


# MeCCa in a Nutshell



## 5. How to add a member

- 5.1. Go to the pdfa.org backend
- 5.2. Left menu – „Member“
- 5.3. „Add new“
- 5.4. Title field: name of the member (company)
- 5.5. Member status: select
- 5.6. Member Country: select
- 5.7. Save the Member with “Save Draft”
- 5.8. Joined at: use the select box
- 5.9. Note: always use the FIRST of a month
- 5.10. Member level: select
- 5.11. Member fee: numeric entry
- 5.12. Sequential ID: numeric empty
  - 5.12.1. Note: the Sequential ID can be found at the Member-Excel page
- 5.13. Linked User / Linked Products: only for corrective / subsequent use
- 5.14. Current Payment: initial payment
- 5.15. Terminated at: use the select box
- 5.16. Termination Reason: select
- 5.17. Won by: select
- 5.18. Remarks: free text field
- 5.19. Initial user: select
  - 5.19.1. Note: only valid for Thomas
- 5.20. Website: without <http://>
- 5.21. Import Freetext / Email: was just used during migration from Hetzner
- 5.22. Google Maps
  - 5.22.1. Active: mark only for full member
  - 5.22.2. Title: Company name
  - 5.22.3. Description: not used
  - 5.22.4. Address: type in as free text
    - 5.22.4.1. Then use “Geocode” to verify
    - 5.22.4.2. Then use “Reverse Geocode”
- 5.23. Right column
  - 5.23.1. Sector: select
  - 5.23.2. Featured image: select

## 6. How to add a user

- 6.1. Go to the pdfa.org backend
  - 6.1.1. Left menu – „Users“
  - 6.1.2. „Add new“
  - 6.1.3. Username: email address of the user
  - 6.1.4. Email: email address of the user
  - 6.1.5. First- and last name
  - 6.1.6. Website: no entry
  - 6.1.7. Sending email: this option is overwritten by the email notification plugin and will not be send
  - 6.1.8. Role: author
  - 6.1.9. “Add new User”
  - 6.1.10. Re-edit the user
  - 6.1.11. Go to “More Fields”
  - 6.1.12. Linked Member: select from dropdown
  - 6.1.13. User Type: select from dropdown
  - 6.1.14. Avatar: set / override the profile picture if needed
  - 6.1.15. Salutation: “Dear Tony,”
  - 6.1.16. Phone: enter the phone number if available
  - 6.1.17. Newsletter: <not used>
  - 6.1.18. callid: can be used in combination with VOIP software for an automatic appearance of the respective member-care-page according to the calling phone number
  - 6.1.19. Member of Working Group: defines the membership of the listed working groups
  - 6.1.20. To save press “Update user”
- 6.2. Go to mailchimp.com
  - 6.2.1. Click on “Lists” on the top menu
  - 6.2.2. Click on the  symbol next to “All Member with First and Last Name”
  - 6.2.3. Fill in “Email address” “First name” and “Last name”
  - 6.2.4. Mark “This person gave me the permission to email them”
  - 6.2.5. Click on “Subscribe”
  - 6.2.6. Perform these steps WITHOUT “First name” and “Last name” for the following lists:
    - German members: “Mitglieder” and “PDF Association Nachrichten”
    - Other members: “Member” and “PDF Association Newsletter”
- 6.3. Go to Google Groups / “My groups”
  - 6.3.1. Click on “Manage” underneath “PDF-CC-intern”
  - 6.3.2. On the left-hand menu click on “Direct add members”
  - 6.3.3. Fill in the email address and a welcome message
  - 6.3.4. Click on “Add”