



**GAME MANAGEMENT SYSTEM
(GMS)**

FINANCE GUIDE

TEAMWORK RESPECT ENJOYMENT DISCIPLINE SPORTSMANSHIP

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FINANCE

1. THE DASHBOARD

2. Finance – The Dashboard

The finance dashboard summarises the income of the club from membership payments. All the data listed is dynamic and will allow the administrator to select the data and drill down on specific information that it relates to.





FINANCE

2. MEMBERSHIP SCHEMES

4. Finance – Membership Schemes

The schemes are all listed and can be edited and updated as and when they change.

Invincibles RFC Membership Home						Selected 1	Export	Edit	Add
✓ Name	Price	Unit	Duration	Unit	Default	Filters			
✓ Family Test	10	Years	1		No				
✓ Testing	10	Years	1		No				
✓ Adult Membership	50	Years	1		No				
✓ Registered Youth player		Years	1		No				
✓ Flick		Years	1		No				
✓ Test		Years	1		No				
✓ Coach	5	Years	1		No				
✓ Committee	25	Years	1		No				
✓ Life	50	Years	1		No				
✓ General Member	10	Years	1		No				
✓ Under 12	5	Years	1		No				
✓ Under 13	5	Years	1		No				
✓ Under 14	5	Years	1		No				
✓ Under 15	5	Years	1		No				
✓ Under 16	5	Years	1		No				
✓ Under 17	5	Years	1		No				
✓ Under 18	5	Years	1		No				

4.1 Creating Membership Schemes

There are numerous membership schemes that the club can create , these include

- Adult – Single Membership (age specific)
- Junior - (Single Membership (age specific)
- Individual – (Single Membership (non age specific)
- Family - (Club can specify how many adults and how may children apply to the type)
- Group - (Club can specify maximum number of individuals that can apply to the type)

The club can also determine whether the membership lasts for

- Month
- Years
- Lifetime - No Expiry

Upon selecting a duration, the choice is wider than before, the club can select whether the membership renews on

Join Date – The date you are assigned the membership

Anniversary - A date must be entered to set the renewal date,. Regardless of when the members is set the scheme, it will need to be renewed based on this date i.e. if a membership lasts September to September and the member joins and is assigned the scheme in January, it will only last for 8 months.

The club can also set when an automated renewal is sent to all individuals informing them that the ir membership needs renewing.

4.2 Membership Schemes – Family

To create a membership type, enter a name, & select the type. If Family is selected then it will prompt the club to enter the maximum number of adults & maximum number of children that can be affiliated to the membership. If individual is selected the options are less

When creating a Membership, it is necessary to state how long it lasts. The duration can be determined by the join date or anniversary. Join date = from the date they sign up. Anniversary is where the membership runs from one period in time to the next

The image displays two screenshots of the 'Invincibles RFC > Add Scheme' form. The top screenshot shows the 'Scheme Details' section with 'Scheme Type' set to 'Individual'. The bottom screenshot shows the 'Scheme Details' section with 'Scheme Type' set to 'Family', which has prompted the form to include 'Max Adults' and 'Max Junior' fields. Both screenshots show the 'Scheme Duration And Renewal' section with 'Duration' set to '1 Year' and 'Scheme Renewal' set to 'Anniversary'. Red arrows point from the explanatory text to the relevant fields in the screenshots.

Invincibles RFC > Add Scheme

Scheme Details

* Scheme Name (0/255) * Scheme Type
[] Individual

Scheme Duration And Renewal

* Duration: Years * Unit: 1 (1 YEAR)
* Scheme Renewal: Anniversary Month: January Day: 1
* Renewal Notification Period: 1 Month

Invincibles RFC > Add Scheme

Scheme Details

* Scheme Name (0/255) * Scheme Type: Family Max Adults: 0 Max Junior: 0
* Membership Price: 0 * Scheme Code: [] * Status: Active

Scheme Duration And Renewal

* Duration: Years * Unit: 1 (1 YEAR)
* Scheme Renewal: Join Date
* Renewal Notification Period: 1 Month



FINANCE

3. PAYMENTS

The payments tab outlines the total payments that have been taken by the club for its memberships. All of the payments have been taken, none are outstanding

Invincibles RFC											Selected 1	Export	Refund
✓	Reference	Payment Date	Payment Time	Settlement Date	Amount	Net Amount	Currency	Status	Payment Method	Card Type	Purchase	Filters	
✓	53139328	28/07/2014	17:52		10.00	0.00	GBP	Paid	Cash		Oliver		
✓	5120532	28/07/2014	14:30		10.00	0.00	GBP	Paid	Cash		Ricardo		
✓	65056062	28/07/2014	14:28		10.00	0.00	GBP	Paid	Cash		Timothy		
✓	29757121	28/07/2014	14:27		10.00	0.00	GBP	Paid	Cash		Michael		
✓	11515827	28/07/2014	12:51		20.00	0.00	GBP	Paid	Cash		Nicholas		

Selecting the individual will enable a refund to be made. (not monetary) a note will be made to state that their membership fee was refunded.



FINANCE 4. ORDERS

Orders outlines the total amount of orders or schemes that have been affiliated to club members, both those that have been paid or still have an outstanding balance

Invincibles RFC								Export
Order Refer...	Order Date	Order Total	Balance	Status	Purchaser First Name	Purchaser Last Name	Filters	
✓ 14966409	29/07/2014	15.00	15.00	Pending	Cornish	Dad		
✓ 98427289	29/07/2014	15.00	15.00	Pending	David	Rose		
✓ 78580077	29/07/2014	50.00	50.00	Pending	Paul	Vaughan		
✓ 2854998	28/07/2014	10.00		Paid	Oliver	Crosby		
✓ 54843031	28/07/2014	10.00		Paid	Ricardo	Bruin		
✓ 69075497	28/07/2014	10.00		Paid	Timothy	Bembridge		
✓ 44904595	28/07/2014	10.00		Paid	Michael	Cowle		
✓ 99944689	28/07/2014	20.00		Paid	Nicholas	Eastwood		

Selecting individuals that owe money provides additional options

The club administrator can choose to send a payment request email or state that the scheme has been paid for

Invincibles RFC								Selected 3	Request Payment	Export	Pay
Order Refer...	Order Date	Order Total	Balance	Status	Purchaser First Name	Purchaser Last Name	Filters				
✓ 14966409	29/07/2014	15.00	15.00	Pending	Cornish	Dad					
✓ 98427289	29/07/2014	15.00	15.00	Pending	David	Rose					
✓ 78580077	29/07/2014	50.00	50.00	Pending	Paul	Vaughan					
✓ 2854998	28/07/2014	10.00		Paid	Oliver	Crosby					
✓ 54843031	28/07/2014	10.00		Paid	Ricardo	Bruin					
✓ 69075497	28/07/2014	10.00		Paid	Timothy	Bembridge					
✓ 44904595	28/07/2014	10.00		Paid	Michael	Cowle					
✓ 99944689	28/07/2014	20.00		Paid	Nicholas	Eastwood					



FINANCE

5. BANK DETAILS

8. Bank Details

Invincibles RFC

Detail + Account Details +

No bank details found.
Please add your bank details using the add button

Accept Online
 Account Configured

To add bank details select the +

The facility enables clubs to enter the bank details for the club, this will help with payments etc from the RFU

Add the bank details for the club

Invincibles RFC

Detail ✖ Account Details 🔍

Bank Details

* Bank Name (0/255)
|

Bank Address 1 (0/255)
|

Bank Address 2 (0/255)
|

Bank Address 3 (0/255)
|

Bank Post Code
|

Account Details

Account Name (0/255)
|

Account No
|

Bank Sort Code
|

Is Default

Accept Online
 Account Configured



THANK YOU

