



Flexible Membership Software

[Member Profile - Member update own details](#)

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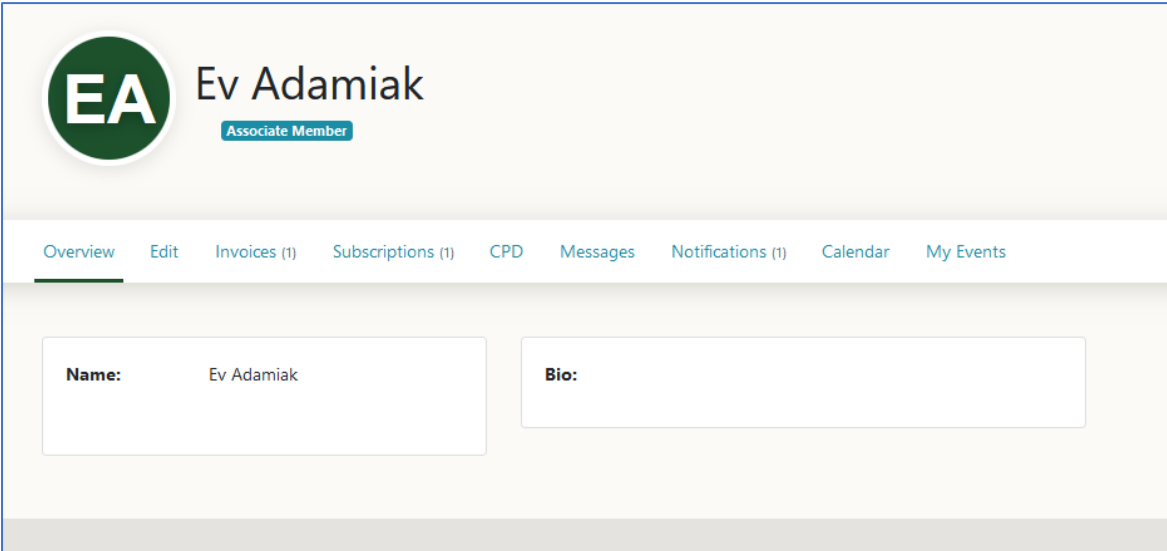
Overview

Gecco is the Member Management Solution used by your professional body to manage its membership. It provides you with the ability to keep your own information up to date thereby ensuring your administrators have the most up to date information to hand when working for you.

When you first log in to Gecco you will be redirected to your **Profile page** (see image below). This is where all your information is stored. At the top left of the page is a round icon which probably will contain your initials. Next to this is your name. Under your name is your current membership.

Below this is menu of the various items you can access to view and/or edit. The standard Gecco areas are listed below. Your organisation may not use all of these. For example, not all organisations will use the CPD option.

- **Overview:** The Overview is the Profile home page. It can list basic contact information and a short biography.
- **Edit:** This section is where you can change your password, edit your name, date of birth, and bio. There are also sections where you can update
 - Contact information - email addresses, phone numbers, job title, and social links.
 - Addresses - physical and postal mailing addresses.
 - Dietary information - used for conferences and other events.
 - Demographics - ethnicity and iwi information.
 - Organisations - any organisations you may belong to or work for.
- **Invoices:** Lists any invoices you may have along with their status.
- **Subscriptions:** Lists any subscriptions you have and your subscription history.
- **CPD:** Continuing Professional Development. This may be listed using another name.
- **Messages:** This section contains any emails which have been emailed from within Gecco to you. The emails will go to the primary email address listed in your account and they will also appear here for easy access.
- **Notifications:** System alerts will appear here. These will alert you to things like new Invoices, subscriptions, requests from other members (if allowed), and so on.
- **Calendar:** This is a calendar of events.
- **My Events:** Any events you have registered for will be displayed here.



EA Ev Adamiak
Associate Member

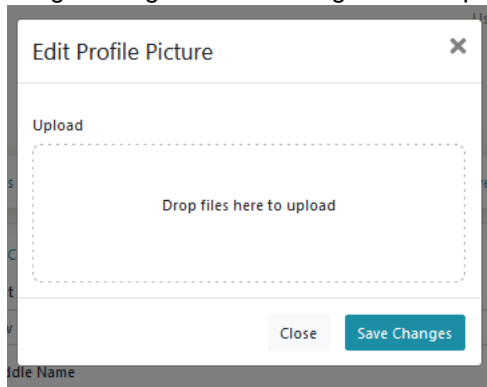
[Overview](#) [Edit](#) [Invoices \(1\)](#) [Subscriptions \(1\)](#) [CPD](#) [Messages](#) [Notifications \(1\)](#) [Calendar](#) [My Events](#)

Name: Ev Adamiak

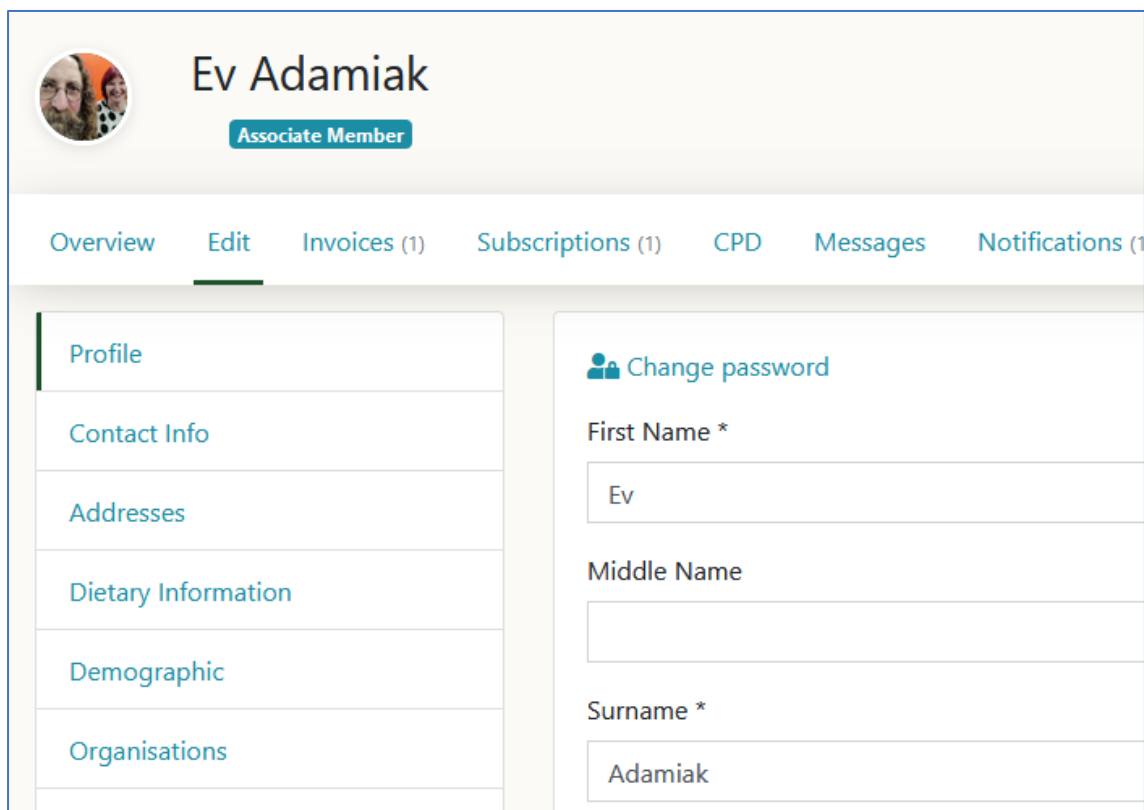
Bio:

Upload a Profile Image

If you click on the Round icon next to your name, you will be prompted to upload a profile image. Drag a suitable image into the provided field and click the **Save changes** button.



Your profile screen should be updated to reflect the upload. If it doesn't, it is likely your file was too big. Resize the file so that is around 1000 pixels wide at the most and try again.



Edit Tab

Profile overview

This consists of a left hand menu, a middle panel containing your immediate details, and a profile history panel to the right. If you run your cursor over the Profile Changes, you will see a list of fields which were updated on those dates.

Overview **Edit** Invoices (1) Subscriptions (1) CPD Messages Notifications (1) Calendar My Events

Profile

Contact Info

Addresses

Dietary Information

Demographic

Organisations

Qualifications

Change password

First Name *

Middle Name

Surname *

Preferred Name

Date of Birth

Bio

Tell us a bit about yourself

Colour

Select your favourite colour. This colour will be used to highlight elements in the interface

Display profile to public Your profile overview page will be publicly accessible

Display profile to members Other members will be able to view your profile overview page

Save Changes

Profile Changes

Jul 15, 2020, 3:16 PM
Jul 14, 2020, 10:42 AM
Jul 14, 2020, 10:42 AM
Jul 14, 2020, 10:40 AM
Apr 12, 2019, 11:26 AM
Apr 8, 2019, 9:49 AM
Apr 8, 2019, 9:06 AM
Jan 22, 2019, 1:10 PM

Change password

At the top of the details panel is a link to change your password. Clicking on it will take you to the **Change password** screen. Enter your old password in the top field and then your new password and the confirmation of your new password in the next fields. Click the **Change Password** button to save the password. If successful, you will be redirected back to your profile page. If not, you will be advised why (current password doesn't match, new passwords do not match, and so on) and will remain on the Change password page.

You can change your password below.

Your old password

New Password

Confirm New Password

[Change Password](#)


[Back to home page](#) [Contact us](#)

Profile

In this form you can edit your name, add your date of birth, select a colour, and set profile permissions.

- Name and Dob fields are self explanatory.
- **Colour:** This is the colour that is displayed in the circular icon at the top left of your profile page. If you have selected an image, changing this colour will have no effect.
- **Bio:** A self description.
- **Display profile to public:** Your profile overview page (only this page) can be viewed by members of the public *if* they have the correct link.
- **Display profile to members:** Your overview page is visible to other members. They can find you by clicking on the Gecco top level menu item, **Users**.

Click the **Save Changes** button to save your changes.

 [Change password](#)

First Name *

Middle Name

Surname *

Preferred Name

Date of Birth

Bio

This is a small bio describing what I do which is, currently, fairly dull as I am writing documentation!

Tell us a bit about yourself

Colour

1c512c

Select your favourite colour. This colour will be used to highlight elements in the interface

Display profile to public Your profile overview page will be publicly accessible

Display profile to members Other members will be able to view your profile overview page

[Save Changes](#)

Contact info

This form allows you to update your contact details. Each field has **Display** tickbox to the right of it. Selecting this will display that item on your **Profile overview** page. Click the **Save Changes** button to save your changes.

Primary Email*

eadamiake8@cnn.com.fake Display

This is the email you use to sign in to the site. You will also receive site communications via this email.

Secondary Email

Display

Primary Phone

0292232114774 Display

Secondary Phone

Display

Mobile

Display

JobTitle

General Layabout Display

Social

Website

Display

LinkedIn

Display

Facebook

Display

Twitter

Display

[Save changes](#)

This is the **Profile Overview** page after the above changes were saved.

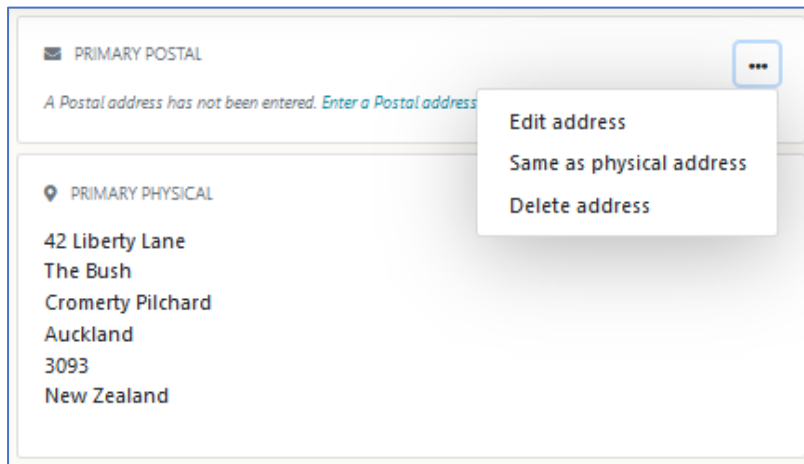
The screenshot shows the profile overview for Evelyn (Waugh) Adamiak, an Associate Member. The page includes a navigation menu with options: Overview, Edit, Invoices (1), Subscriptions (1), CPD, Messages, Notifications (1), Calendar, and My Events. The main content area is divided into two sections. The left section contains contact information: Name: Evelyn (Waugh) Adamiak, Email: eadamiake8@cnn.com.fake, Job title: General Layabout, and Phone: 0292232114774. The right section contains a bio: "This is a small bio describing what I do which is, currently, fairly dull as I am writing documentation!"

Addresses

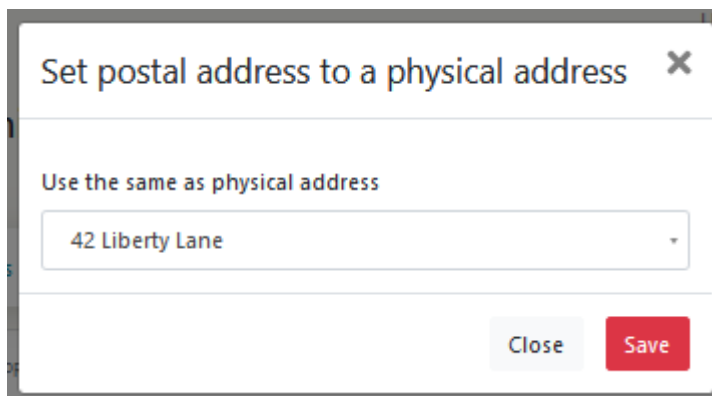
This section lists any addresses stored with your data. There are two address types by default - Primary Postal and Primary Physical. If you do not have an address in these areas, you can click the **Enter a Postal/Physical address** link. This will display the form for that address type. Completing the form and saving it will save the address as the *Primary* address for that type.

The screenshot shows the 'Addresses' section of the profile overview. On the left is a navigation menu with options: Profile, Contact Info, Addresses (selected), Dietary Information, Demographic, Organisations, and Qualifications. The main content area displays two address types: PRIMARY POSTAL and PRIMARY PHYSICAL. The PRIMARY POSTAL section shows a message: "A Postal address has not been entered. Enter a Postal address". The PRIMARY PHYSICAL section shows the following address: 42 Liberty Lane, The Bush, Cromerty Pilchard, Auckland, 3093, New Zealand. A button labeled "Add a new address" is located in the top right corner.

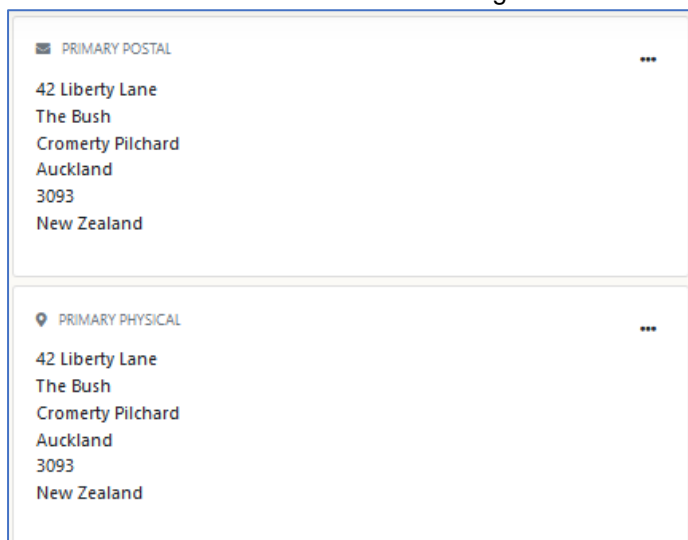
If you have one address entered and you want the other primary address to be the same, click on the three dot menu to the right and select **Same as [addresstype] address**.



A small popup will open asking you to confirm this change:



Click the **Save** button to confirm the change. Your address information will be re-displayed:



Additional addresses

You may have more than one address you need to add or your administrators may have set up additional address types which may need to be added. To do this click on the **Add a new address** button at the right hand side of the address panel. This will open the **Add a new address** form. This is a pretty standard form. The first field sets the Address Type. This will contain Physical and Postal address types as a minimum. Any other address types set up by your administrators will appear in this field.

Select the desired address type and complete the rest of the fields as required. Click on the **Add address** button to save the new address.

Add a new address ✕

Type *

Street 1

Eg. Company Name, Attn:

Street 2

Street 3

Suburb

Town / City *

State / Region

Post code

Country *

Dietary Information

The central panel on this page displays any dietary information stored in your account. Click inside the **Dietary needs** field to select your dietary requirements. If you have any that are not listed, please enter them in the **Other dietary needs** field. Click the **Save changes** button to save the new data. You can remove any items by clicking the small **x** to the left of the diet type name.

Please select your dietary needs from the list below, if your dietary need is not in the drop-down list please enter it in other dietary needs.

Dietary needs:

× Gluten Free

Other dietary needs:

[Save changes](#)

Demographic

This area is where you can define demographics such as ethnicity, Iwi, and gender. Click inside the Ethnicity and Iwi fields to select the relevant information. Select the Gender by selecting one of the available options. Click the **Save changes** button to save the new data. You can remove any items from the Ethnicity and Iwi fields by clicking the small **x** to the left of the relevant entry.

Ethnicity

Select all that apply

×NZ Maori ×Pakeha

Iwi

Select all that apply

×Ngā Mahanga a Tairi

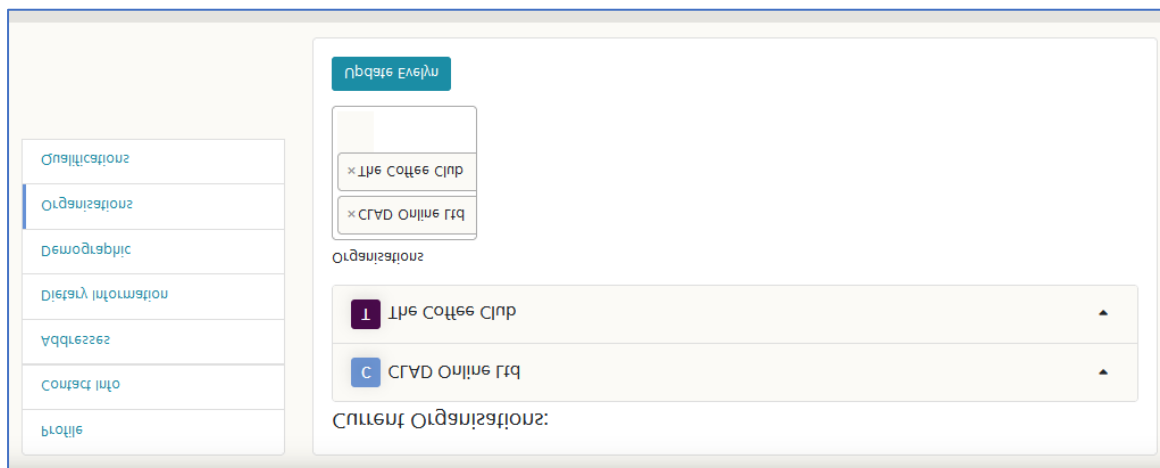
Gender

Male
 Female
 Neutral
 Transgender
 Other
 Prefer not to say
 Decline to answer

[Save changes](#)

Organisations

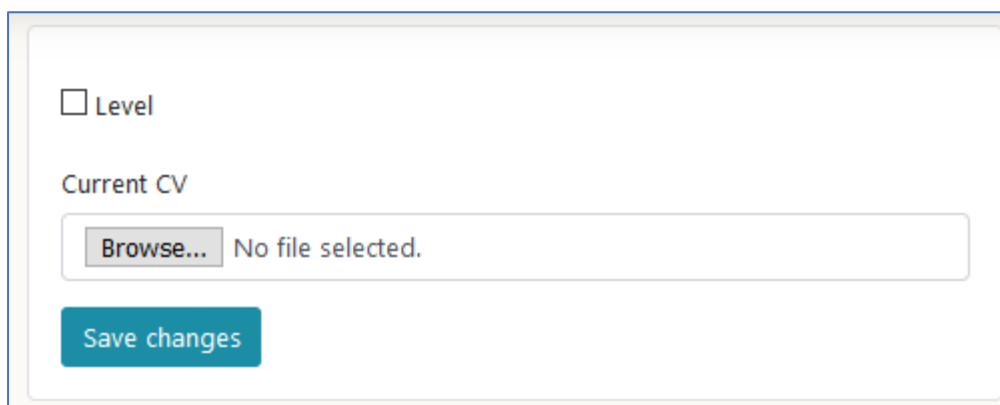
The Gecco administrators may have enabled the Select Organisation facility. This allows you to select the organisations you are associated with. This is particularly relevant for employer information. At the top is a list of organisations you are associated with (if any). Below that is the field you use to select organisations. Click inside this field. A list of organisations will be displayed. Select any that are relevant to you and click the **Update <name>** button to save the list. You can remove any organisations by clicking the small **x** to the left of the relevant entry.



Qualifications

The default field allows you to upload document to store against your profile. The area is labelled **Current CV** but you can store any document in this section. Your professional body may have specified changes to this area. If this is the case, this document cannot provide any direction around completing this section. You will need to contact your administrators for further information.


Click on the **Browse** button to select a file to upload. Click the **Save changes** button once the file has uploaded to save it.



You can remove or replace the file by clicking either of the buttons to the right of the document name. You will need to click the **Save changes** to save your changes.

Level

Current CV


 Eveylyns-CV.docx 12 KB

[Replace](#) [Remove](#)

[Save changes](#)


Invoices

This section lists any invoices you may have. Any unpaid invoices will be noted with an **Outstanding** as their status.

 Evelyn (Waugh) Adamiak
Associate Member

Overview Edit **Invoices (1)** Subscriptions (1) CPD Messages Notifications (1) Calendar My Events


Invoices - Outstanding Balance: \$150.00

MEMBER	ISSUED	DUE DATE	AMOUNT	STATUS
 Evelyn Adamiak Inv. #: 123	Jul. 14, 2020	14 Days Ago	\$150.00	Outstanding

Clicking on an invoice will open it giving full details. You can download the invoice as a PDF by clicking on the **Download invoice** button on the right hand side of the screen.

You can pay the invoice by clicking on the **Pay Via Credit/Debit Card** button at the bottom.

My Invoices Invoice 123

 Evelyn (Waugh) Adamiak

Invoice Number: 123 Invoice to: Evelyn (Waugh) Adamiak

Purchase Order:

Item	Qty	Total (excl. GST)
Association Membership Subscription <small>Annual subscription for associate members</small>	1	\$130.43
	Subtotal	\$130.43
	GST	\$19.57
	Total	\$150.00

Due: Aug 20, 2020

Subscription
Associate Member
Jul 14, 2020 - Jul 14, 2021
Created Jul 14, 2020, 10:42 AM

\$150.00 outstanding

Last Edited: Jul 14, 2020, 10:42 AM

Invoice status: **AUTHORISED**


[Download invoice](#)

[Pay Via Credit/Debit Card](#)

The payment method will depend on what payment system has been set up by your administrators. The below screen grab is displaying the **Stripe** payment method. Stripe is an online gateway which has been fully integrated with Gecco. Other payment gateways will require you to enter your details into different information window types.

Complete the payment form and follow any instructions to complete the payment.

Please note: Your credit card details are NOT stored within Gecco. No record of any CC details will be kept.

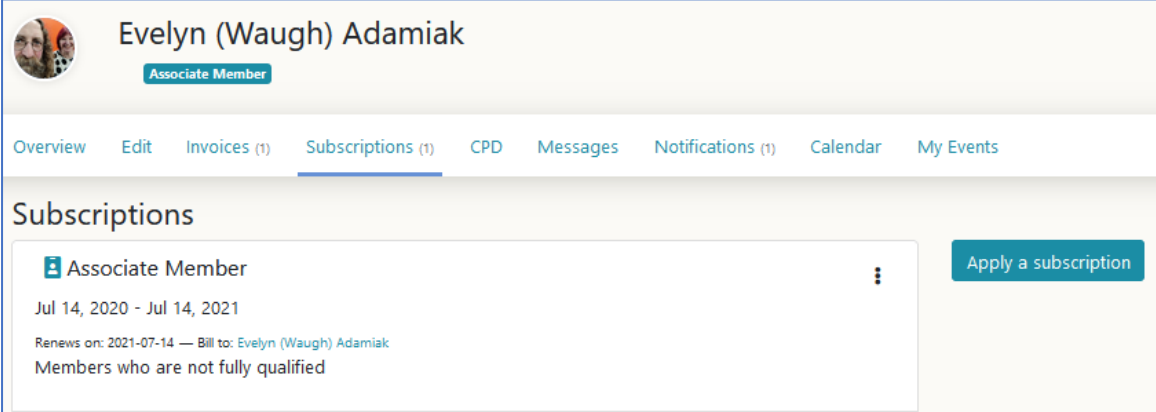


The screenshot shows a payment interface. On the left, there is a form with a 'Name' field containing 'Jane Doe', a 'Card' section with a 'Card number' field and a 'MM / YY CVC' field, and a teal 'Pay' button. On the right, there is an invoice summary for 'Invoice # 123' billed to 'Evelyn (Vaugh) Adamiak'. The summary includes: Invoice Total: \$150.00, Stripe Charge: \$4.79, and Total to pay: 154.79.

Subscriptions

Any subscriptions you may have will be listed on this screen. Information listed includes

- Subscription name
- the Start and End dates of the subscription period
- Renewal date
- Description of the subscription.



The screenshot shows a user profile for 'Evelyn (Vaugh) Adamiak', an Associate Member. The navigation menu includes Overview, Edit, Invoices (1), Subscriptions (1), CPD, Messages, Notifications (1), Calendar, and My Events. The 'Subscriptions' section is active, showing a subscription for 'Associate Member' from Jul 14, 2020 to Jul 14, 2021. It notes the renewal date as 2021-07-14 and the bill to 'Evelyn (Vaugh) Adamiak'. A note states 'Members who are not fully qualified'. There is a teal 'Apply a subscription' button to the right of the subscription card.

The three dot menu to the right of a subscription allows you to view any invoice that may be associated with the subscription. Selecting **View invoice** will redirect you to the relevant invoice - in this case, the invoice listed above under the **Invoice** section.

Subscriptions

Associate Member

Jul 14, 2020 - Jul 14, 2021

Renews on: 2021-07-14 — Bill to: Evelyn (Waugh) Adamiak

Members who are not fully qualified

View invoice

Your administrators may have enabled the **Apply a subscription** facility. If so, you will be able to add yourself to selected subscriptions. These could be mailing lists, Special Interest Group, and so on. They may or may not generate an invoice when applied.

Click on the **Apply a subscription** button to open the form.

Apply a subscription [X]

Select a subscription to apply from the dropdown below. Your subscription will begin from todays date (Sep 2, 2020)

Subscription

[Dropdown menu]

Close Create Subscription

Select the subscription you wish to apply from the drop down. Please note that some subscriptions may incur a charge when applied. Click the **Create Subscription** button to apply the new subscription to your account.

Apply a subscription [X]

Select a subscription to apply from the dropdown below. Your subscription will begin from todays date (Sep 2, 2020)

Subscription

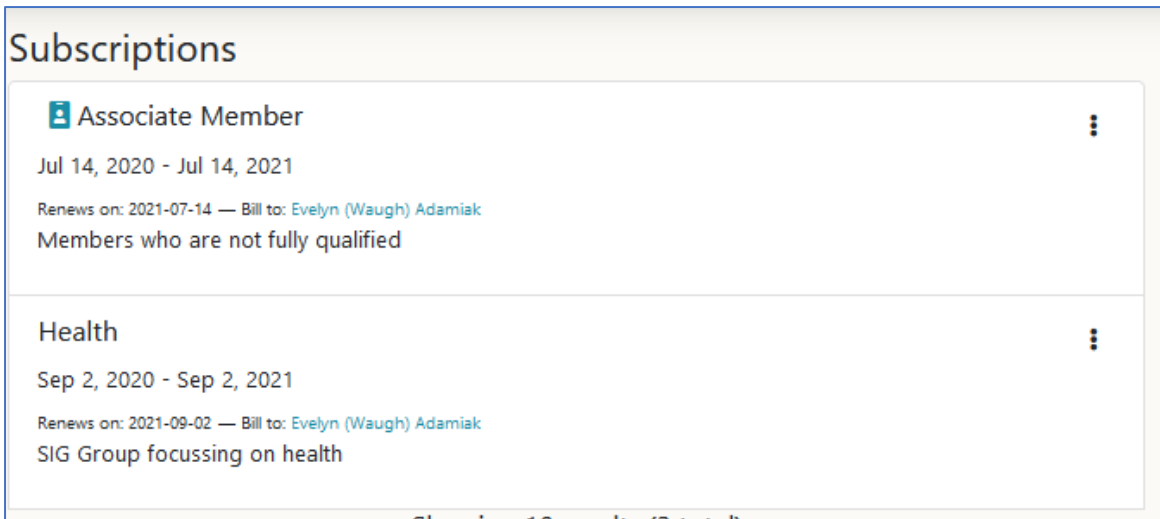
[Dropdown menu]

Others

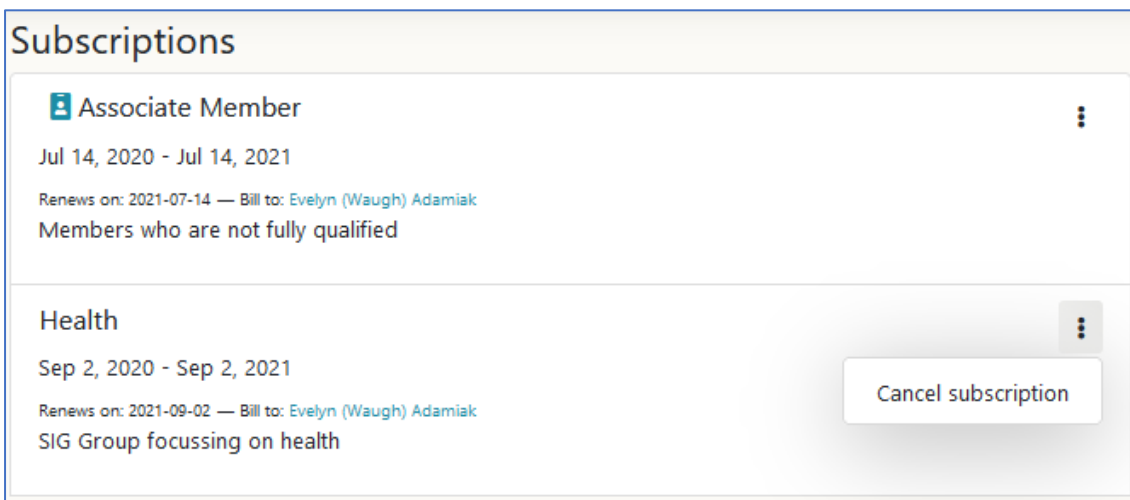
- Newsletter (\$0.00 / Renews: July 1 Yearly)
- Health (\$0.00 / Renews: August 11 Yearly)
- Wealth (\$0.00 / Renews: August 11 Yearly)

Close Create Subscription

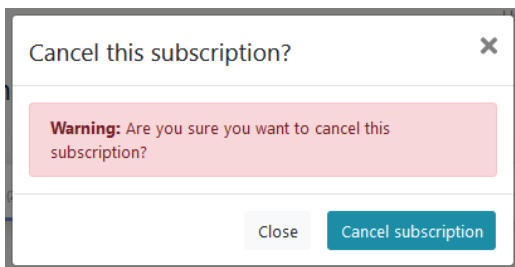
The Subscription screen will be redisplayed with your new subscription listed. If there is a cost associated with the subscription, an invoice will be generated. This will be available under the **Invoices** tab.



You can cancel any subscriptions you may have applied to your account by clicking on the three dot menu to the right of the subscription details. This will display the **Cancel subscription** option.



Clicking the option will open a confirmation prompt. Click the **Cancel subscription** button to cancel it.

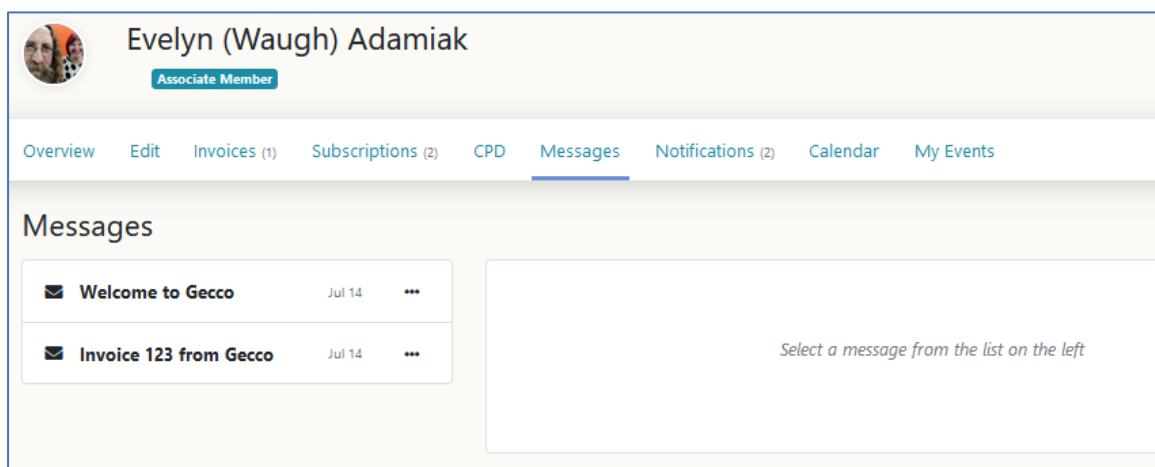


CPD

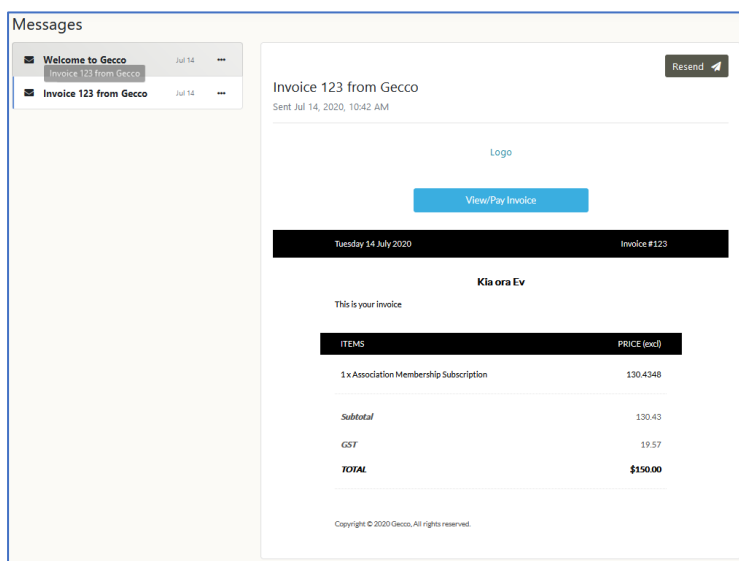
Gecco has a basic CPD module. However, if your professional body does require CPD, it is likely this section will be heavily customised to suit the requirements stipulated by your professional body. It is beyond the scope of this document to describe how a customised CPD section works.

Messages

The Messages section lists all emails that Gecco has sent you. While you will (or should have) received the email in the inbox for your primary email address, Gecco keeps a copy on the system to ensure they are easily available to you.



Clicking on a message will open it. You can resend the message to your primary email address by clicking **Resend** button. If the message contains an invoice, a button to pay the invoice will be included (**View/Pay Invoice**). This will take you to the same invoice payment screen as described above.



Notifications

Any actions which may affect you will generate a notification. These appear under the **Notifications** tab. You can view current notifications or by clicking on the **Dismissed Notifications** to the right, older already viewed notifications. In the screenshot you can see the **Health** subscription I subscribed to when writing the **Subscriptions** section of this documentation.

Clicking on the **View Notification** link will take directly to the associated tab. ie. Clicking on the link next to the **Subscription Created** notification will open the relevant subscription in the **Subscriptions** tab. Clicking on the **Invoice created** link will open that invoice.

If you click the **Dismiss Notification** link, the notification will be removed from the screen and will only be available under **Dismissed Notifications**.

The screenshot displays a user interface for a professional development platform. At the top right, the user's name 'Evelyn Adams (Wangh)' is shown next to a profile picture. Below this is a navigation menu with items: Overview, Edit, Invoices (1), Subscriptions (5), CPD, Messages, Notifications (5), Calendar, and My Events. The main content area is titled 'Notifications' and contains two notification cards. The first card, dated 2020-08-05 14:07:17, is titled 'Subscription Created' and states 'Subscription "Health" was added to your account.' The second card, dated 2020-07-17 10:45:23, is titled 'Invoice Created' and states 'Invoice 123 created - View and pay online'. Each card has 'View Notification' and 'Dismiss Notification' links. On the left side of the notifications area, there are two tabs: 'Current Notifications' (active) and 'Dismissed Notifications'. At the bottom of the notifications list, it says 'Showing 10 results (5 total)'.

Calendar and Events

This section is lacking any real functionality and is currently undergoing a rewrite. Future facilities will display upcoming events in the calendar and list any events you have registered for.

End of documentation.