

System Enhancements, Changes – To be deployed W/C 15th September

1. Auto Lapsing

Any individuals with membership schemes that are historical (renewal date is in the past) will be removed from the Membership List and entered into the Lapsed Members Grid (and Everyone)

Moving forward any individuals memberships that expire will auto lapse and the individual will be added to the Lapsed Members grid ONLY.

Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Filters
Under 15 Youth Boys	Testing	123	1586185	Inactive	28/06/2013	

To update the member it is necessary to 'Buy a Membership' for the Lapsed Member

To complete this process, select the individual or multiple individuals that require the same membership scheme

<input checked="" type="checkbox"/>	Under 15 Youth Boys	Testing	123	1586185	Inactive	28/06/2013	
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Select 'Buy Membership'

RugbyFirst Training RFC	Selected 1	Add To Group	Export	Send eMail	Buy Membership	More
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Select the Membership Scheme the individual is going to be assigned (If membership schemes are not up to date or don't reflect the current memberships at the club, these can be created in the finance module)

RugbyFirst Training RFC > New Membership Next

Select Scheme

Filters

Adult Junior Family

Social	Adult Player (...)	Women Player
£0 Social General Social Member	£5 Adult Player (Non Registered) Adult Player (Non Registered)	£5 Women Player Women Player

Confirm the order

RugbyFirst Training RFC > New Member

Summary

Membership Scheme

Membership

Name
Adult Player (Non Registered)

Description

Unit Price
5.000

Members

Testing 123
D.O.B:09/01/1999

Place Order

At this point the user is prompted to either 'Pay Now' or 'Pay Later' (Pay Now makes them a fully paid up member of the club and they will be inserted into the membership list. Pay Later, sets their membership to Pending. The individual will then appear in the Pending Grid, with an outstanding balance. (Please bear in mind that if Pay Later is selected, the user will be required to add the payment against the individuals once they are happy the membership has been settled by the member. This is completed by going into the Pending Grid, finding the individual, selecting the outstanding balance and pay now.)

Order Summary

Pay Now Pay Later

Payment

Method

Please check the order items below and the final payment amount.
Click the pay button to continue.

Cash Cheque

Other

Online payments are not currently configured for this club.

Payee

* First Name * Last Name
Testing 123

* Email (0/200)

Billing Address

Country

* Postcode
TW2 7BA

Number
200

Building

* Address
Whitton Road

* City
Twickenham

County

The user will then submit the membership.

The member has then been updated and they will now appear in either the Membership List or Pending.

(If the scheme is free and does not have a cost incurred, then the payment screens are bypassed and will automatically appear in the Membership List once completed)

This process can also be completed in bulk by inserting multiple ticks against a number of lapsed members and buying a membership for all of them (Please bear in mind that the greater number selected, the longer the process will take)

If buying memberships for multiple individuals (bulk buy) it is important to note:

- Bulk Buy Membership can only apply a single Scheme – different schemes can't be handled by the system. The individuals selected will all have to be selected the same scheme.

2. Update Status

Statuses are being amended to reflect the new grid structure in GMS.

New GMS Status	Previous Statuses	Which Grid will they appear
Active	Full & Enquiry	Membership List & Everyone
Inactive	Lapsed & Suspended	Lapsed & Everyone
Pending	Pending	Pending & Everyone
Archived	Archived, Deleted & Deceased	Non Members & Everyone

- Active – Any individual with a current (active) membership assigned to them
- Inactive – Any individual whose membership has expired (renewal date is historical) or the club has manually assigned the status of inactive.
- Pending – Any individual who has an outstanding balance owed to the club ('Pay Later') or has manually been updated to have the status of Pending
- Archived – The club must assign the status for an individual to be archived.

3. Select All

Select all enables the clubs/CB's the ability to select a group of individuals and then perform an action i.e. Email/Export

RugbyFirst Training RFC

First Name	Last Name	RFUID	Date Of Birth	Ad
	er	1581227	09/01/1979	20
		1146147	14/08/1970	3 R
	egistrar	1057727		
	egistrar	1057720		

Once selected you can then select Email and Export

4. Adding Relationships, Display of Memberships and Deletion of Memberships

Previously relationships could only be created when Registering a Youth Player and including parents details.

The system will now allow you to add relationships manually. To complete this, select the two individuals you want to assign the relationship to.

Jelly Bellies Selected 2 Add To Group Export Send eMail Request Payment More

Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Balance	Membership Number	Filters
2 Year Membership	Sonny	Bassett	1062811	Active	30/09/2014	0.00		
2 Year Membership	Joe	Bloggs	1460108	Active		0.00	226328441	
dd	Paul Test	Chorley	813370	Active	13/08/2015	0.00		
dd	Paul	chorley test	609682	Active	01/01/2016	0.00		
2 Year Membership	Duke	Earl	1136154	Active	02/10/2015	0.00		
dd	James	Foreman	788153	Active	01/01/2016	0.00		

Select 'More' and 'Add Relationship'

Jelly Bellies Selected 2 Add To Group Export Send eMail Request Payment More

Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Balance	Membershi	
2 Year Membership	Sonny	Bassett	1062811	Active	30/09/2014	0.00		
2 Year Membership	Joe	Bloggs	1460108	Active		0.00	226328441	
dd	Paul Test	Chorley	813370	Active	13/08/2015	0.00		
dd	Paul	chorley test	609682	Active	01/01/2016	0.00		

- Add Relationship
- Apply For DBS
- Remove From Club
- Update Membership
- Merge

Outline what relationship type will be held.

Add Relationship Save Cancel

Relationship

Paul Test Chorley is the of Joe Bloggs

- Parent
- Charge
- Child
- Husband
- Guardian
- Partner
- Business Contact
- Sibling
- Wife
- Fiance

Once the relationship has been created, via the grids it is now possible to see relationships without having to drill down on the individuals details.

Jelly Bellies New Member Export Send eMail

Membership Type	First Name	Last Name	Relationships	Filters
2 Year Membership	Sonny	Bassett	Child of Ben Bassett (1062813), Child of Berta Bass ...	
2 Year Membership	Joe	Bloggs		
dd	Paul Test	Chorley		
dd	Paul	chorley test		
2 Year Membership	Duke	Earl	Child of John Earl (1136155)	
dd	James	Foreman	Other of John Perrin (477395)	

It is also possible to delete a relationship. To do so, select the individual that the relationship needs to be removed from (select the name)

Jelly Bellies New Member Export Send eMail

Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Balance	Membership Number	Filters
2 Year Membership	Sonny	Bassett	1062811	Active	30/09/2014	0.00		
2 Year Membership	Joe	Bloggs	1460108	Active		0.00	226328441	
dd	Paul Test	Chorley	813370	Active	13/08/2015	0.00		

Once selected go to Relationships, select the relationship to remove & delete

Membership List en-GE

Joe Bloggs Selected 1 Export Delete

RFUID	Description	Date of Birth	Type	Valid from	Valid to	Comments	Filters
1062813	Ben Bassett is the Parent of Sonny Bassett		Parent	28/10/2009			
1573963	Berta Bassett is the Parent of Sonny Bassett		Parent	10/04/2013			

The relationship has been removed.

Joe Bloggs Selected 1 [Export](#) [Delete](#)

✓	RFUID	Description	Date of Birth	Type	Valid from	Valid to	Comments	Filters
✓	1573963	Berta Bassett is the Parent of Sonny Bassett		Parent	10/04/2013			

AOB

- 1. Club Websites are still available for all RFU member clubs and Constituent Bodies. The sites link directly into the GMS system. If you are interested please contact info@first-sports.com