

# Group Leader and Contacts

*(Last Reviewed 11th Nov 2023)*

## Leader and Contact Overview

The Leader and Contact screen allows groups to name any number of leaders/contacts and be flexible in describing their roles. For each member taking a role, there are some 'Yes/No' choices as to where their information is included and what contact information is made public.

## Group Roles

Other than 'Leader' the group roles are simply descriptive - the role name will show up in certain places described below. If any group would like a name not currently offered, please contact the webmanager. NB in the descriptions below please treat the term 'contact' as representing any leader, treasurer, any other role.

## Group Management

Any contact that you add to your group will be able to manage all the group information on this administration site. A new contact may not yet have a login to the administration site - please check with the webmanager as need be.

## Contact Preferences - the Yes/No choices

These preferences fall into two categories :

- Where should a given contact's information be included?
- Does the contact want to display their email and/or phone number in public?

### Include in Leader Emails

'Yes' will mean that contact's email will be included in group leader distribution lists. It's fine to have as many people as you like clicking 'Yes' to this choice.

### Include on Group Web Page

'Yes' will mean this contact is shown on the group web page. Again, feel free to select 'Yes' for as many contacts as you like. In practice, you should ensure at least one contact has yes shown - otherwise anyone looking at your page would not know who to contact... If you want to fine tune what this means for your individual group, then you can include this in the general text of your web page.

### Include in Group Directory

'Yes' will mean this contact is included in the group directory. Please only set any one contact to 'Yes' here - see the Group Directory help page for general discussion around this.

## Display email

'Yes' means the contact's email will be shown on the web page and/or group directory. The email will be the one we have recorded for the individual on the membership system.

## Display phone

'Yes' means the contact's phone will be shown on the web page and/or group directory. The number will be the one we have recorded for the individual on the membership system.

## Adding, Editing and Removing Contacts

Clicking the [Add New Contact](#) button will take you to a screen where you can search for members by their name, email or member.

Once you have found your member, clicking the add person will add that member as a contact for your group. They will be given a default role of 'Contact' and all choices will default to 'No'

The various 'Yes/No' choices can be made by clicking the [Edit Contact](#) button.

Removal is as simple as clicking the [Remove Contact](#) button. You will be asked for confirmation.

## Summaries and Example usage

Please see the separate help examples item for further discussion