



GAME MANAGEMENT SYSTEM (GMS)

PEOPLE GUIDE

TEAMWORK RESPECT ENJOYMENT DISCIPLINE SPORTSMANSHIP

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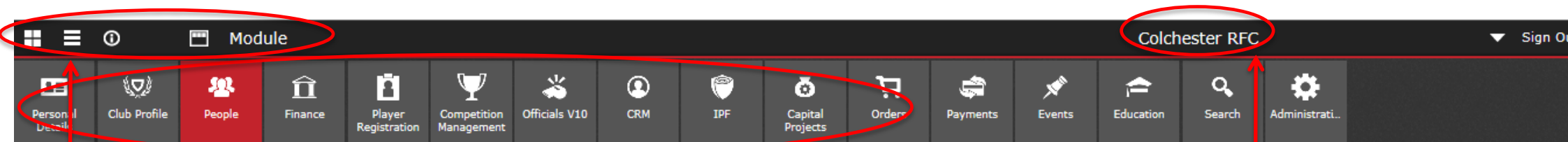


PEOPLE

1. HOME – THE DASHBOARD

1. People – Home – The Dashboard

The header displays some important information and possible navigation options for the user, including:



Functions allow the user to return to the tile page and expand and minimise icons on the page.

TIPS

The role you are assigned on the system determines what you can and cant do. Roles provides you with certain privileges. Without having a role assigned to you, access will be limited

Selecting Module will display any other modules that the user has access to. i.e. If the individual also has the role of Registrar at the club, then Player Registration will be one of the Modules available.

The current club being viewed will be displayed, however you can navigate to different clubs via a type and search.

1. People – Home – The Dashboard


The top of the dashboard is allocated to salient club details, including:

- Club Name
- Club Level
- Address
- Contact Details
- DBS Expiries in the last 3 months – This is hyperlinked, selecting this option will load the individuals this applies to
- New individuals added in the last month - Individuals currently with no membership type. This will include Players, Parents, Individuals on courses that didn't have an affiliation to the club
- Lapsed Members in the last 2 months - Links through to membership types that have expired in the past month. From here a new membership can be assigned

The club data is generated by the information that has at some point been loaded by the club administrator. The data comes from an area of the system called “Edit Details” once input, this is then displayed on the landing page.

If any of the information is found to be incorrect, select Club Profile and Edit Club from the menu and this will redirect the user to the pages where the information displayed can be edited.

Profile



Colchester RFC

League

London 1 North (level 6)

Website

<http://www.bbc.co.uk/>

Website

Address

University Playing Fields

University of Bristol

Coombe Lane

Stoke Bishop

Colchester

BS9 2BJ

Email

5732620@first-sports.com

Status

DBS Expiries

> due within 3 months

68

New

> Individuals

In the last month

0

Lapsed

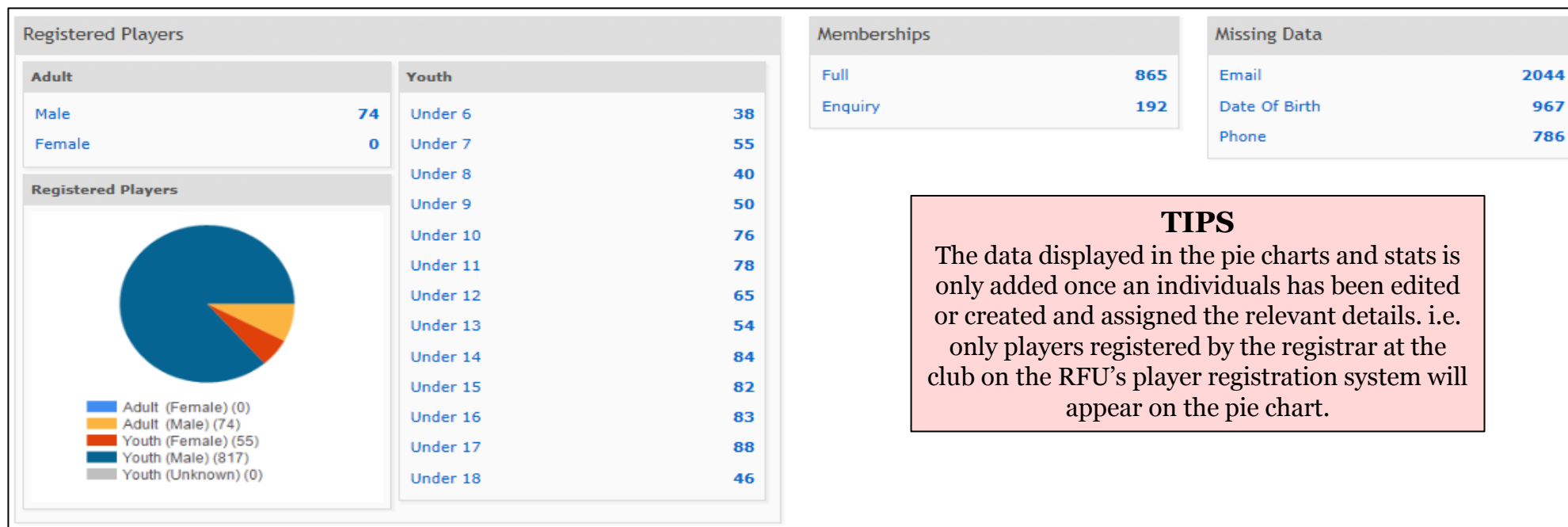
> Members

In the last month

2

Dashboard - Pie Charts

The dashboard will outline key club statistics that previously would only be accessible via running reports or alternatively carrying out an advanced search for the data. However, via the dashboard and in the form of pie charts and stats the club is now able to view a breakdown of key club data. These charts and stats include:



TIPS

The data displayed in the pie charts and stats is only added once an individual has been edited or created and assigned the relevant details. i.e. only players registered by the registrar at the club on the RFU's player registration system will appear on the pie chart.

The pie charts and stats are all hyperlinked. By selecting either the text or a piece of the pie chart, this will drill down and load the specific data requested. i.e. Under 6 Youths, a grid will display all those relevant to the Under 6 group.



PEOPLE

2. NAVIGATION & THE GRIDS

2. Navigation & The Grids

Selecting People will load the dashboard. The administrator can then select from those “People” which groups they would like to display.

There are pre-defined groups already available to the administrator. Selecting any of these will return a group of individuals pre-defined by their status at the club, for example, the pre-defined groups are as follows:

Members – Anyone at the clubs with an Active Membership

Non Members – Those with an affiliation n to the club, but no current membership

Lapsed Members – Those whose membership types have expired

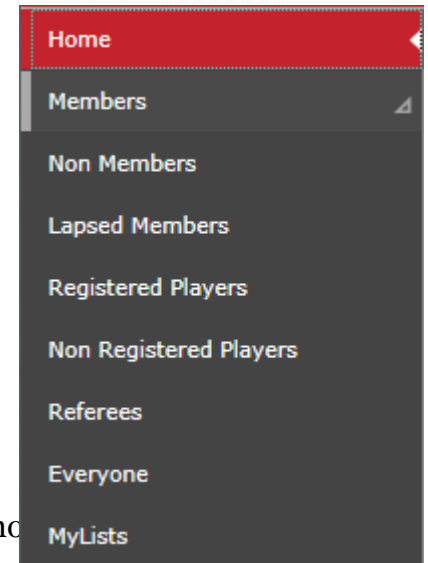
Registered Players – Those individual that have been registered to play at the club

Non Registered Players – Players not eligible to play 1st XV rugby but have been entered onto the system and given the role of “Non Registered Player”

Everyone – All of the above

It is likely that individuals will appear in multiple groups. As an example it is highly likely that an individual will be a player and have a membership type. This would mean that they would appear in the Members, Registered Players and Everyone grids.

Each grid will have a slightly different information displayed. e.g. Members displays membership information, the non members doesn't display this as they are not members.



In terms of functionality, what an administrator can do in each grid is fairly consistent. The various groups have been created to make it simpler to find individuals at the club. However what you can do in each grid, Export, Email, Create Groups etc, remains fairly similar from one grid to the next. Suitable differences such as the removal of Merge from the Registered Players grid, as two players cannot be merged is a prime example of where some functions have had to be removed from the above groups. In the main, they are the same throughout.



PEOPLE

3. MEMBERS GRID

3. People – Members

The members grid contains all individuals that have been assigned a Membership Type at the club and it is Active.

Each member has a line in the grid dedicated to them. The individuals line displays all the pertinent data relating to that member at the club. The data is all accessible by scrolling along the page to view the data.

RugbyFirst Training RFC										
(Filtered)										
✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton
✓	Chris	Ashmore	01/01/1980	1299550	Life Member	Full	05/03/2015	Cash		200 Whitton
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			45a Isla Roa
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton
✓	Jo	Blogg	03/01/1981	1236416	Social	Full	19/10/2111	Cash		200 Whitton
✓	Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			Test TWICK
✓	Max	Burton	09/01/1979	982786	Social	Full	05/03/2015	Cheque	111	24 Grasmer
✓	Max	Burton	01/01/2000	1478316	Social	Full				
✓	Max	Bygrave	01/01/1900	1237648	Life Member	Full				
✓	Greg	Chairman	10/10/1956	1146180	Committee	Full				
✓	Chris	Coach	10/11/1974	1146203	Coach	Full				
✓	Jim	Coach	09/01/1979	1146154	Coach	Full				
✓	Harry	Coaching	20/06/1971	1146202	Coach	Full				
✓	Dan	Coordinator	07/05/1988	1146183	Committee	Full				
✓	Webmaster	Eight	09/01/1970	1146353	Social	Full				
✓	No	Email	09/01/1979	1355922	Social	Full				
✓	Max	Email	09/10/1989	1355925	Social	Full				

RugbyFirst Training RFC							
(Filtered)							
✓	First Name	Last Name	Role	Player	DBS Status	DBS Expiry	Award Qualification Name
✓	Max	ABC			NONE		
✓	Chris	Ashmore	Senior (1st XV)		NONE		
✓	Chris	Ashmore	Manager		Current	11/11/2014	
✓	Jim	Bean	Senior (Other)		NONE		
✓	Jo	Blogg			NONE		
✓	Joe	Bloggs	Registered (Adult (Men))		NONE		
✓	Max	Burton			Current	29/05/2015	1st4Sport Level 1, Safeguarding and Prote
✓	Max	Burton	Registrar (Youth)		NONE		
✓	Max	Bygrave			NONE		
✓	Greg	Chairman			NONE		
✓	Chris	Coach	Mini-Midi (Under 12)		NONE		Youth Level 1, Youth Level 2, 1st4Sport L
✓	Jim	Coach	Senior (1st XV), Mini-Midi (Under 11), Registrar (/ ...		NONE		1st4Sport Level 2
✓	Harry	Coaching			NONE		
✓	Dan	Coordinator	Coaching Co-ordinator		NONE		
✓	Webmaster	Eight	Full Webmaster		NONE		
✓	No	Email			NONE		
✓	Max	Email			NONE		

3. People – Members

There are a variety of functions available via the members list initially the administrator can filter to find groups to members, or they can Create a New Member or Export the details to CSV

RugbyFirst Training RFC (Filtered)

New Member Export

✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters
?											Clear
											Search
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton	
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whitton	
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			45a Isla Roa	
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton	
✓	Jo	Blogg	03/01/1981	1236416	Social	Full					
✓	Joe	Bloggs	20/12/1980	1460108	Adult						
✓	Max	Burton	09/01/1979	982786	Social						
✓	Max	Burton	01/01/2000	1478316	Social						
✓	Max	Bygrave	01/01/1900	1237648	Life						
✓	Greg	Chairman	10/10/1956	1146180	Com						
✓	Chris	Coach	10/11/1974	1146203	Coach						
✓	Jim	Coach	09/01/1979	1146154	Coach						
✓	Harry	Coaching	20/06/1971	1146202	Coach						
✓	Dan	Coordinator	07/05/1988	1146183	Com						

RugbyFirst Training RFC (Filtered)

Selected 4 Export More

✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address
?										
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			
✓	Jo	Blogg	03/01/1981	1236416	Social	Full	19/10/2111	Cash		
✓	Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			
✓	Max	Burton	09/01/1979	982786	Social	Full	05/03/2015	Cheque	111	24 Gasmer
✓	Max	Burton	01/01/2000	1478316	Social	Full	05/03/2015			200 Whitton
✓	Max	Bygrave	01/01/1900	1237648	Life Member	Full	05/03/2015			200 Whitton
✓	Greg	Chairman	10/10/1956	1146180	Committee	Full	05/03/2015			223 Hospital
✓	Chris	Coach	10/11/1974	1146203	Coach	Full	05/03/2015	Cash		Rugby Road
✓	Jim	Coach	09/01/1979	1146154	Coach	Full	05/03/2015			Rugby Road
✓	Harry	Coaching	20/06/1971	1146202	Coach	Full	05/03/2015			Rugby Road
✓	Dan	Coordinator	07/05/1988	1146183	Committee	Full	05/03/2015			Rugby Road

Selected 4 of 103 Page 1 of 5 Rows 25 Page 1

Request Payment
Add To Group
Send eMail
Delete Individual
Update Membership Status
Merge
Apply For DBS

If the administrator selects multiple members then the functionality available opens up to a variety of functions.

3. People - Members

Upon selecting (via the tick box) either one or multiple members, additional functions become available. These options only become available once the member(s) have been selected. Without selecting the options are hidden.

Membership List (Filtered)

✓	RFU ID	First Name	Last Name	Address	Membership Number	Membership Type	Request Payment	Members
✓	1263974	Luke	Andsee	54 Bamboo Street Plumstead SE18 3AA	test1		05/0	
✓	613288	Chris	Ashmore	45a Isla Road London SE18 3AA	Flick		05/0	
✓	1533654	Test	Basic	200 Whitton Road Twickenham tw2 7ba	test1		05/0	
✓	1546467	JackTest	BasicMember	Brecknock Road 99a Tufnell Park London N7 0BX	Adult		05/0	
✓	607775	Susan	Bates	111 Mogden Lane Isleworth MIDDLESEX TW7 7L ...	test1		05/0	
✓	1460108	Joe	Bloggs	Test TWICKENHAM TW2	test1		05/03/2015	Full
✓	1109150	Michael						
✓	714995	Tom						
✓	1152408	Tom						
✓	1582655	Max						

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Tip
These additional options/functions work the same throughout the system. Individuals/Events/Teams all have to be selected before they are available

Membership List (Filtered)

✓	RFU ID	First Name	Last Name	Address	Membership Number	Membership Type	Request Payment	Members
✓	1263974	Luke	Andsee	54 Bamboo Street Plumstead SE18 3AA	test1		05/0	
✓	613288	Chris	Ashmore	45a Isla Road London SE18 3AA	Flick		05/0	
✓	1533654	Test	Basic	200 Whitton Road Twickenham tw2 7ba	test1		05/0	
✓	1546467	JackTest	BasicMember	Brecknock Road 99a Tufnell Park London N7 0BX	Adult		05/0	
✓	607775	Susan	Bates	111 Mogden Lane Isleworth MIDDLESEX TW7 7L ...	test1		05/0	
✓	1460108	Joe	Bloggs	Test TWICKENHAM TW2	test1		05/03/2015	Full
✓	1109150	Michael	Branch	1a Conway Road PLUMSTEAD KENT SE18 1AZ	test1		05/03/2015	Full
✓	714995	Tom	Brewis	Claremont 14-16 Flat 10 St. John's Avenue LONI ...	test1		05/03/2015	Full
✓	1152408	Tom	Brewis	Add1 Cty County Tyrone QA123QA	test1		05/03/2015	Full
✓	1582655	Max	Burton	The Rugby Football Union 200 Twickenham Stadi ...	123456	Adult		Full

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Tip
Rather than scrolling through all the pages to find the right members, use the filter to search for specific groups. i.e. if the user wishes to email all players. Filter the list by players



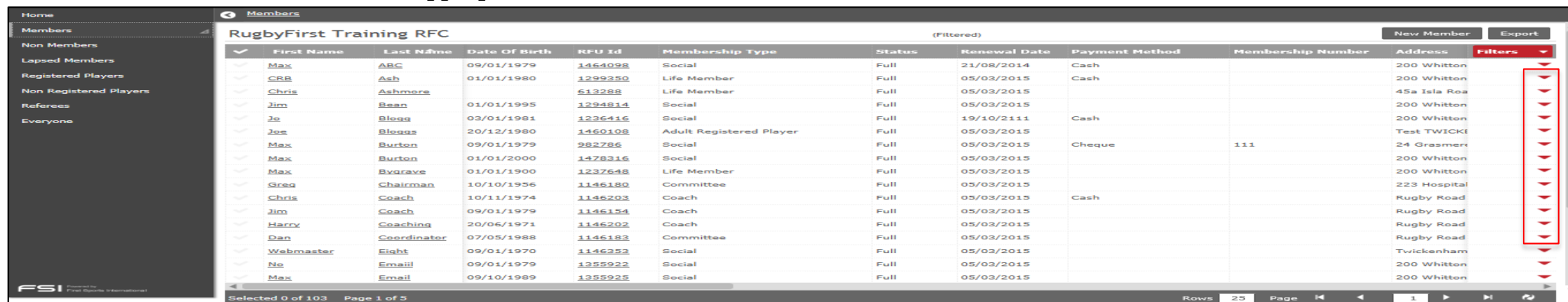
PEOPLE

3.1 EXPAND EDIT

3.1 People – Members - Expand Edit

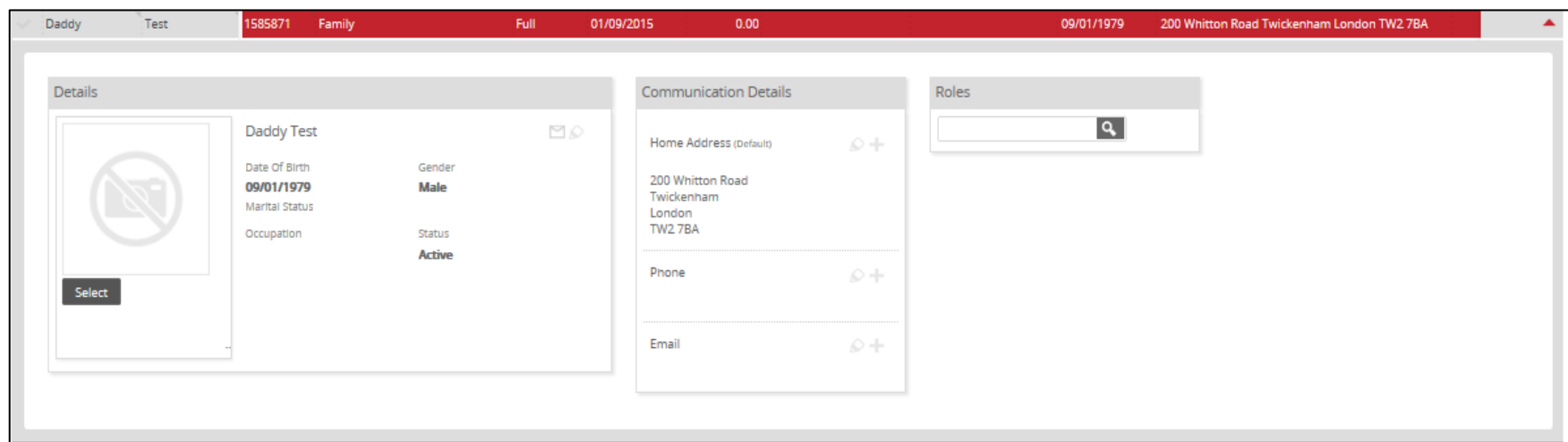
In order for the administrator to make quick changes to their members directly via the membership list, each member has the ability to have their details expanded. Once expanded, pertinent details about the member are displayed and can be edited.

The membership list is a grid that display a host of information about the clubs members, in order to edit a member, the user must select the **Red Arrow** next to the appropriate member



First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters
Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton	
CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whitton	
Chris	Ashmore		613288	Life Member	Full	05/03/2015	Cash		45a Isla Roa	
Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton	
Jo	Bloggs	03/01/1981	1236416	Social	Full	19/10/2111	Cash		200 Whitton	
Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			Test TWICK	
Max	Burton	09/01/1979	282786	Social	Full	05/03/2015	Cheque	111	24 Grasmer	
Max	Burton	01/01/2000	1478316	Social	Full	05/03/2015			200 Whitton	
Max	Bygrave	01/01/1900	1237648	Life Member	Full	05/03/2015			200 Whitton	
Greg	Chairman	10/10/1956	1146180	Committee	Full	05/03/2015			223 Hospital	
Chris	Coach	10/11/1974	1146203	Coach	Full	05/03/2015	Cash		Rugby Road	
Jim	Coach	09/01/1979	1146154	Coach	Full	05/03/2015			Rugby Road	
Harry	Coaching	20/06/1971	1146202	Coach	Full	05/03/2015			Rugby Road	
Dan	Coordinator	07/05/1988	1146183	Committee	Full	05/03/2015			Rugby Road	
Webmaster	Eight	09/01/1970	1146353	Social	Full	05/03/2015			Twickenham	
No	Email	09/01/1979	1355922	Social	Full	05/03/2015			200 Whitton	
Max	Email	09/10/1989	1355925	Social	Full	05/03/2015			200 Whitton	

Selecting the Red Arrow will display the key details for that member. The majority of which can be edited. Other functions are available by selecting the individuals name via the grid. Each name is hyperlinked.



Daddy	Test	1585871	Family	Full	01/09/2015	0.00	09/01/1979	200 Whitton Road Twickenham London TW2 7BA
<div><div><div></div><div><div>Daddy Test</div><div>Date Of Birth 09/01/1979</div><div>Marital Status</div><div>Occupation</div><div>Gender Male</div><div>Status Active</div></div></div><div><div>Communication Details</div><div>Home Address (Default) 200 Whitton Road Twickenham London TW2 7BA</div><div>Phone</div><div>Email</div></div><div><div>Roles</div><div><input type="text"/></div></div></div>								

3.1 People – Members – Expand Edit

The individual highlighted is the member the user is editing

The screenshot shows the 'Expand Edit' interface for a member named 'Daddy Test'. The interface is divided into three main sections: 'Details', 'Communication Details', and 'Roles'. The 'Details' section includes a photo upload area with a 'Select' button, and fields for 'Date Of Birth' (09/01/1979), 'Gender' (Male), 'Marital Status', 'Occupation', and 'Status' (Active). The 'Communication Details' section includes fields for 'Home Address (Default)', 'Phone', and 'Email'. The 'Roles' section includes a search box and a list of roles. Red arrows point from the text annotations below to the corresponding fields in the interface.

Field	Value
Name	Daddy Test
Family	Family
Full Name	Full
Date Of Birth	09/01/1979
Gender	Male
Marital Status	
Occupation	
Status	Active
Home Address (Default)	200 Whitton Road Twickenham London TW2 7BA
Phone	
Email	

Photos can be uploaded for the members

Personal Details, Addresses & Contact details can be updated

Current Roles are listed and can be removed by selecting X
To add a role, the user should simply begin typing in the text box and a search will return close matches. Select Add and Save and the role has been assigned to that individual



PEOPLE 3.2 FULL EDIT

3.2 People – Members – Full Edit

In order to drill down on even more of the individuals details. Each record/name via the grid is hyperlinked.

RugbyFirst Training RFC										(Filtered)	New Member	Export
✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters	
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whittor		
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whittor		

Mr Owen Abbott

Home

Change Password

Communication

Details

Orders

Contacts


Payment History

Relationships

Mr Owen John Abbott

Profile

Details



Mr Owen John Abbott

Date Of Birth
30/08/1991

Gender
Male

Status
Active

Contact

Address

Rugby House
200 Whittor Road
TWICKENHAM
MIDDLESEX
TW2 7BA

Email
141653662@first-sports.com

Status

Status
Active

Created
26/09/2007

Money Outstanding

GBP

0.00

Activity

User
Maxwell

Last login
07/07/2014
10:17

Qualifications

Qualifications

0

Roles

Coach (Active)

Role from 07/07/2014 09:12:21

Registrations

Youth Player (Inactive)

Player from 26/09/2007 to Current

Memberships

Honorary Life (Deleted)

Membership from 10/04/2008 to 01/09/2015

Honorary Life (Pending)

Membership from 12/12/2012 to 01/09/2015

Relationships

Mr John Abbott (Active)

Child relationship from 26/09/2007 to Current

Mr Daniel Abbott (Active)

Child relationship from 28/10/2010 to Current

Mr Kate Abbott (Active)

Child relationship from 29/09/2011 to Current

Once drilled though, a number of pages are dedicated to the persona details of the member

The system will display any relationships from registration i.e. if a youth players parents are entered when the child is registered the relationship is displayed

Personal details, addresses, last activity logs, roles, qualifications, any registered player statuses & memberships are all displayed providing a real overview of the individual

3.2 People – Members – Full Edit

Mr Owen Abbott

Home

Change Password

Communication

Details

Orders

Contacts

Payment History

Relationships

Mr Owen John Abbott

Details

Mr Owen John Abbott

Date Of Birth **30/08/1991**

Gender **Male**

Marital Status

Occupation

Status **Active**

Select

Click to select new image

Communication Details

Home Address (default)

45 Cambridge Road
Colchester
ESSEX
UNITED KINGDOM
CO3 3NR

Home Phone (Default)

44 (0) 1206 767289

HOME Email (Default)

141653662@first-sports.com

Notes

MEMBERNOTE Note

Just for test

Roles

Search

The options above allow the administrator to edit, add or email. Once selected a Save icon becomes available, once updated the changes must be saved

Roles and Current memberships are also listed for the individual. To Remove any existing role, select the X next to the role. To add a role, type in the name and a search will return.

Coach
Coach
Coaching Co-ordinator
Coaching Development
Coaching Development (Chair)
Coaching Development (Member)
Coaching Development (Nominee)
Coaching Development (Secretary)
Coaching Development (Vice/Deputy Chair)
Community Rugby Coach
Development Squad Coach
Referee Coach
Society Referee Coach
Touch Judge Coach

3.2 People – Members – Full Edit

The orders tab displays any paid or outstanding order (memberships) that the individual has

Payment history displays any payments for memberships

The relationship tab displays any relationship either created when a family membership as associated to the member or when a youth player was registered by the registrar

The image shows three overlapping screenshots of the RFU member management system. Each screenshot displays a sidebar menu on the left with options: Home, Change Password, Communication, Details, Orders, Contacts, Payment History, and Relationships. The main content area shows a table of data for a member named 'Daddy Test'.
1. The top screenshot shows the 'Orders' tab selected in the sidebar. The table has columns: Order Refer..., Order Date, Order Total, Balance, and Status. A single row is visible with Order Refer... 90292304, Order Date 06/07/2014, and Status Paid.
2. The middle screenshot shows the 'Payment History' tab selected. The table has columns: Reference, Payment Date, Payment Time, Settlement Date, Amount, Currency, Status, Payment Method, Card Type, and Email. A single row is visible with Payment Date 06/07/2014, Payment Time 17:23, Amount 0.00 GBP, and Status Confirmed.
3. The bottom screenshot shows the 'Relationships' tab selected. The table has columns: URN, First Name, Last Name, Date of Bir..., Status, Type, Valid from, Valid to, and Comments. Two rows are visible: one for a 'Kid' (URN 1585870, Date of Birth 09/01/2006, Status Active, Type Child) and one for a 'Mummy' (URN 1585872, Date of Birth 09/01/1979, Status Active, Type Wife, Comment Added by membership system).

Order Refer...	Order Date	Order Total	Balance	Status
90292304	06/07/2014			Paid

Reference	Payment Date	Payment Time	Settlement Date	Amount	Currency	Status	Payment Method	Card Type	Email
	06/07/2014	17:23		0.00	GBP	Confirmed	Free		

URN	First Name	Last Name	Date of Bir...	Status	Type	Valid from	Valid to	Comments
1585870	Kid	Test	09/01/2006	Active	Child	04/07/2014		
1585872	Mummy	Test	09/01/1979	Active	Wife	06/07/2014		Added by membership system



PEOPLE

3.3 CREATE NEW MEMBER (SINGLE)

3.3 People - Members – Create New Member (Single)

From the members grid Select **New Member**

✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton	▼
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whitton	▼
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			45a Isla Roa	▼
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton	▼
✓	Jo	Blogg	03/01/1981	1236416	Social	Full	19/10/2111	Cash		200 Whitton	▼
✓	Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			Test TWICK	▼
✓	Max	Burton	09/01/1979	982786	Social	Full	05/03/2015	Cheque	111	24 Grasmere	▼
✓	Max	Burton	01/01/2000	1478316	Social	Full	05/03/2015			200 Whitton	▼
✓	Max	Bygrave	01/01/1900	1237648	Life Member	Full	05/03/2015			200 Whitton	▼
✓	Greg	Chairman	10/10/1956	1146180	Committee	Full	05/03/2015			223 Hospital	▼
✓	Chris	Coach	10/11/1974	1146203	Coach	Full	05/03/2015	Cash		Rugby Road	▼
✓	Jim	Coach	09/01/1979	1146154	Coach	Full	05/03/2015			Rugby Road	▼
✓	Harry	Coaching	20/06/1971	1146202	Coach	Full	05/03/2015			Rugby Road	▼
✓	Dan	Coordinator	07/05/1988	1146183	Committee	Full	05/03/2015			Rugby Road	▼
✓	Webmaster	Eight	09/01/1970	1146353	Social	Full	05/03/2015			Twickenham	▼
✓	No	Email	09/01/1979	1355922	Social	Full	05/03/2015			200 Whitton	▼
✓	Max	Email	09/10/1989	1355925	Social	Full	05/03/2015			200 Whitton	▼

Selected 0 of 103 Page 1 of 5 Rows 25 Page 1

TIPS

When assigning a membership type to the individual, there is usually a period that the membership is created for e.g. 12 months. If this date passes then the member will move from current members to the lapsed members grid.

Colchester RFC > New Membership

Select Scheme

Filters

☐ Adult ☐ FAMILY ☐ Junior

Select which membership type the individual is going to hold

Colchester RFC > New Membership

Select Scheme

Filters

☒ Adult ☐ FAMILY ☐ Junior

Member ☒ Golden

£110 Member
Member - Full Group Member

0 Golden
new product

Next

3.3 People - Members – Create New Member (Single)

Complete a search to see if the individual already exists at the club

Add Individuals

Find people by name

Title

Mr

▼

First Name

Dummy

* Surname

Test

Search

☐ **MR Dummy Test (ID:1107933)** E:61154908@first-sports.com DOB:09 January 1979
Rugby House TWICKENHAM MIDDLESEX TW1 1AZ

Members

No individuals currently added to this membership

Any matches at the club will be returned. If there is a match., the search will display this, the administrator can then either choose to Add to the existing or Create a new Member completely (NOTE: If you add a membership to an individual with an existing /active type is will archive the old and assign the new. An individual can only hold one membership type at any one time.)


Next

Create New Individual

Insert the details for the new member & Save

Add Individual

Profile Picture



upload image

Select

Individual

* Title

▼

* First Name

Middle Names

* Last Name

Gender

▼

Date Of Birth

* Status

Active

▼

Contact Details

Phone

Area Code

Extension

Local Number

Email

* Email (0/200)

Address

Type

Home

▼

Country

▼

* Postcode

Number

Building

Address

Save

Cancel

The next page is to confirm the selection

Add Individuals

Member

Member

Member - Full Group Member

Members

Mr James Testing

T: E.maxburton@rfu.com DOB:09 January 1979

Next

3.3 People - Members – Create New Member (Single)

Colchester RFC > New Member

Summary Place Order

Membership Scheme

Membership

Name

Description

Member - Full Group Member

Unit Price

110.000

Members

Mr James Testing

T: Emaxburton@rfu.com DOB: 09/01/1979

A summary page is displayed outlining the membership details, select Place Order

Order Summary Pay

Payment

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

☒ Online Card ☐ Cash ☐ Cheque

Payee

* First Name * Last Name

* Email (17/200)

Billing Address

Country * Postcode

Number Building

* Address

* City County

The system is asking the administrator to outline how the membership has been paid. Once confirmed select **PAY**

Order Success

Details

Your order has been completed successfully.

Payment Reference **#88833622**

Please keep a note of you payment reference.

Payment date **07/07/2014**

Payment time **14:35**

82424043

Member

Member - Full Group Member

Quantity: 1

110.00

Status: **Paid**

Sub Total **110.00 GBP**

The membership has been assigned



3.3 People - Members – Create New Member (Single)

Colchester RFC


New MemberExport

✓	First Name	Last Name	RFU Id	Membership Type	Status	Renewal Date	Balance	Payment Method	Membership Number	Date Of Birth	Address	Phon	Filters
?	Starts With				In								Clear
		Testing			Full, En...								Search
✓	James	Testing	1585902	Member	Full	01/09/2015	0.00			09/01/1979			

Mr James Testing

Profile

Details



Mr James Testing
Date Of Birth
09/01/1979

Gender
Status
Active

Contact

Address
200 Whitton Road
Twickenham
London
TW2 7BA
Email
maxburton@rfu.com

Status

Status
Created
07/07/2014

Money Outstanding

GBP
0.00

Activity

User
Last login
Maxwell
07/07/2014
14:11

Qualifications

Qualifications
0

Roles

Roles
0

Registrations

Registrations
0

Memberships

Member (Full)
Membership from 07/07/2014 to 01/09/2015

MRJames Testing

✓

Order Refer...

Order Date

Order Total

Balance

Status

82424043

07/07/2014

110.00

Paid

Export

Filters

Returning to the Members grid the new member will be displayed, outlining the membership type they hold and if there is any outstanding balance. Drilling down on the member will also display any money owed for memberships and the orders tab will show any paid orders



PEOPLE

3.3 CREATE NEW MEMBER (FAMILY)

3.3 People - Members – Create New Member (Family)

From the Members Grid, Select **New Member**

✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton	▼
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whitton	▼
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			45a Isla Roa	▼
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton	▼
✓	Jo	Blogg	03/01/1981	1236416	Social	Full	19/10/2111	Cash		200 Whitton	▼
✓	Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			Test TWICK	▼
✓	Max	Burton	09/01/1979	982786	Social	Full	05/03/2015	Cheque	111	24 Grasmere	▼
✓	Max	Burton	01/01/2000	1478316	Social	Full	05/03/2015			200 Whitton	▼
✓	Max	Bygrave	01/01/1900	1237648	Life Member	Full	05/03/2015			200 Whitton	▼
✓	Greg	Chairman	10/10/1956	1146180	Committee	Full	05/03/2015			223 Hospital	▼
✓	Chris	Coach	10/11/1974	1146203	Coach	Full	05/03/2015	Cash		Rugby Road	▼
✓	Jim	Coach	09/01/1979	1146154	Coach	Full	05/03/2015			Rugby Road	▼
✓	Harry	Coaching	20/06/1971	1146202	Coach	Full	05/03/2015			Rugby Road	▼
✓	Dan	Coordinator	07/05/1988	1146183	Committee	Full	05/03/2015			Rugby Road	▼
✓	Webmaster	Eight	09/01/1970	1146353	Social	Full	05/03/2015			Twickenham	▼
✓	No	Email	09/01/1979	1355922	Social	Full	05/03/2015			200 Whitton	▼
✓	Max	Email	09/10/1989	1355925	Social	Full	05/03/2015			200 Whitton	▼

Selected 0 of 103 Page 1 of 5 Rows 25 Page 1

Colchester RFC > New Membership

Select Scheme

Filters

☐ Adult ☒ FAMILY ☐ Junior

Select which membership type will apply

Colchester RFC > New Membership

Select Scheme

Filters

☐ Adult ☒ FAMILY ☐ Junior

Family

E0 Family

Family member with one junior

Family Membership

E50 Family Membership

Family Membership

3.3 People - Members – Create New Member (Family)

Complete a search to see if the individual already exists at the club

Add Individuals

Find people by name

Title

Mr

▼

First Name

Dummy

* Surname

Test

Search

☐ **MR Dummy Test (ID:1107933)** E:61154908@first-sports.com DOB:09 January 1979
Rugby House TWICKENHAM MIDDLESEX TW1 1AZ

Members

No individuals currently added to this membership

Any matches at the club will be returned. If there is a match., the search will display this, the administrator can then either choose to Add to the existing or Create a new Member completely (NOTE: If you add a membership to an individual with an existing /active type is will archive the old and assign the new. An individual can only hold one membership type at any one time.)


Next

Create New Individual

Insert the details for the new member & Save

Add Individual

Profile Picture



upload image

Select

Individual

* Title

▼

* First Name

Middle Names

* Last Name

Gender

▼

Date Of Birth

* Status

Active

▼

Contact Details

Phone

Area Code

Extension

Local Number

Email

* Email (0/200)

Address

Type

Home

▼

Country

▼

* Postcode

Number

Building

Address

Save

Cancel

3.3 People - Members – Create New Member (Family)

Once the first individual has been associated to the type, the system returns to the search. This allows the administrator to search again for the next individual that is going to be associated. Either an existing individual or a new individual can be linked. The maximum number a membership can be linked with depends on how the type was set up (Please see membership types guide) This type allows up to 2 Adults and up to 3 Juniors

The screenshot shows a web interface titled 'Add Individuals'. At the top right are two buttons: 'Next' and 'Create New Individual'. On the left, under the heading 'Family Membership', there is a list of membership types: 'Family Membership', 'Family Membership', 'Up to 2 adults.', and 'Up to 3 juniors.'. A red box highlights this list, with an arrow pointing from the text above. In the center, under 'Find people by name', there are three input fields: 'Title' (with a dropdown menu showing 'Mr'), 'First Name' (with the text 'Mum'), and '* Surname' (with the text 'Family'). A 'Search' button is below these fields. A red box highlights the search criteria, with an arrow pointing from the text below. On the right, under the heading 'Members', there is a list of members. The first entry is 'Mr Dad Family' with details 'T: E: maxburton@rfu.com DOB: 01 January 1970'. A red box highlights this entry, with an arrow pointing from the text below. A large red arrow points from the 'Create New Individual' button towards the bottom right of the page.

The first individual has been associated to the membership type,

Insert the search criteria and either Add to existing or create new

NOTE: This loop will continue until all the members have been added

3.3 People - Members – Create New Member (Family)

Once all new members have either been created or assigned to the type. The system will ask:

1. Who is the primary member
2. What is the relationship

Once completed, select **NEXT**

Add Individuals Next

Family Membership
Family Membership
Family Membership
Up to 2 adults.
Up to 3 juniors.

Find people by name
Title: First Name: * Surname:

Members
Mr Dad Family
☒ Primary Member
T: E: maxburton@rfu.com DOB: 01 January 1970
Mr Mum Family
☐ Primary Member
T: E: mom@rfu.com DOB: 10 October 2000
Mr Junior Family
☐ Primary Member
T: E: test@rfu.com DOB: 01 January 2005

* Relationship To Primary

Other
Parent
Child
Sibling
Husband
Wife
Partner

3.3 People - Members – Create New Member (Family)

Confirm the Membership

Colchester RFC > New Member

Summary

Place Order

Membership Scheme

Membership

Name

Family Membership

Description

Family Membership

Members

Mr Dad Family
T: E: maxburton@rfu.com DOB: 01/01/1970

Mr Mum Family
T: E: mom@rfu.com DOB: 10/10/2000

Mr Junior Family
T: E: test@rfu.com DOB: 01/01/2005

Unit Price

50.000

Order Summary

Pay

Payment

Method

Please check the order items below and the final payment amount.

Click the pay button to continue to the payment gateway.

☐ Online Card ☒ Cash ☐ Cheque

Payee

* First Name
Dad

* Last Name
Family

* Email (17/200)
maxburton@rfu.com

Billing Address

Country
TW2 7BA

Number
200

Building
RFDL

* Address
Twickenham Stadium
Whitton Road

* City
TWICKENHAM

County
MIDDLESEX

☒ Order 34491403 | 50.00 GBP

Promotions

Promotional Code

Apply

How the membership is being paid

3.3 People - Members – Create New Member (Family)

Order success, new members have been created.

Order Success

Details

Your order has been completed successfully.

Payment date
07/07/2014

Payment Reference
#57984455

Please keep a note of you payment reference.

Payment time
16:37

34491403

Family Membership

Family Membership

Quantity:1

50.00

Status: **Paid**

Sub Total

50.00 GBP

All three members have been created and now appear on the Members grid. Select the member by clicking on their name

Members

All Members

maxwell

Members | All Members

Colchester RFC

New MemberExport

✓	First Name	Last Name	RFU Id	Membership Type	Status	Renewal Date	Balance	Payment Method	Membership Number	Date Of Birth	Address	Phone	Filters
?	Starts With												Clear
		Family											Search
✓	Dad	Family	1585903	Family Membership	Full	04/07/2015	0.00			01/01/1970			
✓	Junior	Family	1585905	Family Membership	Pending	04/07/2015	0.00			01/01/2005			
✓	Mum	Family	1585904	Family Membership	Pending	04/07/2015	0.00			10/10/2000			


3.3 People - Members – Create New Member (Family)

Drilling down on any of those individuals will display the relationship just created.

Mr Dad Family

Profile

Details



Mr Dad Family
Date Of Birth
01/01/1970

Gender
Active

Contact

Address
200 RFDL
Twickenham Stadium
Whitton Road
TWICKENHAM
MIDDLESEX
TW2 7BA
Email
maxburton@rfu.com

Status

Status
Active

Created
07/07/2014

Money Outstanding

GBP
0.00

Activity

User
Maxwell

Last login
07/07/2014
14:11

Relationships

Mr Mum Family (Active)
Other relationship from 07/07/2014 to Current

Mr Junior Family (Active)
Other relationship from 07/07/2014 to Current

Qualifications

Qualifications
0

Roles

Roles
0

Registrations

Registrations
0

Memberships

Family Membership (Full)
Membership from 07/07/2014 to 04/07/2015



PEOPLE

3.4 GRID FILTERS

3.4 People - Members – The Filter

One of the most useful tools in Club Admin is the ability to filter members into specific groups.

Club and CB membership lists typically hold a lot of data. In order to use the data to the best of its ability, filtering and segmenting the data into smaller chunks of information make it much more usable.

Filtering the data allow the clubs and CB's to see specific information and individuals. This filtered data can then be used to Export, Email and create groups.

3.4 People - Members – Grid Filters

The filter is opened via the membership grid. Once the membership grid has loaded the filter is set to be closed by default. To expand the filter and create a search then the user must select the **Filter** button

RugbyFirst Training RFC (Filtered) New Member Export

✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton	▼
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whitton	▼
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			45a Isla Roa	▼
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton	▼
✓	Jo	Blogg	03/01/1981	1236416	Social	Full	19/10/2111	Cash		200 Whitton	▼
✓	Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			Test TWICKI	▼
✓	Max	Burton	09/01/1979	982786	Social	Full	05/03/2015	Cheque	111	24 Grasmeri	▼
✓	Max	Burton	01/01/2000	1478316	Social	Full	05/03/2015			200 Whitton	▼
✓	Max	Bygrave	01/01/1900	1237648	Life Member	Full	05/03/2015			200 Whitton	▼
✓	Greg	Chairman	10/10/1956	1146180	Committee	Full	05/03/2015			223 Hospital	▼
✓	Chris	Coach	10/11/1974	1146203	Coach	Full	05/03/2015	Cash		Rugby Road	▼
✓	Jim	Coach	09/01/1979	1146154	Coach	Full	05/03/2015			Rugby Road	▼
✓	Harry	Coaching	20/06/1971	1146202	Coach	Full	05/03/2015			Rugby Road	▼
✓	Dan	Coordinator	07/05/1988	1146183	Committee	Full	05/03/2015			Rugby Road	▼
✓	Webmaster	Eight	09/01/1970	1146353	Social						▼
✓	No	Email	09/01/1979	1355922	Social						▼
✓	Max	Email	09/10/1989	1355925	Social						▼

Selected 0 of 103 Page 1 of 5

RugbyFirst Training RFC (Filtered) New Member Export

Filters

Clear

Search

✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton	▼
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whitton	▼
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			45a Isla Roa	▼
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton	▼
✓	Jo	Blogg	03/01/1981	1236416	Social	Full	19/10/2111	Cash		200 Whitton	▼
✓	Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			Test TWICKI	▼
✓	Max	Burton	09/01/1979	982786	Social	Full	05/03/2015	Cheque	111	24 Grasmeri	▼
✓	Max	Burton	01/01/2000	1478316	Social	Full	05/03/2015			200 Whitton	▼
✓	Max	Bygrave	01/01/1900	1237648	Life Member	Full	05/03/2015			200 Whitton	▼
✓	Greg	Chairman	10/10/1956	1146180	Committee	Full	05/03/2015			223 Hospital	▼
✓	Chris	Coach	10/11/1974	1146203	Coach	Full	05/03/2015	Cash		Rugby Road	▼
✓	Jim	Coach	09/01/1979	1146154	Coach	Full	05/03/2015			Rugby Road	▼
✓	Harry	Coaching	20/06/1971	1146202	Coach	Full	05/03/2015			Rugby Road	▼
✓	Dan	Coordinator	07/05/1988	1146183	Committee	Full	05/03/2015			Rugby Road	▼

Selected 0 of 103 Page 1 of 5

Rows 25 Page 1

3.4 People - Members – Grid Filters

Once the filter has expanded, it is possible for the club to completed a search across any of the criteria entered for members at the club. Simply entering the test into the boxes below, followed by search will return the individuals that meet that criteria. i.e. **Role/Registered Player**

Some of the text boxes are in fact drop downs. e.g. Membership type is a drop down as these is fixed and predefined.

It is also possible to filter the membership list by more than one criteria i.e. Role of **Player** and Membership type of **General**

The search completed below is requesting a filter on all of the club members that are holding the type of **Adult**

The image displays three sequential screenshots of the RFU membership filter interface, illustrating the process of applying a filter to the membership list.

First Screenshot: Shows the initial filter options. The 'Membership Type' dropdown is set to 'Full, Enquir'. A red box highlights the 'Filters' button. A red arrow points from the 'Filters' button to the 'Membership Type' dropdown.

Second Screenshot: Shows the 'Complete Search Criteria available' message. A red box highlights the 'Filters' button. A red arrow points from the 'Filters' button to the 'Membership Type' dropdown.

Third Screenshot: Shows the 'Membership Type' dropdown set to 'Adult'. A red box highlights the 'Filters' button. A red arrow points from the 'Filters' button to the 'Membership Type' dropdown.

3.4 People - Members – Grid Filters

Once the search has been completed, the grid (membership list) will display only those that meet the criteria outlined and requested in the filter

The search has return all individuals
at the club with the membership
type of Adult

Membership Type requested - **Adult**

In order to return to the
full membership list, the
filter must be cleared

The screenshot shows the RFU Membership List interface. On the left is a sidebar with navigation links: Membership, Membership List (selected), Pending Membership, Communication History, Membership Types, and Merge Individuals. The main area is titled 'Membership List' and includes a filter bar with letters A-Z and an 'All' button. Below this is a table titled 'Membership List (Filtered)'. The table has columns: RFU ID, First Name, Last Name, Address, Membership Number, and Membership Type. The 'Membership Type' column is currently set to 'Adult', and a dropdown menu is open showing a list of 'Adult' entries. Annotations with red arrows point to the 'All' button, the 'Adult' filter dropdown, and the 'Clear' button in the filter bar.

✓	RFU ID	First Name	Last Name	Address	Membership Number	Membership Type
✓	1546467	JackTest	BasicMember			
✓	1582655	Max	Burton			
✓	493453	Paul	Chorley			
✓	1388555	Alex	Geeves			
✓	1098807	Max	Test			
✓	1107933	Dummy	Test			



PEOPLE 3.5 EXPORT

3.5 People - Members – Export

In order to export via the members grid, the administrator can either select Export, which will export all Members in the grid, completed a filter to search for a specific group of individuals or alternatively select directly via the grid.

RugbyFirst Training RFC

(Filtered)

Selected 4

Export

More

✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters
?											Clear
											Search
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton	
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whitton	
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			45a Isla Roa	
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton	
	Jo	Blogg	03/01/1981	1236416	Social	Full	19/10/2111	Cash		200 Whitton	
	Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			Test TWICK	
	Max	Burton	09/01/1979	982786	Social	Full	05/03/2015	Cheque	111	24 Grasmere	
	Max	Burton	01/01/2000	1478316	Social	Full	05/03/2015			200 Whitton	
	Max	Bygrave	01/01/1900	1237648	Life Member	Full	05/03/2015			200 Whitton	
	Greg	Chairman	10/10/1956	1146180	Committee	Full	05/03/2015			223 Hospital	
	Chris	Coach	10/11/1974	1146203	Coach	Full	05/03/2015	Cash		Rugby Road	
	Jim	Coach	09/01/1979	1146154	Coach	Full	05/03/2015			Rugby Road	
	Harry	Coaching	20/06/1971	1146202	Coach	Full	05/03/2015			Rugby Road	
	Dan	Coordinator	07/05/1988	1146183	Committee	Full	05/03/2015			Rugby Road	

Selected 4 of 103

Page 1 of 5

Rows25

Page

1

3.4 People - Members – Export

A pop up will appear asking what data from the members the administrator would like to export. Tick the boxes that are relevant, followed by **Run Export**

Export MembersList

Export

* Export Type: Excel * Delimiter: Comma

Deselect All Select All Run Export

<input checked="" type="checkbox"/> Address Line 1	<input checked="" type="checkbox"/> Address Line 2	<input checked="" type="checkbox"/> Address Line 3	<input checked="" type="checkbox"/> Award Qualification Name	<input checked="" type="checkbox"/> Building Name
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Club	<input checked="" type="checkbox"/> Country	<input checked="" type="checkbox"/> County	<input checked="" type="checkbox"/> Date Of Birth
<input checked="" type="checkbox"/> DBS Expiry	<input checked="" type="checkbox"/> DBS Status	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Ethnic Origin
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> House Number	<input checked="" type="checkbox"/> Known As	<input checked="" type="checkbox"/> Label	<input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> Membership Application Date	<input checked="" type="checkbox"/> Membership Number	<input checked="" type="checkbox"/> Membership Type	<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Occupation
<input checked="" type="checkbox"/> Payment Method	<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Player	<input checked="" type="checkbox"/> Postal Code	<input checked="" type="checkbox"/> Renewal Date
<input checked="" type="checkbox"/> RFU Id	<input checked="" type="checkbox"/> Role	<input checked="" type="checkbox"/> Status		

The system will prompt either the Save or Open

Do you want to open or save **Individual_MembersList.xls** from **uat.first-sports.com**?

Open Save Cancel

The data has been exported

	A	B	C	D	E	F	G	H	I
1	Club	Name	Known As	Label	Building Name	House Number	Address Line 1	Address Line 2	Date Of Birth
2	RugbyFirst Training RFC	Max				200	Whitton Road		09/01/1979
3	RugbyFirst Training RFC	CRB				200	Whitton Road		01/01/1980
4	RugbyFirst Training RFC	Chris		Mr C Ashmore		45a	Isla Road		
5	RugbyFirst Training RFC	James	Jim			200	Whitton Road		01/01/1995



PEOPLE

3.6 EMAIL

3.5 People – Members – Email

One of the key functions on the club admin system is communication and the ability to email. The membership list (if up to date) provides the club with a distribution list that

Membership List (Filtered)

Selected 3 Export More New

✓	RFU ID	First Name	Last Name	Address	Membership Number	Membership Type	Filters
✓	1263974	Luke	Andsee	54 Bamboo Street Plumstead SE18 3AA	test1		
✓	613288	Chris	Ashmore	45a Isla Road London SE18 3AA	Flick		
✓	1533654	Test	Basic	200 Whitton Road Twickenham tw2 7ba	test1		
	1546467	JackTest	BasicMember	Brecknock Road 99a Tufnell Park London N7 0BX	Adult		
	607775	Susan	Bates	111 Mogden Lane Isleworth MIDDLESEX TW7 7L ...	test1		
	1460108	Joe	Bloggs	Test TWICKENHAM TW2	test1		
	1109150	Michael	Branch	1a Conway Road PLUMSTEAD KENT SE18 1AZ	test1		
	714995	Tom	Brewis	Claremont 14-16 Flat 10 St. John's Avenue LON ...	test1		
	1152408	Tom	Brewis	Add1 Cty County Tyrone QA123QA	test1		
	1582655	Max	Burton	The Rugby Football Union 200 Twickenham Stadi ...	123456	Adult	

Selected 3 of 44 Page 1 of 5

Rows 10 Page 1

Add To Group

Send eMail

Delete Individual

Update Membership Status

Merge

Apply For D'S

Select which member(s) to Email or use the filter to find members using a range of criteria

Once selected, select **More** and **Send eMail**

3.6 People – Members – Email

The email page is very similar to any email tool used today. It displays who the email is going to, coming from and then the details and body of the email can also be entered.

The screenshot shows the 'Email Individual' form with the following fields and controls:

- * Email From:** 157338225@first-sports.com
- Recipients 1:** 14154713@first-sports.com
- Email CC:** (empty)
- Email BCC:** (empty)
- * Email Subject:** (empty)
- Attachments:**
 - * Attach Name:** (empty)
 - Description:** (empty)
- Buttons:** Add Recipients, send e-mail, Select, Upload
- Toolbar:** Format, Font, Size, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Video, Audio, Table, ABC
- Body:** (empty text area)

Annotations with red arrows point to the following elements:

- Add Recipients:** Points to the 'Add Recipients' button.
- Send email:** Points to the 'send e-mail' button.
- It is possible to attach a document to the email:** Points to the 'Select' and 'Upload' buttons.
- Insert the body of the text:** Points to the email body text area.

If recipients are missed off, then it is possible to add them retrospectively



PEOPLE 3.7 GROUPS

3.7 People – Members - Groups

Creating Groups enables the administrators to create regular contacts. By doing this, it will avoid future filtering as the group is saved.

Via the grid either select those to be added to the group or complete a filter.

Membership List (Filtered)

✓	RFU ID	First Name	Last Name	Address	Membership Number	Membership Type	Filters
✓	1263974	Luke	Andsee	54 Bamboo Street Plumstead SE18 3AA	test1		
✓	613288	Chris	Ashmore	45a Isla Road London SE18 3AA	Flick		
✓	1533654	Test	Basic	200 Whitton Road Twickenham tw2 7ba	test1		
	1546467	JackTest	BasicMember	Brecknock Road 99a Tufnell Park London N7 0BX	Adult		
	607775	Susan					
		Joe					
		Michael					
		Tom					
		Tom					
	1582655	Max					

Selected 3 of 44 Page 1 of 5 Rows 10 Page 1

Group Individual

Select a group

OR

Enter a new group name

Add

More

- Add To Group
- Send eMail
- Delete Individual
- Update Membership Status
- Merge
- Apply For DBS

Select which members to Export or use the filter

Select Add to create to Add the members to the Group

Select More & Add To Group

Select either an existing group to add the members to or create a completely new group

My Groups

- CB Test Group
- Flick
- max
- Monday
- Test

To view the group, go to **Membership/My Groups**

3.7 People – Members - Groups

Upon Selecting the Group, the members details will be displayed

If a group is no longer in use it can be deleted or copied

The screenshot displays the 'My Groups' sidebar on the left with 'Test' selected. The main area shows the 'Test' group details, including 'Date Created : 01/04/2014', 'Creator : Maxwell Burton', and 'Number of Records : 3'. Below this is the 'Membership List (Filtered)' table. The table has columns: RFU ID, RFUID, Known As, First Name, Last Name, Address, and Membership N. Three members are listed: Luke Andsee, Chris Ashmore, and Test Basic. The interface includes buttons for 'Copy List', 'Delete List', 'Export', and 'New'. A 'Filters' dropdown is also present. The bottom of the table shows 'Selected 0 of 3' and 'Page 1 of 1'.

✓	RFU ID	RFUID	Known As	First Name	Last Name	Address	Membership N
<input type="checkbox"/>	1263974			Luke	Andsee	54 Bamboo Street Plumstead SE18 3AA	
<input type="checkbox"/>	613288			Chris	Ashmore	45a Isla Road London SE18 3AA	
<input type="checkbox"/>	1533654			Test	Basic	200 Whitton Road Twickenham tw2 7ba	

Details of the Group

Selecting the individuals will display additional options such as email

Current options are the same as the member list



PEOPLE

3.8 REMOVE FROM CLUB

3.8 People – Members – Delete

Deleting Individual, enables the club administrators to completely remove individuals that are no longer associated to the club

Via the members grid either select those to be deleted or complete a filter.

Membership List (Filtered) Selected 3 Export More ▾ New

✓	RFU ID	First Name	Last Name	Address	Membership Number	Membership Type	Filters
✓	1263974	Luke	Andsee	54 Bamboo Street Plumstead SE18 3AA	test1		
✓	613288	Chris	Ashmore	45a Isla Road London SE18 3AA	Flick		
✓	1533654	Test	Basic	200 Whitton Road Twickenham tw2 7ba	test1		
✓	1548467		BasicMember	Brecknock Road 99a Tufnell Park London N7 0BX	Adult		
✓	607775		Bates	111 Mogden Lane Isleworth MIDDLESEX TW7 7L ...	test1		
✓	1460108		Bloggs	Test TWICKENHAM TW2	test1		
✓	1109150		Branch	1a Conway Road PLUMSTEAD KENT SE18 1AZ	test1		
✓	714995						
✓	1152408						
✓	1582655						

Delete

New Status: Deleted

Comments:

Member Message: Mr Test BasicOk to update.

More Menu: Add To Group, Send eMail, Delete Individual, Update Membership Status, Merge, Apply For DBS

Buttons: OK, Cancel

Annotations:

- Select which members to Delete or use the filter
- Select More & Delete
- Confirming which members are to be deleted
- Confirm Delete

TIP

1. Deleting member(s) removes them from the club completely. They cannot be retrieved, their record is only accessible by the RFU.
2. Deleting a member does not remove the status of player. If they are no longer playing for the club, then removing them is two stages. They must be de-registered by the registrar and then if they have left the club completely their membership should be archived or deleted.



PEOPLE

3.9 UPDATE STATUS

3.9 People – Members – Update Status

Updating statuses allow the club to know the status of all individuals at the club.

Via the membership list select those to be updated.

Membership List (Filtered) Selected 3 Export More ▾ New

✓	RFU ID	First Name	Last Name	Address	Membership Number	Membership Type	Filters ▾
✓	1263974	Luke	Andsee	54 Bamboo Street Plumstead SE18 3AA	test1		
✓	613288	Chris	Ashmore	45a Isla Road London SE18 3AA	Flick		
✓	1533654	Test	Basic	200 Whitton Road Twickenham tw2 7ba	test1		
	1546467	JackTest	BasicMember	Brecknock Road 99a Tufnell Park London N7 0BX	Adult		
	607775	Susan	Bates	111 Mogden Lane Isleworth MIDDLESEX TW7 7L ...	test1		
		Joe	Bloggs	Test TWICKENHAM TW2	test1		
		Michael	Breack	1a Cowsey Road PLUMSTEAD KENT SE18 1AZ	test1		
		To					
		To					
	1582655	Ma					

Selected 3 of 44 Page 1

Update Status

New Status ▾

Comments

Member Message

Mr Crb Ash	Ok to update.
Mr Max Abc	Ok to update.

More ▾

- Add To Group
- Send eMail
- Delete Individual
- Update Membership Status**
- Merge
- Apply For DBS

Select More & Update Status

Confirming which status to assign

Confirming which members are to be deleted

Confirm Update

TIP

Lapsed will remove the individual from the Members grid and move them to Lapsed Members

Full

Lapsed



PEOPLE 3.10 MERGE

3.10 People – Members – Merge

Merge is completed when an individual has two records on the system. A duplicate is created for various reasons, but it is determined by someone with the same personal and contact details, but a different RFU ID

Via the membership list select the individuals to merge. (NOTE: Only two records can be merged at once)

The screenshot shows the 'RugbyFirst Training RFC' membership list. A red box highlights the 'More' button in the top right corner. A red arrow points from the 'More' button to a dropdown menu on the right, which contains the following options: 'Add To Group', 'Send eMail', 'Delete Individual', 'Update Membership Status', 'Merge', and 'Apply For DBS'. A red box highlights the 'Merge' option. A red arrow points from the 'Merge' option to a callout box that says 'Select More & Merge'.

The membership list table is as follows:

✓	First Name	Last Name	Date Of Birth	RFU Id	Membership Type	Status	Renewal Date	Payment Method	Membership Number	Address	Filters
✓	Max	ABC	09/01/1979	1464098	Social	Full	21/08/2014	Cash		200 Whitton	
✓	CRB	Ash	01/01/1980	1299350	Life Member	Full	05/03/2015	Cash		200 Whitton	
✓	Chris	Ashmore		613288	Life Member	Full	05/03/2015			45a Isla Roa	
✓	Jim	Bean	01/01/1995	1294814	Social	Full	05/03/2015			200 Whitton	
✓	Jo	Blogg	03/01/1981	1236416	Social	Full	19/10/2111	Cash		200 Whitton	
✓	Joe	Bloggs	20/12/1980	1460108	Adult Registered Player	Full	05/03/2015			Test TWICKI	

A red box highlights the checkboxes for 'Jo' and 'Joe'. A red arrow points from this box to a callout box that says 'Select which members to Merge or use the filter'.

The 'Merge Individuals' dialog box is open, showing the following information:

Item	Mr Joseph Blogg	Joe Bloggs
ID and Name to Keep	<input type="radio"/> 1236416 Mr Joseph Blogg	<input checked="" type="radio"/> 1460108 Joe Bloggs
Date of Birth	<input checked="" type="radio"/> 03 January 1981	<input type="radio"/> 20 December 1980
Address	<input checked="" type="radio"/> 200 Whitton Road Twickenham Middlesex TW2 7BA	<input type="radio"/> Test TWICKENHAM TW2
Home Phone	<input checked="" type="radio"/> 11223 344667788	<input type="radio"/>
Work Phone	<input type="radio"/>	<input checked="" type="radio"/>
Mobile Phone	<input type="radio"/>	<input checked="" type="radio"/>
Work Fax	<input type="radio"/>	<input checked="" type="radio"/>
Home Email	<input type="radio"/>	<input type="radio"/>
Work Email	<input type="radio"/>	<input type="radio"/>

A red box highlights the 'Save' and 'Cancel' buttons. A red arrow points from this box to a callout box that says 'Select which data to keep & Save'.

A red arrow points from the 'More' button in the top right corner of the membership list to the 'Merge' option in the dropdown menu.



PEOPLE

3.11 REQUEST PAYMENT

auto email response



PEOPLE

4. NON MEMBERS GRID

5. People - Non Members Grid

There are multiple grids available to display on the GMS. Each grid will return a group of individuals associated or affiliated with the club in some way.

Non Members displays individuals that have been affiliated to the club, but never assigned a membership type at the club, these include:

1. Newly Registered Players (Youth, Adult Men & Adult Women) Once registered players , filter through from the Player Registration module to the People Module. From here they can then be associated a membership type and managed as a member. If a youth player and the Registrar at the club has entered the parents details, these relationship links can be seen from selecting the individual.
2. Parents – If a registrar has entered parents details when registering the child, the parent will also filter through from the Player Reg module to People. It is then possible to see the link to the child and affiliate the whole family to a Membership type.
3. Course Attendees – When individuals attend and pass an RFU course, upon completion the individual is searched for on the database. If they cannot be found or alternatively if they don't have an existing log in when they applied for the course online they will be created as a new person at the club (upon completion) and entered into the clubs non members grid
4. Bulk Upload – Upon bulk uploading a group of people into the club you cannot associate membership types to the individuals. This means upon uploading the new individuals will firstly appear in the Non Members grid.

All grids have very similar actions you can perform against those that are listed in the grids. To see guides on how to perform these grid actions please see the previous guides relating to the Members Grids.

Non Members has one important , alternative action from other grids and that is the ability to make existing non members, members at the club. This is known as **Buy Membership** .

As per **Creating a New Individual** from the Members Grid guide, assigning a membership this can be completed in two way , either as an individual membership or a family membership where multiple individuals are affiliated to the same membership

4.1 People – Non Members - Buy Membership (Single)

Selecting Non Members will load each individual that has never had a membership or role at the club. To proceed with buying a membership, select the individual and **Buy Membership**

Invincibles RFC												Selected 1	Add To Group	New Member	More ▾
✓	First Name	Last Name	URN	Date Of Birth	Address	Phone	E-mail	Balance	Player	Player Type	DBS	Edit			
?												Buy Membership			
												Export			
												Email			
												Apply For DBS			
												Request Payment			
✓	Test	User - Do Not De	337	22/07/1998	Rugby Road Twickenha ...		support@attenda.net	0.00	No						
✓	Jane	Cliff	112431	23/07/1959	1 Alcumlow Cottage Bri ...	(0) 1260 270624	janecliff@therfu.com	0.00	No		Current				
✓	David	Rose	71802	30/08/1963	351 Old Lalra Road Plyr ...	(0) 7702 626266	d_mrose@sky.com	15.00	No						
✓	Elizabeth	Townsend	31023	09/09/1964	15 Mount Road Cranle ...	(0) 1483 277283	liztownsend@btinternet...	0.00	No						
✓	Christopher	Small	47729	27/03/1957	2 Bamford Grove Didst ...	(0) 7843 942029	Chris.Small@lancashirer...	0.00	No						
✓	Gary	Townsend	39455	26/08/1959	13 Falcon Close Bristol ...	(0) 7 764 960396	garytownsend@rfu.com	0.00	No		Current				
	Martin	Griffiths	512319		6 Beadnell Drive Penke ...	(0) 7785 390360	martin.gerardgriffiths@...	0.00	No						

Invincibles RFC > New Membership

Select Scheme

Filters

☒ Adult ☐ Junior ☐ Family

Adult Membership ✓

£50 Adult Membership

Adult Membership

Testing ✓

£10 Testing

Testing product

Invincibles RFC > New Member

Summary

Membership Scheme

Membership

Name

Testing

Description

Unit Price

10.000

Members

Mr Gary Townsend

T:(0) 7 764 960396 E:garytownsend@rfu.com D.O.B:26/08/1959

The individual will then be asked to select the membership type and confirm

4.1 People – Non Members - Buy Membership (Single)

If there is a cost associated to the membership type, the system will prompt payment information. At this point the administrator can choose to either Pay Now or Pay Later. If the payment is left (due to non payment) the individual will be inserted into pending members displaying that they have an outstanding balance, however if the payment is made they be inserted into Members

Order Summary

Payment

Method

Please check the order items below and the final payment amount.

Click the pay button to continue.

☒ Cash ☐ Cheque

Online payments are not currently configured for this club.

Payee

* First Name * Last Name

* Email (20/200)

Billing Address

Country * Postcode

Number

Building

* Address

☒ Order 95876861 | 10.00 GBP

Order Success

Details

Your order has been completed successfully.

Payment Reference **#69651529**

Please keep a note of you payment reference.

Payment date **30/07/2014**

Payment time **08:05**

95876861		
Testing	Quantity:1	10.00
Testing product		
Status: Paid	Sub Total	10.00 GBP
10.00		

4.2 People – Non Members – Bulk Buying Membership

Select the individuals from the Non Members grid and buy membership, allows the club to bulk buy memberships in one easy step.
Select the members, select buy, confirm the scheme and place order.

Invincibles RFC

Selected 3Add To GroupNew MemberMore

✓	First Name	Last Name	URN	Date Of Birth	Address	Phone	E-mail	Balance	Player	Player Type	DBS	
?												Buy Membership
												Export
												Email
												Merge
												Apply For DBS
												Request Payment
✓	Test	User - Do Not De	337	22/07/1998	Rugby Road Twickenha ...		support@attenda.net	0.00	No			
✓	Peter	Baines	528713	05/07/1942	20a Sandpitt Lane St. All ...	(0) 1727 863397	peter.baines@salaw.com	0.00	No			
✓	Tom	Fitzgerald	530467	11/10/1950	25 The Ridings Whittle- ...	(0) 1257 261154	tom.fitzgerald@lancashl...	0.00	No			
✓	Jo	Bloggs	536415		30 High Path Road Gull ...		linda@objectiveinternet...	0.00	No			
✓	Andy	Mutch	537139	13/12/1978								
✓	Andy	Cook	537144									
✓	John	De Wolf	537149									

Invincibles RFC > New Membership

Select Scheme

Filters

☒ Adult ☐ Junior ☐ Family

Adult Membership ✓Testing ✓test ✓

£50 Adult Member
Adult Membership

Invincibles RFC > New Member

Summary

Place Order

Membership Scheme

Membership

Name

Testing

Description

Unit Price

10,000

Members

Mr Andy Mutch
T:91830 089 890 E:Amutch@rfu.com D.O.B:13/12/1978

Mr Andy Cook
T:12344 908 907

Mr John De Wolf
T:21127 709 233 E:John@deewolf.rfu.com

4.2 People – Non Members – Bulk Buying Membership

For the individuals selected it is then possible to assign payments to those orders. In the case where everyone's membership is being update without payments, simply select Pay Later. If they have paid select Pay.

Pay Later will insert all members into pending with an outstanding balance.

Pay Now will insert everyone into Members with a balance of £0.00

Order Summary

Payment

Method

Please check the order items below and the final payment amount.

Click the pay button to continue.

☒ Cash ☐ Cheque

Online payments are not currently configured for this club.

Payee

* First Name

Maxwell

* Last Name

Burton

* Email (0/200)

Billing Address

Country

* Postcode

KT14 7BU

Number

24

Building

* Address

Grasmere Way

Byfleet

* City

West Byfleet

County

SURREY

☒ Orders

☒ Order 105434 | 10.00 GBP

☒ Order 5339260 | 10.00 GBP

☒ Order 74691942 | 10.00 GBP

4.2 People – Non Members – Bulk Buying Membership

Completion of the order will summarise the payments (if payments were made)

Order Success		
Details		
Your order has been completed successfully.		
Payment Reference	Payment date	
#26448682	30/07/2014	
Please keep a note of you payment reference.	Payment time	
	11:01	
105434		
Testing	Quantity:1	10.00
Testing product		
Status: Paid	Sub Total	10.00 GBP
10.00		
5339260		
Testing	Quantity:1	10.00
Testing product		
Status: Paid	Sub Total	10.00 GBP
20.00		
74691942		
Testing	Quantity:1	10.00
Testing product		
Status: Paid	Sub Total	10.00 GBP
30.00		
	Grand Total	30.00 GBP

4.3 People – Non Members - Buy Membership (Family)

Family Memberships enable the club to associate multiple individuals to a membership scheme select the individuals the scheme applies to & Buy Membership. Select the Family Membership type & Next

Invincibles RFC											Selected 3	Add To Group	New Member	More ▾
✓	First Name	Last Name	URN	Date Of Birth	Address	Phone	E-mail	Balance	Player	Player Type	DBS			
?														Buy Membership
														Export
														Email
														Merge
														Apply For DBS
														Request Payment
✓	Test	User - Do Not De	337	22/07/1998	Rugby Road Twickenha ...		support@attenda.net	0.00	No					
✓	Jane	Cliff	112431	23/07/1959	1 Alcumlow Cottage Bri ...	(0) 1260 270624	janecliff@therfu.com	0.00	No		Current			
✓	David	Rose	71802	30/08/1963	351 Old Lalra Road Plyr ...	(0) 7702 626266	d_mrose@sky.com	15.00	No					
✓	Elizabeth	Townsend	31023	09/09/1964	15 Mount Road Cranle ...	(0) 1483 277283	liztownsend@btinternet...	0.00	No					
✓	Christopher	Small	47729	27/03/1957	2 Bamford Grove Didst ...	(0) 7843 942029	Chris.Small@lancashlrer...	0.00	No					
	Martin	Griffiths	512319		6 Beadnell Drive Penke ...	(0) 7785 390360	martin.gerardgriffiths@	0.00	No					
✓	John Nicholas	Vale	512862	17/05/1951	Hartland House Postbri ...	(0) 1822 880434	jnv1@btinternet.com	0.00	No					
	Frazer	Snowdon	516741		100 PO Box Sheffield St ...	(0) 114 2325555	newsdesk@snowdons.c...	0.00	No					
	Peter	Balnes	528713	05/07/1942	20a Sandpit Lane St. Ali ...	(0) 1727 863397	peter.balnes@salaw.com	0.00	No					

Invincibles RFC > New Membership

Select Scheme

Next

Filters

☐ Adult ☐ Junior ☒ Family

Family Test ✓

£10 Family Test
Family Test product

4.3 People – Non Members – Buy Membership (Family)

The following page enables the administrator to outline the which of the family members is the primary holder of the Membership and then what is the relationship of the others to the primary

Add Individuals

Family Test

Family Test
Family Test product
Up to 2 adults.
Up to 2 Juniors.

If all the individuals that will apply to the family membership types aren't included it is possible to search for the additional

Find people by name

Title

First Name

* Surname

Search

Members

Mrs Elizabeth Townsend

☒ Primary Member

* Relationship To Primary
Other

T:(0) 1483 277283 E:liztownsend@btinternet.com DOB:09 September 1964

Mr Christopher Small

☐ Primary Member

* Relationship To Primary
Other

T:(0) 7843 942029 E:Chris.Small@lancashirerugby.com DOB:27 March 1957

Mr Martin Griffiths

☐ Primary Member

* Relationship To Primary
Other

T:(0) 7785 390360 E:martin.gerardgriffiths@ntlworld.com

Other

Parent

Child

Sibling

Husband

Wife

Partner

The members displayed lists all those that will apply to the type. The administrator can then choose which is the primary and what is the relationship of the others to the primary.

4.3 People – Non Members – Buy Membership (Family)

Place the order and you can choose to either pay now or pay later. Paying later will insert the members into Pending with an outstanding balance, payment will insert them into member.

Invincibles RFC > New Member

Place Order

Summary

Membership Scheme

Membership

Name

Family Test

Description

Unit Price

10.000

Members

Mrs Elizabeth Townsend
T:(0) 1483 277283 E:liztownsend@btinternet.com D.O.B:09/09/1964

Mr Christopher Small
T:(0) 7843 942029 E:Chris.Small@lancashirerugby.com D.O.B:27/03/1967

Mr Martin Griffiths
T:(0) 7785 390360 E:martin.gerardgriffiths@ntlworld.com

Order Summary

Payment

Method

Please check the order items below and the final payment amount.
Click the pay button to continue.
☒ Cash ☐ Cheque
Online payments are not currently configured for this club.

Payee

* First Name
Elizabeth
* Last Name
Townsend
* Email (26/200)
liztownsend@btinternet.com

Billing Address

Country
UNITED KINGDOM
* Postcode
GU6 7LT
Number
15
Building
* Address
Mount Road
* City
Cranleigh
County
SURREY

Order 37461458 | 10.00 GBP

Order Success

Details

Your order has been completed successfully.

Payment date
30/07/2014
Payment Reference
#65710729
Please keep a note of your payment reference.

Payment time
09:45

37461458

Family Test

Family Test product

Quantity:1

10.00

Status: Paid

Sub Total

10.00 GBP

10.00



PEOPLE

5. LAPSED MEMBERS GRID

5. People - Lapsed Members Grid

The lapsed members grid displays individuals who previously had a membership at the club, but this has subsequently expired .

When creating a scheme, the scheme is given a duration i.e 12 months. When an individual is assigned that type it will expire in 12 months. What this means is that the individual will then be removed as an active member, appearing in the members grid and placed in the lapsed members grid, until such time that a new membership scheme is assigned to them.

To see how to buy membership from Lapsed Members – **Please see Non Members**

All the grid actions or functions are still available within the lapsed members grid including:



PEOPLE

6. PENDING MEMBERS GRID

5. People - Lapsed Members Grid

The Pending Members grid is not the same as it was on the previous system . Pending Members displays those individuals that have a membership at the club, but with an outstanding balance.

Until such time that the balance is paid and entered on the system, the individual will remain in Pending.

To process the payment, select the Balance

Invincibles RFC												New Member	Export
✓	Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Balance	Payment Method	Membership Number	Date Of Birth	Address	Filters	
✓	test	Jane	Cliff	112431	Pending	30/07/2015	10.00			23/07/1959	1 Alcumlow Cottage Brook Lane Astbury Congleton		
✓	test1	Cornish	Dad	1742261	Pending	29/06/2016	15.00				Rugby House Twickenham Stadium 200 Whitton R		
✓	test1	David	Rose	71802	Pending	29/06/2016	15.00			30/08/1963	351 Old Laira Road Plymouth DEVON PL3 6DH UN		
✓	test	Frazer	Snowdon	516741	Pending	30/07/2015	10.00				100 PO Box Sheffield SOUTH YORKSHIRE S6 6YB U		
✓	test	John Nicholas	Vale	512862	Pending	30/07/2015	10.00			17/05/1951	Hartland House Postbridge DEVON PL20 6SZ ENGI		

Make the payment and this will remove the individual from Pending and insert them into members without an outstanding balance

Order Summary

Pay

Payment

Method

Please check the order items below and the final payment amount.
Click the pay button to continue.
☒ Cash ☐ Cheque
Online payments are not currently configured for this club.

Payee

* First Name
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* Last Name
Cliff

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Number


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☒ Order 14043466 | 10.00 GBP

The logo for the Rugby Football Union (RFU) features a red rose on the left and the letters "RFU" in a bold, black, sans-serif font on the right.



PEOPLE 7. EVERYONE GRID

7. People - Everyone Grid

The everyone grid brings together all the grids listed on the people module.

Within Everyone the following grids are displayed

- Members
- Non Members
- Pending Members
- Lapsed Members
- Registered Players
- Non Registered Players

The club has the ability to view everyone in the grid, with a host of data available to them.

Functionality available is the same and consistent across all grids, you can:

- Email
- Export
- Buy Membership
- Create New Member
- Merge
- Remove
- Request Payment
- Apply for DBS
- Create Groups

There is one notable addition and this is the ability to Bulk Upload



PEOPLE

7.1 BULK UPLOAD

7.1 People – Everyone - Bulk Upload

The bulk upload tool is a facility that enables clubs and CB's to upload a group of individual at he club on mass. Via a template spreadsheet., the club can choose to download and populate the document with the individuals it wants to upload. (Please be aware that there are not currently restrictions on total numbers, but the greater the number, the longer it will take to upload. As an example 1000 individuals could take up to 10 minutes to upload.

The spreadsheet that is populated and uploaded is a standard template. It is only ever possible to upload the data listed in that spreadsheet, if additional columns or data is included, this will be discarded and the upload will fail.

Currently the data that can be uploaded is as follows:

- Title
- First Name
- Other Name
- Last Name
- Gender
- Date of Birth
- Number
- Building
- Address 1
- Address 2
- Address 3
- City
- County
- Country
- Post Code
- Tel Home/Work/Fax/Preferred
- Email Home/Work/Preferred

Please bear in mind the individuals being uploaded will not hold any status at the club at that point of being uploaded, the will not have a membership, a role or be a registered player. If they are in fact one of the above, then these statuses will need to be associated to them post upload. i.e. once uploaded the individual can then be registered as a player.

7.1 People – Everyone - Bulk Upload

Once the template has been downloaded, start to populate the columns and rows with individuals data. Once populated, Save the document to the computers desktop

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
1	title	firstnam	othername	lastnam	gender	dob	number	building	address1	address	address	city	county	country	postalcode	telhome	telmobi	telwork	telfax	telprefer	emailho	emailwc	emailpreferred	
2	Mr	Bulk		Test	Male	09/01/1979	200		Whitton Road			Twickenham	Middlesex	UK	TW2 7BA									

Upload the document to the Bulk Upload tool. Select Browse, find the document on the computer and upload

Upon selecting upload, the document will appear in the **Files to Import** display
Select **Import**

7.1 People – Everyone - Bulk Upload

Via the **Everyone** grid, select **Bulk Upload**

The screenshot shows the RFU 'Everyone' grid with a list of members. The 'Bulk Upload' button is highlighted in the top right corner. Below the grid, the 'Bulk Upload' screen is displayed, showing the 'Create Lists' section with a 'Download' button for the bulk update spreadsheet template. The 'Upload list files' section is also visible, showing a text input for 'Attach Name' and 'Browse' and 'Upload' buttons.

Rugby Football Union

New Member Export Bulk Upload

✓	First Name	Last Name	URN	Date Of Birth	Address	Phone	E-mail	Balance	Member	Player	Filters
✓	Christopher	White	97330	16/07/1963	21 Oakland Avenue Che ...	(0) 7979 852437	12358533@first-sports.c...	0.00	No	No	▼
✓	George	Burkinshaw	94583	07/10/1991	Home Farm DONCASTE ...	(0) 1977 652785	4682287@first-sports.c...	0.00	No	No	▼
✓	William	Bigley	463408	31/10/1991	41 Debdale Road WELU ...	44 (0) 1933 442062	27957548@first-sports.c...	0.00	No	No	▼
✓	Testing testing	test	739		wwwwwwwwwwwwwww ...	02072475700	3693145@first-sports.c...	0.00	No	No	▼
✓	Michael	Morris	92064	07/02/1973	33 Hampden Road Higt ...	07711 310252	MikeMorris@RFU.com	0.00	No	No	▼
✓	Richard	Prescott	104932	15/03/1962	33 Wosley Road Hampt ...	(0) 7711 259179	3383904@first-sports.c...	0.00	No	No	▼

Bulk Upload

Upload your lists Import

Create Lists

Download the bulk update spreadsheet template

Download

Instructions

- Enter the information into the cells on the spreadsheet
- Please make sure the the template headings are not altered in anyway.
- The fields First Name, Last Name, DOB (DD/MM/YYYY), Gender (Male/Female - In Full) and Country (In Full) are mandatory.
- The process will not work if mandatory cells are left blank or completed incorrectly.

Upload list files

Please upload the CSV list files below

* Attach Name

Browse Upload

Files to Import

The Bulk Upload screen will appear, from here the standard template can be downloaded and populated. Select **Download**

6.1 People – Everyone - Bulk Upload

A list will appear informing the user of how many of the individuals have been uploaded. NOTE: If there are any duplicate records the system will not upload and they fall under the failed rows column. To see why they have failed, select Error Records. If complete, select Finished.

Bulk Upload

Processing Lists

Finished

Upload more

Imported lists will appear once processed

Name	Successful Rows	Failed Rows	Error File
Bulk Test.csv	0	10	<div>Error Records</div>

All files have been processed

The original Everyone grid will load, from here it is possible to filter to see if the individual was entered.

✓	Bulk	Upload	1585881				maxurton@rfu.com	0.00	No	No	▼
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It is important to bear in mind, upon Bulk Uploading those individuals, they are not currently members, therefore they are only viewable via the Everyone and Non Members grids.



THANK YOU

