: Thursday ▼

Venue: Masonic Hall ▼

Max Size: 30

Waiting List Size: 5

Thursday ▼

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

N/A

Various

Masonic Hall ▼

Masonic Hall

Masonic Hall Bar

Members' Homes

Midsummer House

Oasis Centre Green St

Old Trafford

Outside Town Hall

Queen's Head Congleton

Sandbach Community Football Centre

Sandbach Cricket Club

Sandbach High School

Sandbach Library

Sandbach Library - Marriott Room

Scout Hut, Chapel St

Edit Group con't

PLEASE NOTE: Group Size & Waiting List

The maximum size of your group is up to you. There are several factors to take account of, for example:

- The type of activity and degree of tuition required
- Size of the venue & availability of equipment or facilities
- Health and Safety
- A regular absentee level which allows more members to be signed than normally attend. **Note: If your group uses PrePay arrangements, where members pay for several sessions in advance, you will probably experience more consistent attendances.**

Please try and estimate the waiting list size so members have a chance of becoming a member of your group within a reasonable period.

The Groups Coordinator groups.co-ordinator@sandbachu3a.org.uk will be pleased to help if you are unsure of the size settings to apply. You can change the settings at any time in “Edit Group”, except that you cannot reduce the sizes below the number already in the group or waiting list respectively.

If your group has vacancies, the group page will display the number of vacancies. If the group is full, the display will show “Waiting List” if there are waiting list places available or otherwise “Completely Full”.

Edit Group con't

5. Max size – Click on the box and type in the maximum number of people in your group.

6. Waiting list size – Click on the box and type in maximum number of people for your waiting list.

Meetings

Time:

00:00

⌚

Week:

Fourth

▼

Day:

Thursday

▼

Venue:

Masonic Hall

▼

Max Size:

30

Waiting List Size:

5

Edit Group con't

7. Group Content – Contains a description of your groups activities and can be edited at any time

Editing toolbar

Click in the text box and type any alterations as required. The editing toolbar is available for various functions such as formatting your text.

Once you have completed any changes to this page click on the green tick either at the top or bottom of the page.

If you wish to cancel editing the page at any time, click on the cross but please be aware this will lose any changes you have made.

If you have edited the page and clicked the green tick you will receive this message.

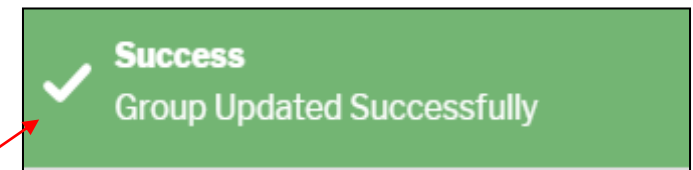
Group Content

The aim of this group is to research the history of Sandbach and its surrounding area from Roman times to the present day.

At our regular meetings we will consider the sources of information best suited to support our research. We will also review the progress on the various projects that members are involved with and share some of the interesting discoveries that come to light.

It is expected that group members will have different desired levels of involvement, ranging from those who are curious but have little spare time to conduct research to those with bags of enthusiasm and time to delve into original research of local history. It is anticipated that members of the group will conduct their own research into their chosen area of interest, working either alone, in pairs, or in small groups, and once a year will arrange for the rest of the group to visit a site appropriate to that chosen interest.

Additional meetings will be arranged on an occasional basis, which may include an invited guest speaking on a subject of

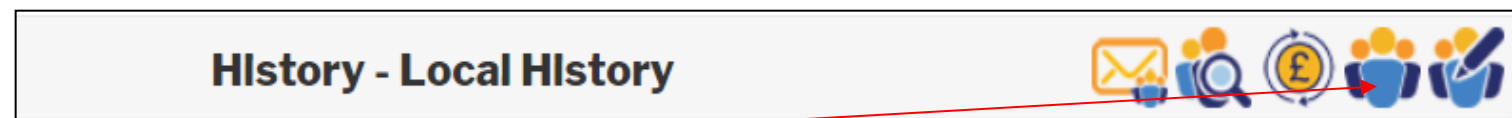


Manage Group Members

Click on the manage group members icon

The Manage Group Members page consists of 3 columns

The group size and waiting list which you have set up in the Edit Group page are shown beneath the middle and right columns



Manage Group Members - History - Local History

Group Members and Leaders

9 - Louise Adams	120 - Mike Reilly-Cooper	
3097 - Shirley Aitken		
3371 - Elsy Akerman		
Anne Anders		
116 - Jo Archer		
226 - P1 Ashton		
3101 - P2 Astles		
Chris Attwood		

Available Members (306) Members (1/30) Waiting List (0/5)

Displays the complete list of all Sandbach u3a members in alphabetical order

Displays the list of your group members, highlighted name(s) indicate group leaders/deputies

Displays your group waiting list

Manage Group Members con't

1. Add member Pt 1 -

To add members to your group click on Search Members

Type in the surname of the person you want to select, click on their name so it is highlighted

NB: You can search for members by surname, first name or U3A membership number

Manage Group Members - History - Local History

Group Members and Leaders

Search Members... X Search Members... X Save Waiting List Order

Available Members (304)	Members (3/30)	Waiting List (0/5)
9 - Louise Adams	120 - Mike Reilly-Cooper	
3097 - Shirley Aitken	122 - Gord Banks	
3371 - Elsy Akerman	Fred Crosby	
Anne Anders		
116 - Jo Archer		
226 - P1 Ashton		
3101 - P2 Astles		
Chris Attwood		

2. Add member Pt 2 - Copy this name into your group by using the right arrow or double clicking on the name

You can select multiple members at a time by holding down the Ctrl key

3. Add member Pt 3 - Continue to add all the names of the people on your register

The total number of members of your group will be displayed at the bottom of this column

Manage Group Members con't

Manage Group Members - History - Local History

Group Members and Leaders

9 - Louise Adams	120 - Mike Reilly-Cooper	
3097 - Shirley Aitken	226 - P1 Ashton	
3371 - Elsy Akerman	122 - Gord Banks	
Anne Anders	Gord Bennett	
116 - Jo Archer	102 - Ben Bloggs	
3101 - P2 Astles	14 - Fred Bloggs	
Chris Attwood	108 - Bill Butterscotch	
2511 - Chris Bailey	Fred Crosby	

Available Members (299) Members (8/30) Waiting List (0/5)

4. Group Leader – The names of the Group Leaders/Deputy Leaders have already been pre-selected. These are highlighted green and will appear at the top of the group.

NB: Any changes to the Group Leadership will need to be done by the Groups Coordinator

Group Leaders are displayed at the top of the group with other group members displayed below in alphabetical order by surname

Manage Group Members con't

5. Waiting List - Once the maximum number for the group has been reached any names selected will be automatically added to the waiting list and a message to this effect will be displayed on the screen

From u3a.simplmembership.co.uk

The Group cannot contain more than 18 members. All selected members were added to the waiting list

OK

NB: People on the waiting list can only be added to your group when there are vacancies.

6. Create a vacancy – to create a vacancy you will need to remove someone from your list or alternatively increase the size of your group in the Edit Group section

To remove a name click on it to highlight then use the left arrow to remove the name from your group

Manage Group Members - History - Local History

Group Members and Leaders

Search Members...	Search Members...	Save Waiting List Order
9 - Louise Adams 3097 - Shirley Aitken 3371 - Elsy Akerman Anne Anders 116 - Jo Archer 3101 - P2 Astles Chris Attwood 2511 - Chris Bailey	120 - Mike Reilly-Cooper 226 - P1 Ashton 122 - Gord Banks Gord Bennett 3391 - Reg Blackburn 102 - Ben Bloggs 14 - Fred Bloggs 108 - Bill Butterworth	62 - Arch Thorp 3327 - Lucy Thomas
Available Members (275)	Members (30/30)	Waiting List (2/5)

Manage Group Members con't

7. Add member from waiting list - To move someone from the waiting list into your group, highlight their name and use the left arrow

8. Manage waiting list - The waiting list puts people in first come first served order.

However you can move names up and down the waiting list by highlighting them and using the up and down arrows.

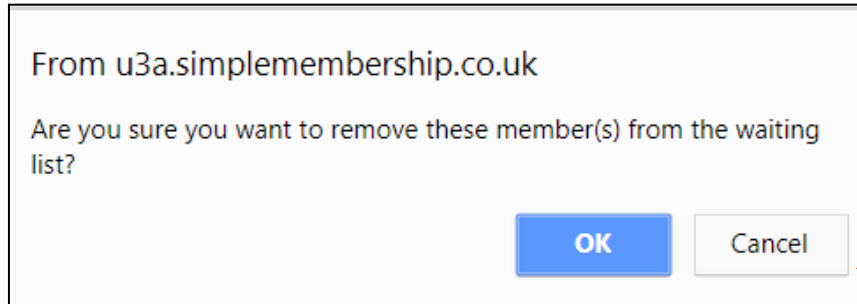
Remember to click on the 'Save Waiting List Order' button to keep the revised order.

9. Remove name from waiting list - you can remove someone from the waiting list by highlighting the name and clicking on the cross

The screenshot shows the 'Manage Group Members - History - Local History' window. It has three main columns: 'Available Members (276)', 'Members (29/30)', and 'Waiting List (2/5)'. The 'Available Members' list includes names like Louise Adams, Shirley Aitken, and Elsy Akerman. The 'Members' list includes Mike Reilly-Cooper, P1 Ashton, and Gord Banks. The 'Waiting List' list includes Arch Thorp and Lucy Thomas. A red arrow points from the 'Waiting List' to the 'Members' column, indicating the action of adding a member. A 'Save Waiting List Order' button is visible in the top right.

This screenshot shows the same interface as the previous one, but with a different set of members. The 'Available Members' list now includes names like Louise Adams, Shirley Aitken, and Elsy Akerman. The 'Members' list includes Mike Reilly-Cooper, P1 Ashton, and Gord Banks. The 'Waiting List' list includes Arch Thorp, Lucy Thomas, and Bob Testing. A red arrow points from the 'Waiting List' to the 'Members' column, indicating the action of adding a member. A red arrow points to the 'X' button next to the 'Waiting List' header, indicating the action of removing a member. A 'Save Waiting List Order' button is visible in the top right.

Manage Group Members con't



From u3a.simplemembership.co.uk

Are you sure you want to remove these member(s) from the waiting list?

If you delete a name from the waiting list you will receive a message to acknowledge that you have taken someone off the waiting list

Click OK or cancel

NB: For flexibility, the system will not actually prevent you adding more names to the waiting list than the number of places you have identified

The group page will display “Completely Full” if the number on the waiting list is at or above the identified size of the group

Group Finance

Online Payments

Please Note: For Group Finances where members may wish to pay online there is a separate guide available, "Group Finance Online Reporting Guide" which is to be read in conjunction with this guide

Click the Group Finance icon, the Finance Summary opens

1. Finance Summary –

Displays the "Group cash in Hand" and "Standard Session Fee" at the top of the box and below this "Previous Group Returns"


This includes dates of meetings, number of attendees and Bank Remittance details

Edit Group Finance icon
(No longer required and is being removed)

Add Meeting Report icon

Add Bank Payment icon

History - Local History



Group Finance - History - Local History
Print X

History - Local History - Finance Summary


Group Cash in Hand




Standard Session Fee:

£0.00

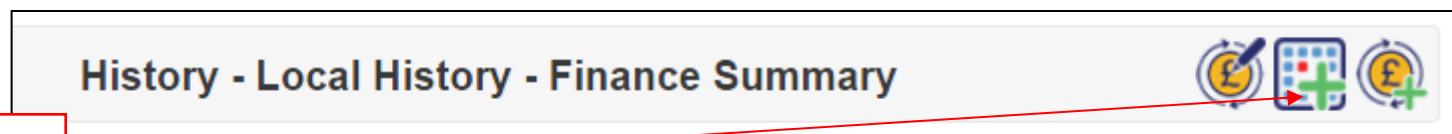
£1.00

Previous Group Returns

TYPE	DATE OF MEETING OR BANK REMITTANCE	ATTENDEES	SESSION FEES	OTHER INCOME	TOTAL RECEIPTS	BANK REMITTANCE	PAYMENT TYPE
 No group returns are available							

Group Finance con't



Click on the Add Meeting Report icon

2. Meeting Stats...

Meeting date – click on the pop-up calendar and select the date of your meeting or click in the box and simply enter the date

Number of attendees – click in the box and enter the number of people who attended the meeting

Amount collected in fees - Click in the box and enter the total amount collected at this meeting, including any prepayments for future meetings or the fee supplement charged to cover a paid speaker's fee

Notes box – Available if needed. Notes can be just for your own benefit and/or to explain unusual entries for the Treasurer's information, but please bear in mind that the Treasurer will not necessarily see the note unless you advise them directly: (treasurer@sandbachu3a.org.uk)

Group Finance con't

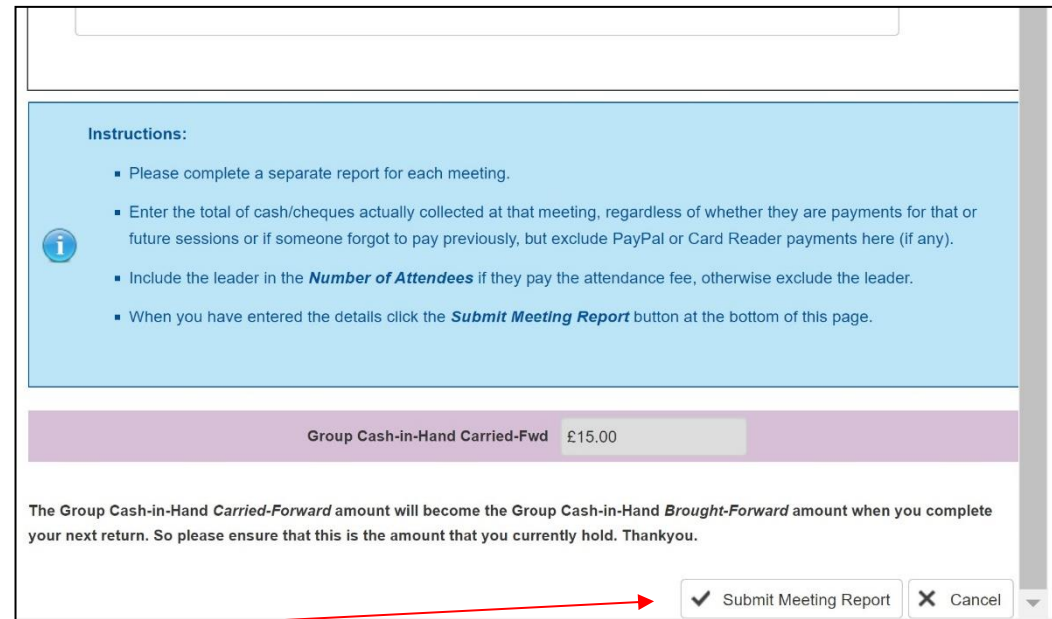
2. Meeting Stats con't...

Scroll down the page to see an Instructions section, followed by a summary of the Group Cash-in-Hand Carried-Fwd and boxes for “Submit Meeting Report” and “Cancel”

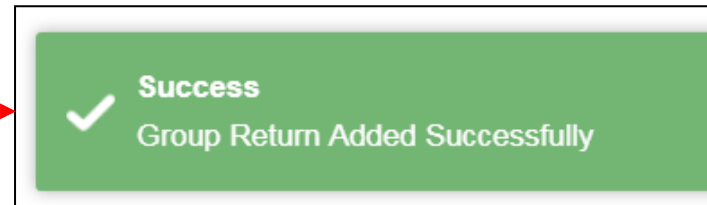
3. When you have entered the details of the meeting click “Submit Meeting Report”

NB: Please submit a meeting report *at least* once every month

4. Once you have clicked “Submit report” you will be taken back to the Finance Summary page and will receive a “Group Return Added Successfully” message



The screenshot shows a web form for submitting a meeting report. At the top, there is a light blue box with the heading "Instructions:" and an information icon. Below this, there are four bullet points: "Please complete a separate report for each meeting.", "Enter the total of cash/cheques actually collected at that meeting, regardless of whether they are payments for that or future sessions or if someone forgot to pay previously, but exclude PayPal or Card Reader payments here (if any).", "Include the leader in the **Number of Attendees** if they pay the attendance fee, otherwise exclude the leader.", and "When you have entered the details click the **Submit Meeting Report** button at the bottom of this page." Below the instructions is a purple summary bar with the text "Group Cash-in-Hand Carried-Fwd £15.00". Underneath the bar, a note states: "The Group Cash-in-Hand *Carried-Forward* amount will become the Group Cash-in-Hand *Brought-Forward* amount when you complete your next return. So please ensure that this is the amount that you currently hold. Thankyou." At the bottom right of the form, there are two buttons: "Submit Meeting Report" with a checkmark icon and "Cancel" with an 'X' icon. A red arrow points from the "Submit Meeting Report" button in this screenshot to the "Submit Meeting Report" button in the next screenshot.



Group Finance con't

PLEASE NOTE: REGISTERS & ATTENDANCE FEES

- Please complete a separate report for each of your group meetings
- Please continue to keep a group register for emergency evacuation role call purposes and to identify which members have attended meetings and the amount of money collected
- Once completed all registers should be sent to the Groups Co-ordinator
- The nominal fee shown in the attendance fee box on the group page is the basic charge per session for your group
- A new function “Groups Events” is now available on SWISH for groups who arrange any special group visits, please contact the Groups Co-ordinator for further information
- If your group uses visiting paid speakers the attendance fee for these sessions will be higher. Leaders are therefore requested to include the higher rate that members are charged in the text at the top of their Group Content page

Group Finance con't

5. Finance Summary – The statistics for each meeting entered will be displayed giving the meeting date, the number of attendees and the amount of money collected at each meeting

Group Cash in Hand is detailed at the top of the page, this is the total amount of money collected but not yet banked

History - Local History - Finance Summary

Group Cash in Hand

£100.00

Standard Session Fee:

£1.00

Previous Group Returns

	TYPE	DATE OF MEETING OR BANK REMITTANCE	ATTENDEES	SESSION FEES	OTHER INCOME	TOTAL RECEIPTS	BANK REMITTANCE	PAYMENT TYPE
		05 Oct 2018	10	£10.00	£0.00	£10.00	£0.00	
		28 Sep 2018	15	£15.00	£75.00	£90.00	£0.00	

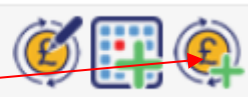
6. Corrections to the “Group Returns” statistics can be made by clicking on the ‘edit pencil’

This will bring up the original return which can be corrected with the relevant information i.e. date, number of attendees or fees collected

To update the entry click “Save Meeting Report”

Group Finance con't

History - Local History - Finance Summary



Click on the Add Bank Payment icon

7. Bank Remittance – Click on the “Amount Paid into u3a Bank Account” box and enter the money banked

8. Method of payment - Click on the drop down menu to select one of the following options:

(Please Select) ▼

- Cash
- Cheque
- Mixed Cash/Cq
- Bank Transfer
- PayPal

9. Paying-in Reference – Cash / Cheques - in this box use the group’s paying-in book, paying-in slip reference number (5/6 digit number which can be found at the bottom of the counterfoil)

9a. Paying-in Reference – Bank Transfer
Enter just your group code which is displayed to the right of the box.
Bank Account: SANDBACH DISTRICT U3A
Sort Code: 01-07-80
Account Number: 52504107

10. Date of Payment – Type the date the money was paid into the bank or select the date from the pop-up calendar

Group Finance - History - Local History

History - Local History - Add Group Bank Payment

Group Cash-in-Hand Brought-Fwd £100.00

Bank Remittance

Amount Paid into U3A Bank Account (£)

Method of payment (Please Select) ▼

Paying-in Reference

Date of Payment

Group Code: LocHist

Group Finance con't

11. Notes box – Available if needed. Notes can be just for your own benefit and/or to explain unusual entries for the Treasurer's information, but please bear in mind that the Treasurer will not necessarily see the note unless you advise them directly: (treasurer@sandbachu3a.org.uk)

12. Submit payment – Scroll down to the bottom of the page and click on "Submit Bank Payment"

13. Once you have clicked "Submit Bank Payment" you will be taken back to the Finance Summary page and will receive the message "Group Return Added Successfully"

Tai Chi - Add Group Bank Payment

Group Cash-in-Hand Brought-Fwd

£0.00

Bank Remittance

Amount Paid into U3A Bank Account (£)

Method of payment

(Please Select) ▼

Paying-in Reference

?

Date of Payment

📅

Group Code: TaiCh

Notes

?

IMPORTANT - Paying-in Reference

- For a payment using your group's paying-in book – Enter just the paying-in slip reference number. This is the five or six digit number at the bottom of [the counterfoil](#) (and not 52504107).
- For an online bank transfer – Enter just your Group Code shown above to the right of the Paying-in reference box. You also need to enter this code as the reference in your bank transfer.

Please Note: You will not be able to edit a bank payment report once you have submitted it. If you do need to amend a previous submission, please contact the Treasurer.

Group Cash-in-Hand Carried-Fwd

£0.00

The Group Cash-in-Hand Carried-Forward amount will become the Group Cash-in-Hand Brought-Forward amount when you complete your next return. So please ensure that this is the amount that you currently hold. Thankyou.

✓ Submit Bank Payment

✗ Cancel

View Group Details

History - Local History



Click on the icon to view group details

The View Group page gives details of group members, showing group leader(s) first, followed by group members in alphabetical order.

It includes their phone numbers and in case of emergency (ICE) name and contact details.

This information is captured from each members "My Profile" page so will be automatically updated if they make any changes

Group Leaders should encourage all the members of their group to check their own "My Profile" page for accuracy

Group Details - History - Local History					
Group Member Details - History - Local History					
Membership No	Name	Phone	Emergency Name	Emergency Number	
120	Mike Reilly-Cooper				
226	P1 Ashton				
122	Gord Banks				
	Gord Bennett	01270998877	Mrs Clogger	0127099887	⚠
102	Ben Bloggs				
14	Fred Bloggs				
108	Bill Butterscotch				
97	Pearl Button	01270789456	Mother (of)	01270789456	⚠
73	Fred Flintstone	01234 987456	Wilma Flintstone	07456 325841	
74	Willie Flintstone	01234 987456	Fred Flintstone	07951 348951	

1. Emergency Contact list
- To print out details of all group members click on the printer icon

Renewal Overdue Warning: This symbol is to inform you if a member's renewal is overdue. If they do not renew by the end of October, their membership will be lapsed, and they will automatically be removed from the group.

View Group Details con't

2. Attendance Register - To create an attendance register either click the pen and paper icon for the PDF version or the X icon for the Excel version. A PDF or Excel register will be downloaded onto your computer or tablet where you will be able to view and print it with a suitable application. (e.g: Adobe PDF Viewer or Microsoft Excel.)

Time

Week in Mo

Day

Venue

Attendance

Vacancies

The aim of this day.

At our regular review the pro that come to l

It is expected but have little local history. It working either appropriate to

Additional meetings will be arranged on an occasional basis, which may include an invited guest speaking on interest to the whole group. Please note that the cost of attendance for meetings when a paid guest speaker will be £2.50

Group Details - History - Local History

Group Member Details - History - Local History

Membership No	Name	Phone	Emergency Name	Emergency Number
120	Mike Reilly-Cooper			
226	P1 Ashton			
122	Gord Banks			
	Gord Bennett	01270998877	Mrs Clogger	0127099887
3391	Reg Blackburn	01274 461394		
102	Ben Bloggs			
14	Fred Bloggs			
108	Bill Butterscotch			
97	Pearl Button	01270789456	Mother (of)	01270789456
	Fred Crosby	01260555666	Joan	01270999888
74	Willie Flintstone	01234 987456	Fred Flintstone	07951 348951
67	Alice Johnson			
68	Doris Jones	01279 962908		
55	Fred Jones	01270111122		
117	Jo Jones			
1568	Bob Kelly	07888 873718		

View Group Details con't

3. Attendance Register – PDF VERSION

Three Prepay Columns

This later version has three columns on the left where the amount paid by someone who is prepaying can be written in the column that is appropriate for their payment method, either by PayPal, Cheque or Cash.

Start Date

Enter the prepay period start date

End Date/No of Meetings

Enter the prepay period end date and the number of meetings

New Format

At the time of writing the .pdf version of the downloadable group attendance registers is being revised to accommodate prepayments and will soon appear in a similar format to the image on the right.

It is anticipated that a separate paper register will be printed for each prepay period.

The Excel version will remain a simple list of group members for leaders to adapt to suit their own needs. (See next page)

Group Register: Local History Group			Start Date:		End Date/No of Meetings:	
Pre Payments			Meeting Attendance/Payments			
			Dates:			
Member	PayPal	Cheque Cash				
25 Simple Simon						
3511 Chris Bailey						
122 Gord Banks						
354 Shirley Banks						
139 Brenda Cowslip						
130 Betty Nelson						
63 Fred Oldbody						
133 Jill Ratcliffe						
528 David Smith						
104 James Watt						
3511 Chris Bailey						
122 Gord Banks						

Pay on Attendance

The payments for those who are paying on attendance at each meeting should be recorded in the appropriate columns. Please write the meeting dates in the cells provided at the top of the columns.

Email Group Members



Click on the icon to email group members

Email Group Members

Saved Draft – Your email text is auto-saved every 1min and will remain available after leaving the email page and/or logging-out. The “Continue Saved Draft” and “Delete Saved Draft” buttons become available if a draft has been saved.

Compose New Email – click on this button to take you to Email Group Members page.

Email History

Date	Subject
22 Jul 2021 20:10	Computing - Personal Laptop Group Message
22 Jul 2021 20:00	Computing - Personal Laptop Group Message
19 Jul 2021 12:36	Computing - Personal Laptop Group Message
18 Jul 2021 18:52	Computing - Personal Laptop Group Message
18 Jul 2021 18:47	Computing - Personal Laptop Group Message

Email History - Summary of last 5 emails sent to group members arranged in date order, most recent date first. Click on the blue “i” icon to view the content of the email (View content feature is being added but may not yet be available).

Email Group Members con't

1. Select sender – This will display your name as the sender.

2. Select recipients - If you want to email individual members use the Search Members box, double click or highlight their name.

Use the right arrow to add them to the recipients list in the right hand column.

3. Select recipients - If you want to e-mail all your group, click on the double arrow in the centre column this will automatically move all those group members with email addresses into the right hand column without having to select them individually.

Email Group Members

From: 120 - Mike Reilly-Cooper

To: Search Members...

Search Members...

120 - Mike Reilly-Cooper
226 - P1 Ashton
122 - Gord Banks
Gord Bennett
102 - Ben Bloggs
14 - Fred Bloggs
108 - Bill Butterscotch
07 - Gord Bennett

Group Members (15) (15 postal members)

Selected Members (0)

Members without a valid email address cannot be added as recipients

NB: The SWISH system keeps a record of emails you have sent or have received in the My Profile area, email tab

Email Group Members con't

4. Members without email -

Members without a valid email address cannot be added as recipients and their names will remain in the left column with a cross on the email symbol.

















A summary of members with email and those who are postal will be displayed at the bottom of the columns

A reminder message will also be displayed


Please keep them informed by post/phone

From: 120 - Mike Reilly-Cooper

To: Search Members... X

 Gord Bennett  97 - Pearl Button  1234 - Ben Flowerpot  64 - Fred Oldbody  65 - Fred Oldperson  3199 - Hee Yen Smith  62 - Arch Thorp  1400 - Dave Tweddell	 55 - Fred Jones  120 - Mike Reilly-Cooper  25 - Simple Simon  101 - Sue Smith  82 - Alice Testing  83 - Baz Testing  98 - Doug Whole  37 - John Williams
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Group Members (0) (15 postal members) **Selected Members (15)**

 Members without a valid email address cannot be added as recipients

Email Group Members con't

5. Group email subject heading –
Amend the text in the subject box as required

6. Group email attachments –
Add files as required by selecting the attachments button and choosing a file you want to share.

7. Group email content – Once you have selected the recipients click in the content box and type your message.

Email Group Members

From: 120 - Mike Reilly-Cooper

To: Search Members... Search Members...

Chris Attwood
242 - Jan Bailey
Fred Crosby
999 - BC Crosby
1236 - Susan Daniels
80 - Bet Davies
1234 - Ben Flowerpot
274 - Bill Forsyth

122 - Gord Banks
100 - Nutty Crunch
203 - Elise Daly
74 - Willie Flintstone
89 - Geo George
215 - Freya Gibbs
120 - Mike Reilly-Cooper
6 - Baz Hacking

Group Members (0) (19 postal members) Selected Members (11)

Members without a valid email address cannot be added as recipients

Subject: History - Local History Group Message

Attachment Select Select files to upload .jpeg,.jpg,.png,.doc,.docx,.xls,.xlsx,.pdf,.txt

Content: Type your message here

Email Group Members con't

8. Editing tools – use the editing toolbar to change font, cut and paste content, spell check, add tables, documents, images or a hyperlink etc

9. Group email send - When you have completed typing your message click on the send button at the bottom of the page

The screenshot shows an email composition interface. At the top, the 'Subject' field contains 'History - Local History Group Message'. Below it, the 'Attachment' section has a 'Select' button and a list of supported file types: .jpeg, .jpg, .png, .doc, .docx, .xls, .xlsx, .pdf, .txt. The 'Content' section is highlighted with a yellow box and contains a rich text editor toolbar. The toolbar includes icons for undo, redo, cut, paste, link, unlink, bulleted list, numbered list, decrease indent, increase indent, text color, background color, font face (set to 'Helvetica...'), font size (set to '15px'), and text style (set to 'Normal'). Below the toolbar is a text area with the placeholder text 'Type your message here'. At the bottom right of the form is a yellow 'Send' button. Red arrows point from the text boxes on the left to the toolbar and the 'Send' button.