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.

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

 Select 'Buy Membership'

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)

Confirm the 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.)

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

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.

Select 'More' and 'Add Relationship'

Outline what relationship type will be held.

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.

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)

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

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