



**RFU**

**GAME MANAGEMENT SYSTEM  
(GMS)**

**PEOPLE GUIDE**

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TEAMWORK RESPECT ENJOYMENT DISCIPLINE SPORTSMANSHIP

## **1. Home – The Dashboard**

## **2. Navigation & The Grids**

## **3. Members Grid**

3.1 Expand Edit

3.2 Full Edit

3.3 Create New Member (Single & Family)

3.4 Grid Filters

3.5 Export

3.6 Email

3.7 Groups

3.8 Remove from Club

3.9 Update Status

3.10 Merge

## **4. Non Members Grid**

4.1 Buy Membership (Single)

4.3 Buy Membership Bulk

4.3 Buy Membership (Family)

4.3 Request Payment

## **5. Lapsed Members Grid**

5.1 Buy Membership (Single)

5.2 Buy Membership (Family)

5.3 Request Payment

## **6. Pending Members Grid**

6.1 Request Payment

## **7. Everyone Grid**

7.1 Bulk Upload

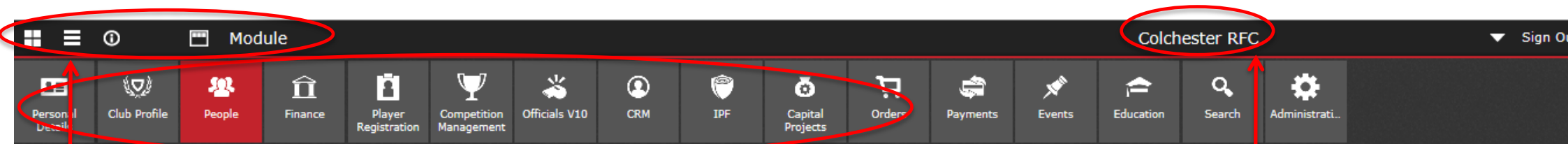


# PEOPLE

## 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](#)

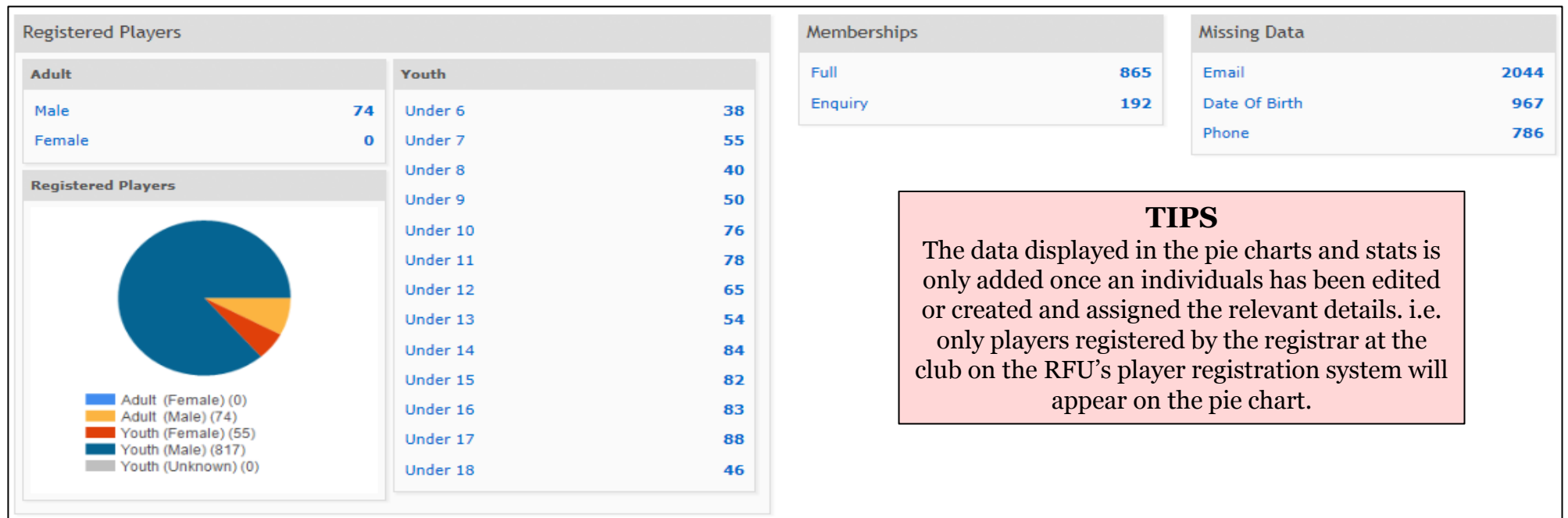
**Address**  
University Playing Fields  
University of Bristol  
Coombe Lane  
Stoke Bishop  
Colchester  
BS9 2BJ  
**Email**  
[5732620@first-sports.com](mailto:5732620@first-sports.com)

### Status

|   |           |
|---|-----------|
| DBS Expiries<br>due within 3 months     | <b>68</b> |
| New<br>Individuals<br>In the last month | <b>0</b>  |
| Lapsed<br>Members<br>In the last month  | <b>2</b>  |

## 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:



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 to the club, but no current membership

Pending Members – Individuals assigned a membership but have not yet paid.

Lapsed Members – Those whose membership types have expired

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

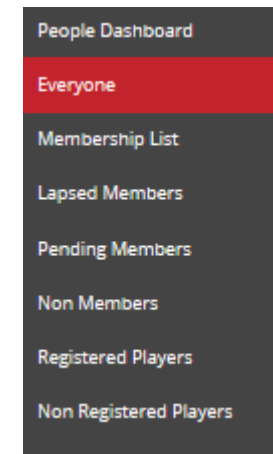
Non Registered Players – Players not eligible to play 1<sup>st</sup> XV rugby but have been entered onto the system and given the role of “Non Registered Player”

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 grid 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) 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  | ▼       |
| ✓ | 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         | 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   |              |                |                   |              | ▼       |
| ✓ | 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   |              |                |                   |              | ▼       |

Selected 0 of 103 Page 1 of 5

RugbyFirst Training RFC (Filtered) New Member Export

| ✓ | First Name | Last Name   | Role   | Player | DBS Status | DBS Expiry | Award Qualification Name                  | Filters |
|---|------------|-------------|--|--------|------------|------------|---|---------|
| ✓ | Max        | ABC         |  |        | 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       |            |   | ▼       |

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



### 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 |
|---|------------|-------------|---------------|---------|-----------------|--------|--------------|----------------|-------------------|--------------|---------|
| ✓ | 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         | Bloqq       | 03/01/1981    | 1236416 | Soci            |        |              |                |                   |              | ▼       |
| ✓ | Joe        | Bloqq       | 20/12/1980    | 1460108 | Adul            |        |              |                |                   |              | ▼       |
| ✓ | Max        | Burton      | 09/01/1979    | 982786  | Soci            |        |              |                |                   |              | ▼       |
| ✓ | Max        | Burton      | 01/01/2000    | 1478316 | Soci            |        |              |                |                   |              | ▼       |
| ✓ | Max        | Bygrave     | 01/01/1900    | 1237648 | Life            |        |              |                |                   |              | ▼       |
| ✓ | Greg       | Chairman    | 10/10/1956    | 1146180 | Com             |        |              |                |                   |              | ▼       |
| ✓ | Chris      | Coach       | 10/11/1974    | 1146203 | Coa             |        |              |                |                   |              | ▼       |
| ✓ | Jim        | Coach       | 09/01/1979    | 1146154 | Coa             |        |              |                |                   |              | ▼       |
| ✓ | Harry      | Coaching    | 20/06/1971    | 1146202 | Coa             |        |              |                |                   |              | ▼       |
| ✓ | 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      | More |
|---|------------|-------------|---------------|---------|-------------------------|--------|--------------|----------------|-------------------|--------------|------|
| ✓ | 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  | ▼    |
| ✓ | Joe        | Bloqq       | 03/01/1981    | 1236416 | Social                  | Full   | 19/10/2111   | Cash           |                   | 200 Whitton  | ▼    |
| ✓ | Joe        | Bloqq       | 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 Gasmerr   | ▼    |
| ✓ | 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)          | Selected 1 | Export   | Add To Group | More   | New   |            |                          |    |
|-------------------------------------|------------|----------|--------------|--|-------|------------|--------------------------|----|
| <input checked="" type="checkbox"/> | 1263974    | Luke     | Andsee       | 54 Bamboo Street Plumstead SE18 3AA            | test1 | 05/0/      | Request Payment          | rs |
| <input type="checkbox"/>            | 613288     | Chris    | Ashmore      | 45a Isla Road London SE18 3AA                  | Flick | 05/0/      | Add To Group             |    |
| <input type="checkbox"/>            | 1533654    | Test     | Basic        | 200 Whitton Road Twickenham tw2 7ba            | test1 | 05/0/      | Send eMail               |    |
| <input type="checkbox"/>            | 1546467    | JackTest | BasicMember  | Brecknock Road 99a Tufnell Park London N7 0BX  | Adult | 05/0/      | Delete Individual        |    |
| <input type="checkbox"/>            | 607775     | Susan    | Bates        | 111 Mogden Lane Isleworth MIDDLESEX TW7 7L ... | test1 | 05/0/      | Update Membership Status |    |
| <input type="checkbox"/>            | 1460108    | Joe      | Bloggs       | Test TWICKENHAM TW2                            | test1 | 05/03/2015 | Merge                    |    |
| <input type="checkbox"/>            | 1109150    | Michael  |              |  |       |            | Apply For DBS            |    |
| <input type="checkbox"/>            | 714995     | Tom      |              |  |       |            |                          |    |
| <input type="checkbox"/>            | 1152408    | Tom      |              |  |       |            |                          |    |
| <input type="checkbox"/>            | 1582655    | Max      |              |  |       |            |                          |    |

Selected 1 of 44 Page 1 of 5

**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)          | Selected 4 | Export   | More        | New  |        |            |                          |    |
|-------------------------------------|------------|----------|-------------|--|--------|------------|--------------------------|----|
| <input checked="" type="checkbox"/> | 1263974    | Luke     | Andsee      | 54 Bamboo Street Plumstead SE18 3AA                | test1  | 05/0/      | Request Payment          | rs |
| <input checked="" type="checkbox"/> | 613288     | Chris    | Ashmore     | 45a Isla Road London SE18 3AA                      | Flick  | 05/0/      | Add To Group             |    |
| <input checked="" type="checkbox"/> | 1533654    | Test     | Basic       | 200 Whitton Road Twickenham tw2 7ba                | test1  | 05/0/      | Send eMail               |    |
| <input checked="" type="checkbox"/> | 1546467    | JackTest | BasicMember | Brecknock Road 99a Tufnell Park London N7 0BX      | Adult  | 05/0/      | Delete Individual        |    |
| <input type="checkbox"/>            | 607775     | Susan    | Bates       | 111 Mogden Lane Isleworth MIDDLESEX TW7 7L ...     | test1  | 05/0/      | Update Membership Status |    |
| <input type="checkbox"/>            | 1460108    | Joe      | Bloggs      | Test TWICKENHAM TW2                                | test1  | 05/03/2015 | Merge                    |    |
| <input type="checkbox"/>            | 1109150    | Michael  | Branch      | 1a Conway Road PLUMSTEAD KENT SE18 1AZ             | test1  | 05/03/2015 | Apply For DBS            |    |
| <input type="checkbox"/>            | 714995     | Tom      | Brewis      | Claremont 14-16 Flat 10 St. John's Avenue LONI ... | test1  | 05/03/2015 |                          |    |
| <input type="checkbox"/>            | 1152408    | Tom      | Brewis      | Add1 Cty County Tyrone QA123QA                     | test1  | 05/03/2015 |                          |    |
| <input type="checkbox"/>            | 1582655    | Max      | Burton      | The Rugby Football Union 200 Twickenham Stadi ...  | 123456 | Adult      |                          |    |

Selected 4 of 44 Page 1 of 5

**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

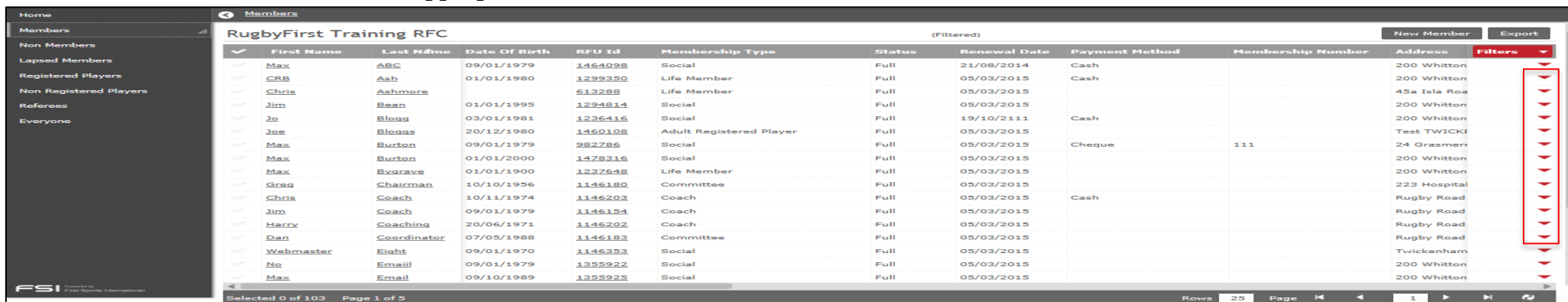
## 3.1 EXPAND EDIT



## 3.1 People – Members - Expand Edit

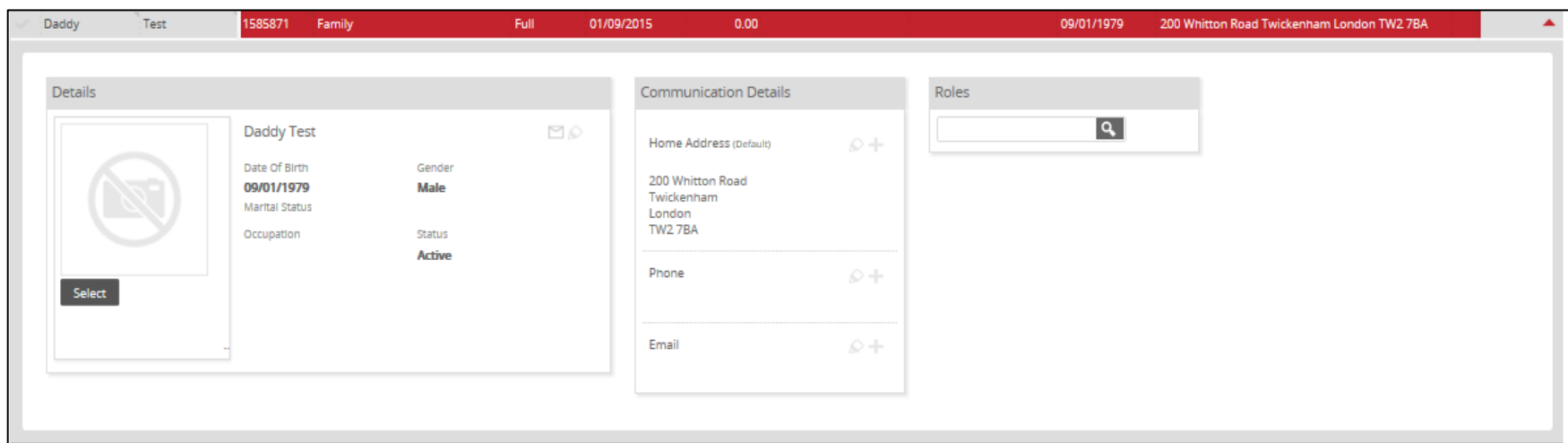
In order for the administrator to make quick changes to their members directly via the membership list, each member has the ability to have their details expanded. Once expanded, pertinent details about the member are displayed and can be edited.

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    | 1299320 | 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         | Blogs       | 03/01/1981    | 1236416 | Social                  | Full   | 19/10/2111   | Cash           |                   | 200 Whitton  |         |
| Joe        | Blogs       | 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 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                  | 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 |  |
|------------------------------|------|------------------------|--------|---|------------|--------------|----------------|--|--|
| <b>Details</b>               |      | Daddy Test             |        | Date Of Birth: 09/01/1979                           |            | Gender: Male | Status: Active |  |  |
| <b>Communication Details</b> |      | Home Address (Default) |        | 200 Whitton Road<br>Twickenham<br>London<br>TW2 7BA |            | Phone        | Email          |  |  |
| <b>Roles</b>                 |      | Search                 |        |   |            |              |                |  |  |

### 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'. At the top, a red header bar contains the member's details: 'Daddy Test', ID '1585871', 'Family', 'Full', '01/09/2015', '0.00', '09/01/1979', and '200 Whitton Road Twickenham London TW2 7BA'. Below this, 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', and 'Status' (Active). The 'Communication Details' section has fields for 'Home Address (Default)' (200 Whitton Road, Twickenham, London, TW2 7BA), 'Phone', and 'Email'. The 'Roles' section features a search input field with a magnifying glass icon. Red arrows point from the text annotations below to these specific elements in the interface.

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    |            |        |
|                         | <a href="#">Max</a> | <a href="#">ABC</a> | 09/01/1979    | <a href="#">1464098</a> | Social          | Full   | 21/08/2014   | Cash           |                   | 200 Whittor |            |            |        |
|                         | <a href="#">CRB</a> | <a href="#">Ash</a> | 01/01/1980    | <a href="#">1299350</a> | 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](mailto: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

**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

**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

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

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

## 3.2 People – Members – Full Edit

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

Daddy Test

Home

Change Password

Communication

Details

Orders

Contacts

Payment History

Relationships

Daddy Test

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

Export

Filters

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

Daddy Test

Home

Change Password

Communication

Details

Orders

Contacts

Payment History

Relationships

Daddy Test

| 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           |           |       |

Export

Filters

Payment history displays any payments for memberships

Daddy Test

Home

Change Password

Communication

Details

Orders

Contacts

Payment History

Relationships

Daddy Test

| 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 |

Export

Filters

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

## 3.2 People – Members – Full Edit

To send a password reminder, select credential. Select the pencil to change the username

Details

Credentials

Roles

Accounts

Communication

My Orders

Payment History

Summary

Relationships

Password

Password

\*\*\*\*\*

User

|            |                  |
|------------|------------------|
| Username   | carimj           |
| Last login | 18/07/2014 15:51 |
| Username   | jcarimber        |
| Last login | 18/07/2014 15:51 |

Password Rules

Passwords must be at least 8 characters long.

Passwords must contain an upper case character.

Passwords must contain a number.

To send a password reminder, select the envelope and an automatic email is sent to the individual, prompting them to update their password.

Password Details

\* Username

jcarimber

Change the username and select Save



**PEOPLE**  
**3.3 CREATE NEW MEMBER (SINGLE)**

### 3.3 People - Members – Create New Member (Single)

From the members grid Select **New Member**

RugbyFirst Training RFC

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    | <a href="#">1464098</a> | Social                  | Full   | 21/08/2014   | Cash           |                   | 200 Whitton  | ▼       |
| ✓ | CRB        | Ash         | 01/01/1980    | <a href="#">1299350</a> | Life Member             | Full   | 05/03/2015   | Cash           |                   | 200 Whitton  | ▼       |
| ✓ | Chris      | Ashmore     |               | <a href="#">613288</a>  | Life Member             | Full   | 05/03/2015   |                |                   | 45a Isla Roa | ▼       |
| ✓ | Jim        | Bean        | 01/01/1995    | <a href="#">1294814</a> | Social                  | Full   | 05/03/2015   |                |                   | 200 Whitton  | ▼       |
| ✓ | Jo         | Blogg       | 03/01/1981    | <a href="#">1236416</a> | Social                  | Full   | 19/10/2111   | Cash           |                   | 200 Whitton  | ▼       |
| ✓ | Joe        | Bloggs      | 20/12/1980    | <a href="#">1460108</a> | Adult Registered Player | Full   | 05/03/2015   |                |                   | Test TWICK   | ▼       |
| ✓ | Max        | Burton      | 09/01/1979    | <a href="#">982786</a>  | Social                  | Full   | 05/03/2015   | Cheque         | 111               | 24 Grasmere  | ▼       |
| ✓ | Max        | Burton      | 01/01/2000    | <a href="#">1478316</a> | Social                  | Full   | 05/03/2015   |                |                   | 200 Whitton  | ▼       |
| ✓ | Max        | Bygrave     | 01/01/1900    | <a href="#">1237648</a> | Life Member             | Full   | 05/03/2015   |                |                   | 200 Whitton  | ▼       |
| ✓ | Greg       | Chairman    | 10/10/1956    | <a href="#">1146180</a> | Committee               | Full   | 05/03/2015   |                |                   | 223 Hospital | ▼       |
| ✓ | Chris      | Coach       | 10/11/1974    | <a href="#">1146203</a> | Coach                   | Full   | 05/03/2015   | Cash           |                   | Rugby Road   | ▼       |
| ✓ | Jim        | Coach       | 09/01/1979    | <a href="#">1146154</a> | Coach                   | Full   | 05/03/2015   |                |                   | Rugby Road   | ▼       |
| ✓ | Harry      | Coaching    | 20/06/1971    | <a href="#">1146202</a> | Coach                   | Full   | 05/03/2015   |                |                   | Rugby Road   | ▼       |
| ✓ | Dan        | Coordinator | 07/05/1988    | <a href="#">1146183</a> | Committee               | Full   | 05/03/2015   |                |                   | Rugby Road   | ▼       |
| ✓ | Webmaster  | Eight       | 09/01/1970    | <a href="#">1146353</a> | Social                  | Full   | 05/03/2015   |                |                   | Twickenham   | ▼       |
| ✓ | No         | Email       | 09/01/1979    | <a href="#">1355922</a> | Social                  | Full   | 05/03/2015   |                |                   | 200 Whitton  | ▼       |
| ✓ | Max        | Email       | 09/10/1989    | <a href="#">1355925</a> | 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



Colchester RFC > New Membership

Select Scheme

Filters

Adult  FAMILY  Junior

Member  Golden

£110 Member  
Member - Full Group Member

0 Golden  
new product

Next

Select which membership type the individual is going to hold



### 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:  First Name:  \* Surname:


**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.)

Insert the details for the new member & Save

**Add Individual**

**Profile Picture**  
  
upload image

**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:   
Country:  \* Postcode:   
Number:  Building:   
Address:

**Add Individuals**

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



### 3.3 People - Members – Create New Member (Single)

Colchester RFC > New Member Place Order

Summary

Membership Scheme

Membership

Name: Member

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 Later 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: Max \* Last Name: Test  
\* Email (17/200): maxburton@rfu.com

Billing Address

Country: TW2 7BA \* Postcode: TW2 7BA  
Number: Rugby House Building  
Address: 200 Whitton Road  
\* City: TWICKENHAM County: MIDDLESEX

The system is asking the administrator to outline how the membership has been paid. Once confirmed select **PAY** or **alternatively select Pay Later (this will enter the member as pending with an outstanding balance)**

Order Success

Details

Your order has been completed successfully. Payment date: 07/07/2014  
Payment Reference: #88833622 Payment time: 14:35  
Please keep a note of you payment reference.

82424043

|   |            |                   |
|---|------------|-------------------|
| <b>Member</b><br>Member - Full Group Member | Quantity:1 | 110.00            |
| Status: <b>Paid</b>                         | Sub Total  | <b>110.00 GBP</b> |

The membership has been assigned



Depending on the payment method selected, the system will either make a record for Cash or Cheque. Online will prompt card details and online payment (not yet a feature)

### 3.3 People - Members – Create New Member (Single)

Colchester RFC

New Member Export

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

Mr James Testing

Profile

Details

Mr James Testing  
Date Of Birth: 09/01/1979  
Gender: [blank]  
Status: Active

Contact

Address: 200 Whitton Road, Twickenham, London 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

Qualifications

Qualifications: 0

Roles

Roles: 0

Registrations

Registrations: 0

Memberships

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

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

MRJames Testing

Export

| Order Refer... | Order Date | Order Total | Balance | Status | Filters |
|----------------|------------|-------------|---------|--------|---------|
| 82424043       | 07/07/2014 | 110.00      |         | Paid   |         |





## 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    | <a href="#">1464098</a> | Social                  | Full   | 21/08/2014   | Cash           |                   | 200 Whitton  | ▼       |
| ✓ | CRB        | Ash         | 01/01/1980    | <a href="#">1299350</a> | Life Member             | Full   | 05/03/2015   | Cash           |                   | 200 Whitton  | ▼       |
| ✓ | Chris      | Ashmore     |               | <a href="#">613288</a>  | Life Member             | Full   | 05/03/2015   |                |                   | 45a Isla Roa | ▼       |
| ✓ | Jim        | Bean        | 01/01/1995    | <a href="#">1294814</a> | Social                  | Full   | 05/03/2015   |                |                   | 200 Whitton  | ▼       |
| ✓ | Jo         | Blogg       | 03/01/1981    | <a href="#">1236416</a> | Social                  | Full   | 19/10/2111   | Cash           |                   | 200 Whitton  | ▼       |
| ✓ | Joe        | Bloggs      | 20/12/1980    | <a href="#">1460108</a> | Adult Registered Player | Full   | 05/03/2015   |                |                   | Test TWICK   | ▼       |
| ✓ | Max        | Burton      | 09/01/1979    | <a href="#">982786</a>  | Social                  | Full   | 05/03/2015   | Cheque         | 111               | 24 Grasmere  | ▼       |
| ✓ | Max        | Burton      | 01/01/2000    | <a href="#">1478316</a> | Social                  | Full   | 05/03/2015   |                |                   | 200 Whitton  | ▼       |
| ✓ | Max        | Bygrave     | 01/01/1900    | <a href="#">1237648</a> | Life Member             | Full   | 05/03/2015   |                |                   | 200 Whitton  | ▼       |
| ✓ | Greg       | Chairman    | 10/10/1956    | <a href="#">1146180</a> | Committee               | Full   | 05/03/2015   |                |                   | 223 Hospital | ▼       |
| ✓ | Chris      | Coach       | 10/11/1974    | <a href="#">1146203</a> | Coach                   | Full   | 05/03/2015   | Cash           |                   | Rugby Road   | ▼       |
| ✓ | Jim        | Coach       | 09/01/1979    | <a href="#">1146154</a> | Coach                   | Full   | 05/03/2015   |                |                   | Rugby Road   | ▼       |
| ✓ | Harry      | Coaching    | 20/06/1971    | <a href="#">1146202</a> | Coach                   | Full   | 05/03/2015   |                |                   | Rugby Road   | ▼       |
| ✓ | Dan        | Coordinator | 07/05/1988    | <a href="#">1146183</a> | Committee               | Full   | 05/03/2015   |                |                   | Rugby Road   | ▼       |
| ✓ | Webmaster  | Eight       | 09/01/1970    | <a href="#">1146353</a> | Social                  | Full   | 05/03/2015   |                |                   | Twickenham   | ▼       |
| ✓ | No         | Email       | 09/01/1979    | <a href="#">1355922</a> | Social                  | Full   | 05/03/2015   |                |                   | 200 Whitton  | ▼       |
| ✓ | Max        | Email       | 09/10/1989    | <a href="#">1355925</a> | 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

Select Membership Colchester RFC > New Membership

Member Details

Summary

Select Scheme

Filters

Adult  FAMILY  Junior

Family Family Membership

E0 Family Family member with one junior

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

**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.)

Insert the details for the new member & Save

**Add Individual**

**Profile Picture**  
upload image

**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: |

### 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, there are two buttons: "Next" and "Create New Individual". Below the title, there is a dropdown menu for "Family Membership" with a red box around it. The dropdown shows "Family Membership" and "Up to 2 adults. Up to 3 juniors." Below this is a search form titled "Find people by name" with fields for "Title" (Mr), "First Name" (Mum), and "Surname" (Family), and a "Search" button. To the right of the search form is a "Members" list with a red box around the first entry: "Mr Dad Family" with contact details "T: E:maxburton@rfu.com DOB:01 January 1970". Red arrows point from the text annotations to these elements.

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**

The screenshot shows a web form titled "Add Individuals" with a "Next" button in the top right corner. The form is divided into several sections:

- Family Membership:** A section with a dropdown menu currently set to "Family Membership". Below it, text indicates "Up to 2 adults." and "Up to 3 juniors."
- Find people by name:** A search section with fields for "Title" (set to "Mr"), "First Name" (set to "Junior"), and "Surname" (set to "Family"). A "Search" button is located below these fields.
- Members:** A list of three family members, each with a "Primary Member" radio button and a "\* Relationship To Primary" dropdown menu. The members are:
  - Mr Dad Family:** Primary Member (selected), Relationship To Primary: Other. Contact: T: E:maxburton@rfu.com DOB:01 January 1970.
  - Mr Mum Family:** Primary Member (not selected), Relationship To Primary: Other. Contact: T: E:mom@rfu.com DOB:10 October 2000.
  - Mr Junior Family:** Primary Member (not selected), Relationship To Primary: Other. Contact: T: E:test@rfu.com DOB:01 January 2005.
- Relationship Dropdown:** A separate dropdown menu on the right side of the form, currently set to "Other". It lists the following relationship options: Other, Parent, Child, Sibling, Husband, Wife, and Partner. Three red arrows point from the "Relationship To Primary" dropdowns in the "Members" section to this relationship dropdown menu.



### 3.3 People - Members – Create New Member (Family)

Confirm the Membership

**Colchester RFC > New Member** Place Order

Summary

**Membership Scheme**

**Membership**

Name: Family Membership

Description: Family Membership

Unit Price: 50.000

**Members**

- Mr Dad Family  
T: [maxburton@rfu.com](mailto:maxburton@rfu.com) DOB:01/01/1970
- Mr Mum Family  
T: [mom@rfu.com](mailto:mom@rfu.com) DOB:10/10/2000
- Mr Junior Family  
T: [Etest@rfu.com](mailto:Etest@rfu.com) DOB:01/01/2005

**Order Summary** Pay

**Payment**

Method:  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 Whetton Road \* City: TWICKENHAM County: MIDDLESEX

Order 34491403 | 50.00 GBP

Promotions: Promotional Code: Apply

How the membership is being paid and whether now or later.



### 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 Reference: **#57984455**  
Please keep a note of you payment reference.

Payment date: **07/07/2014**  
Payment time: **16:37**

34491403

|   |             |       |
|---|-------------|-------|
| <b>Family Membership</b><br>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     | Members   All Members |           |         |                   |         |              |         |                |                   |               |         | New Member | Export  |
|-------------|-----------------------|-----------|---------|-------------------|---------|--------------|---------|----------------|-------------------|---------------|---------|------------|---------|
| All Members | Colchester RFC        |           |         |                   |         |              |         |                |                   |               |         | Clear      | Search  |
| maxwell     | First Name            | Last Name | RFU Id  | Membership Type   | Status  | Renewal Date | Balance | Payment Method | Membership Number | Date Of Birth | Address | Phone      | Filters |
|             | Starts With           | Family    |         |                   |         |              |         |                |                   |               |         |            |         |
|             | 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**

|   |  |  |
|---|--|--|
| <b>Details</b>  | <b>Contact</b>   | <b>Status</b>                                |
| <br><b>Mr Dad Family</b><br>Date Of Birth: <b>01/01/1970</b><br>Gender:<br>Status: <b>Active</b> | Address:<br>200 RFDL<br>Twickenham Stadium<br>Whitton Road<br>TWICKENHAM<br>MIDDLESEX<br>TW2 7BA<br>Email:<br><a href="mailto:maxburton@rfu.com">maxburton@rfu.com</a> | Status: <b>Active</b><br>Created: 07/07/2014 |
|   |  | <b>Money Outstanding</b>                     |
|   |  | GBP: <b>0.00</b>                             |

|   |                          |   |
|---|--------------------------|---|
| <b>Activity</b>   | <b>Qualifications</b>    | <b>Roles</b>  |
| User: <b>Maxwell</b><br>Last login: <b>07/07/2014</b> 14:11   | Qualifications: <b>0</b> | Roles: <b>0</b>   |
| <b>Relationships</b>  | <b>Registrations</b>     | <b>Memberships</b>  |
| <b>Mr Mum Family</b> (Active)<br>Other relationship from 07/07/2014 to Current<br><b>Mr Junior Family</b> (Active)<br>Other relationship from 07/07/2014 to Current | Registrations: <b>0</b>  | <b>Family Membership</b> (Full)<br>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

The image displays two screenshots of the RugbyFirst Training RFC membership grid. The top screenshot shows the grid with the filter panel closed. The bottom screenshot shows the filter panel expanded, with a red circle highlighting the 'Filters', 'Clear', and 'Search' buttons. The grid contains the following data:

| 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                  |        |              |                |                   |              |         |

### 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**

Complete Search Criteria available



### 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 a web interface for a membership list. On the left is a sidebar with navigation options: Membership, Membership List (selected), Pending Membership, Communication History, Membership Types, and Merge Individuals. The main area is titled 'Membership List' and contains a grid of members. Above the grid is a filter bar with a dropdown menu set to 'Adult'. To the right of the grid are buttons for 'Export', 'New', 'Filters', 'Clear', and 'Search'. A red box highlights the 'Adult' dropdown menu, and red arrows point from the annotations to the 'Clear' and 'Search' buttons.

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



## 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    | <a href="#">1464098</a> | Social                  | Full   | 21/08/2014   | Cash           |                   | 200 Whitton  |         |
| ✓ | CRB        | Ash         | 01/01/1980    | <a href="#">1299350</a> | Life Member             | Full   | 05/03/2015   | Cash           |                   | 200 Whitton  |         |
| ✓ | Chris      | Ashmore     |               | <a href="#">613288</a>  | Life Member             | Full   | 05/03/2015   |                |                   | 45a Isla Roa |         |
| ✓ | Jim        | Bean        | 01/01/1995    | <a href="#">1294814</a> | Social                  | Full   | 05/03/2015   |                |                   | 200 Whitton  |         |
|   | Jo         | Blogg       | 03/01/1981    | <a href="#">1236416</a> | Social                  | Full   | 19/10/2111   | Cash           |                   | 200 Whitton  |         |
|   | Joe        | Bloggs      | 20/12/1980    | <a href="#">1460108</a> | Adult Registered Player | Full   | 05/03/2015   |                |                   | Test TWICK   |         |
|   | Max        | Burton      | 09/01/1979    | <a href="#">982786</a>  | Social                  | Full   | 05/03/2015   | Cheque         | 111               | 24 Grasmere  |         |
|   | Max        | Burton      | 01/01/2000    | <a href="#">1478316</a> | Social                  | Full   | 05/03/2015   |                |                   | 200 Whitton  |         |
|   | Max        | Bygrave     | 01/01/1900    | <a href="#">1237648</a> | Life Member             | Full   | 05/03/2015   |                |                   | 200 Whitton  |         |
|   | Greg       | Chairman    | 10/10/1956    | <a href="#">1146180</a> | Committee               | Full   | 05/03/2015   |                |                   | 223 Hospital |         |
|   | Chris      | Coach       | 10/11/1974    | <a href="#">1146203</a> | Coach                   | Full   | 05/03/2015   | Cash           |                   | Rugby Road   |         |
|   | Jim        | Coach       | 09/01/1979    | <a href="#">1146154</a> | Coach                   | Full   | 05/03/2015   |                |                   | Rugby Road   |         |
|   | Harry      | Coaching    | 20/06/1971    | <a href="#">1146202</a> | Coach                   | Full   | 05/03/2015   |                |                   | Rugby Road   |         |
|   | Dan        | Coordinator | 07/05/1988    | <a href="#">1146183</a> | Committee               | Full   | 05/03/2015   |                |                   | Rugby Road   |         |

Selected 4 of 103 Page 1 of 5 Rows 25 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

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

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

The screenshot displays the 'Membership List (Filtered)' interface. At the top right, there are buttons for 'Selected 3', 'Export', 'More', and 'New'. The 'More' button is highlighted with a red box. A context menu is open on the right, listing actions: 'Add To Group', 'Send eMail' (highlighted with a red box), 'Delete Individual', 'Update Membership Status', 'Merge', and 'Apply For D'S'. A table of members is shown below, with the first three rows selected. A red box highlights the checkboxes for these three rows. A red arrow points from the 'More' button to the 'Send eMail' option in the menu. Another red arrow points from the 'Send eMail' option to the 'Send eMail' text in the bottom right callout box. A third red arrow points from the checkboxes of the first three rows to the 'Select which member(s) to Email...' text in the bottom left callout box.

| ✓ | ▶ 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 Stad ...  | 123456              | Adult           | ▼       |

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

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 an '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:** Includes fields for **\* Attach Name** and **Description**, and buttons for **Select** and **Upload**.
- Buttons:** **Add Recipients**, **send e-mail**, and **Send email**.
- Rich Text Editor:** Includes a toolbar with options for **Format**, **Font**, **Size**, **B**, **I**, **U**, and a large text area for the email body.

Annotations with red arrows point to:

- Add Recipients** button: Points to the **Add Recipient** modal window.
- send e-mail** button: Points to the **Send email** button.
- Select** button: Points to the **It is possible to attach a document to the email** text box.
- Upload** button: Points to the **It is possible to attach a document to the email** text box.
- Rich Text Editor:** Points to the **Insert the body of the text** text box.

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

Send email

It is possible to attach a document to the email

Insert the body of the text





## 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 |
|---------|------------|-------------|---|-------------------|-----------------|
| 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

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

Group Individual

Select a group

OR

Enter a new group name

Add

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' interface. On the left, a sidebar lists 'Test' and 'Testing'. The main area shows details for the 'Test' group, including 'Date Created : 01/04/2014', 'Creator : Maxwell Burton', and 'Number of Records : 3'. Below this is a 'Membership List (Filtered)' table with columns for RFU ID, RFUID, Known As, First Name, Last Name, Address, and Membership N. The table contains three rows of member data. At the top right, there are 'Copy List' and 'Delete List' buttons. At the bottom right, there are 'Export' and 'New' buttons. A 'Filters' icon is also present. The bottom of the interface shows 'Selected 0 of 3', 'Page 1 of 1', and pagination controls for 10 rows per page.

| ✓ | ▶ RFU ID | ▶ RFUID | ▶ Known As | ▶ First Name | ▲ Last Name | ▶ Address                           | ▶ Membership N | Filters |
|---|----------|---------|------------|--------------|-------------|-------------------------------------|----------------|---------|
| ▼ | 1263974  |         |            | Luke         | Andsee      | 54 Bamboo Street Plumstead SE18 3AA |                | ▼       |
| ▼ | 613288   |         |            | Chris        | Ashmore     | 45a Isla Road London SE18 3AA       |                | ▼       |
| ▼ | 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

Removing an individual from the club, 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             |                 |         |
| ✓ | 1548167 |            | 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** OK Cancel

New Status Deleted

Comments

Member Message  
Mr Test BasicOk to update.

Select which members to Delete or use the filter

Select More & Delete

Confirm Delete

Confirming which members are to be deleted

### 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.

The screenshot shows the 'Membership List (Filtered)' interface. A table lists members with columns for RFU ID, First Name, Last Name, Address, Membership Number, and Membership Type. Three members are selected, indicated by checkmarks in the first column. A 'More' dropdown menu is open, showing options like 'Update Membership Status'. An 'Update Status' dialog box is shown, with a 'New Status' dropdown and a 'Confirm Update' button. A 'Confirming which status to assign' box points to the 'New Status' dropdown. A 'Confirming which members are to be deleted' box points to the 'Member' and 'Message' columns in the dialog. A 'Select More & Update Status' box points to the 'More' dropdown. A 'TIP' box at the bottom states: 'Lapsed will remove the individual from the Members grid and move them to Lapsed Members'. A status dropdown menu shows 'Full' and 'Lapsed' options.

| RFU ID  | First Name | Last Name   | Address  | Membership Number | Membership Type |
|---------|------------|-------------|--|-------------------|-----------------|
| 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    | Beech       | 15 Gosney Road PLUMSTEAD KENT SE18 1A7         | test1             |                 |
|         | To         |             |  |                   |                 |
|         | To         |             |  |                   |                 |
|         | 1582655    | Ma          |  |                   |                 |

**Update Status**

New Status: [Dropdown]

Member: Mr Crb Ash, Mr Max Abc  
Message: Ok to update., Ok to 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)

RugbyFirst Training RFC (Filtered) Selected 2 Export More

| ✓ | 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  | Clear   |
| ✓ | CRB        | Ash       | 01/01/1980    | 1299350 | Life Member             | Full   | 05/03/2015   | Cash           |                   | 200 Whitton  | Search  |
| ✓ | 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   |         |

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

Select More & Merge

#### Merge Individuals

| 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"/>                               |

Please be aware that using this merge function will merge additional associated data such as Roles, Contact information, Membership Registrations, Player Registrations, Discipline Suspensions, Notes, Attachments, Data Protection information, Passport information, Waivers, Police Check information, Orders and Purchases, Attributes and User Accounts. You should also be aware that if either individual has participated in an Event, such as a Course, these Events and related Achievements, Awards, Licences and Accreditations will also be merged.

Save Cancel

Select which data to keep & Save

Select which members to Merge or use the filter





## 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 Laira Road Plyr ... | (0) 7702 626266  | d_mrose@sky.com            | 15.00   | No     |             |         |                |              |            |               |                 |  |  |  |  |  |
| ✓               | Elizabeth   | Townsend         | 31023  | 09/09/1964    | 15 Mount Road Cranlej ...   | (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:

Description:

Unit Price:

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: Gary  
\* Last Name: Townsend  
\* Email (20/200): garytownsend@rfu.com

Billing Address

Country: [Dropdown]  
\* Postcode: BS20 6UT  
Number: 13  
Building: [Text]  
\* Address: Falcon Close  
Portishead

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<br>Testing product | Quantity:1 | 10.00            |
| Status: <b>Paid</b> |                            | Sub Total  | <b>10.00 GBP</b> |
| 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 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  |
| ✓ | Test       | User - Do Not De | 337    | 22/07/1998    | Rugby Road Twickenha ...     |                 | support@attenda.net        | 0.00    | No     |             |     | Export          |
| ✓ | Peter      | Baines           | 528713 | 05/07/1942    | 20a Sandpit Lane St. All ... | (0) 1727 863397 | peter.baines@salaw.com     | 0.00    | No     |             |     | Email           |
| ✓ | Tom        | Fitzgerald       | 530467 | 11/10/1950    | 25 The Ridings Whittle- ...  | (0) 1257 261154 | tom.fitzgerald@lancashl... | 0.00    | No     |             |     | Merge           |
| ✓ | Jo         | Bloggs           | 536415 |               | 30 High Path Road Gull ...   |                 | linda@objectiveinternet... | 0.00    | No     |             |     | Apply For DBS   |
| ✓ | Andy       | Mutch            | 537139 | 13/12/1978    |                              |                 |                            |         |        |             |     | Request Payment |
| ✓ | 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** Place Order

Summary

Membership Scheme

Membership  
Name:   
Description:

Unit Price:

Members

- Mr Andy Mutch  
T:91830 089 890 E:Mutchy@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

|  |  |  |
|--|--|--|
| <p><b>Method</b></p> <p>Please check the order items below and the final payment amount.</p> <p>Click the pay button to continue.</p> <p><input checked="" type="radio"/> Cash <input type="radio"/> Cheque</p> <p>Online payments are not currently configured for this club.</p> | <p><b>Payee</b></p> <p>* First Name <input type="text" value="Maxwell"/> * Last Name <input type="text" value="Burton"/></p> <p>* Email (0/200) <input type="text"/></p> | <p><b>Billing Address</b></p> <p>Country <input type="text" value=""/> * Postcode <input type="text" value="KT14 7BU"/></p> <p>Number <input type="text" value="24"/></p> <p>Building <input type="text"/></p> <p>* Address <input type="text" value="Grasmere Way"/></p> <p><input type="text"/></p> <p>Byfleet <input type="text"/></p> <p>* City <input type="text" value="West Byfleet"/> County <input type="text" value="SURREY"/></p> |
|--|--|--|

Orders

|  |                                 |
|--|---------------------------------|
| <input checked="" type="checkbox"/> Order 105434   10.00 GBP   | <input type="button" value=""/> |
| <input checked="" type="checkbox"/> Order 5339260   10.00 GBP  | <input type="button" value=""/> |
| <input checked="" type="checkbox"/> Order 74691942   10.00 GBP | <input type="button" value=""/> |



## 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 date      |
| Payment Reference                            | <b>#26448682</b> | <b>30/07/2014</b> |
| Please keep a note of you payment reference. |                  | Payment time      |
|  |                  | <b>11:01</b>      |
| <hr/>  |                  |                   |
| 105434                                       |                  |                   |
| <b>Testing</b>                               | Quantity:1       | 10.00             |
| Testing product                              |                  |                   |
| <hr/>  |                  |                   |
| Status: <b>Paid</b>                          | Sub Total        | <b>10.00 GBP</b>  |
| 10.00  |                  |                   |
| 5339260                                      |                  |                   |
| <b>Testing</b>                               | Quantity:1       | 10.00             |
| Testing product                              |                  |                   |
| <hr/>  |                  |                   |
| Status: <b>Paid</b>                          | Sub Total        | <b>10.00 GBP</b>  |
| 20.00  |                  |                   |
| 74691942                                     |                  |                   |
| <b>Testing</b>                               | Quantity:1       | 10.00             |
| Testing product                              |                  |                   |
| <hr/>  |                  |                   |
| Status: <b>Paid</b>                          | Sub Total        | <b>10.00 GBP</b>  |
| 30.00  |                  |                   |
|  |                  | <hr/>             |
| Grand Total                                  |                  | <b>30.00 GBP</b>  |

## 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        |              |            |        |  |  |  |
| ?               |               |                  |        |               |                              |                 |                           |         |        |             |            |              |            |        |  |  |  |
| ✓               | 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 Laira 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@lancashrre... | 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 Postbr ...    | (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 Next

Select Scheme

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 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@lancashlrugby.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

Summary Place Order

Membership Scheme

Membership Name:

Description:

Unit Price:

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:27/03/1957
- Mr Martin Griffiths  
T:(0) 7785 390360 E:martin.gerardgriffiths@ntlworld.com

### Order Summary

Payment

Method:  Cash  Cheque

Payee: \* First Name:  \* Last Name:   
\* Email (26/200):

Billing Address: Country:  \* Postcode:   
Number:   
Building:   
\* Address:   
\* City:  County:

Order Summary:  Order 37461458 | 10.00 GBP

### Order Success

Details

Your order has been completed successfully.

Payment Reference: #85710729  
Payment date: 30/07/2014  
Payment time: 09:45

Please keep a note of your payment reference.

|              |                     |            |           |
|--------------|---------------------|------------|-----------|
| 37461458     | Family Test         | Quantity:1 | 10.00     |
|              | Family Test product |            |           |
| 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 – Pending 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 ENGL   |            |        |

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

### 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

\* City  County

Order 14043466 | 10.00 GBP







## 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, they 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 | otherna | lastnam | gender | dob        | number | building | address1     | address | address | city       | county    | country | postalcode | telhome | telmobil | 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

**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

Bulk Upload.csv

Browse Upload

Files to Import

**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

✕ Bulk Upload.csv ✕

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 'Everyone' grid for the Rugby Football Union. The grid contains the following data:

| 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 WELLI ... | 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 High ...  | 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     |         |

The 'Bulk Upload' modal is open, showing the 'Create Lists' section with a 'Download the bulk update spreadsheet template' button highlighted. The 'Upload list files' section has a 'Browse' button. The 'Files to Import' section is empty.

**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.

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          | <span>Error Records</span> |

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 | ▼ |
|---|------|--------|---------|--|------------------|---------|----|---|

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

