

**Microsoft Partner**  
Silver Application Development

**FIRSTSPORTS**

**GMS – People**

**Create New Member(s)**

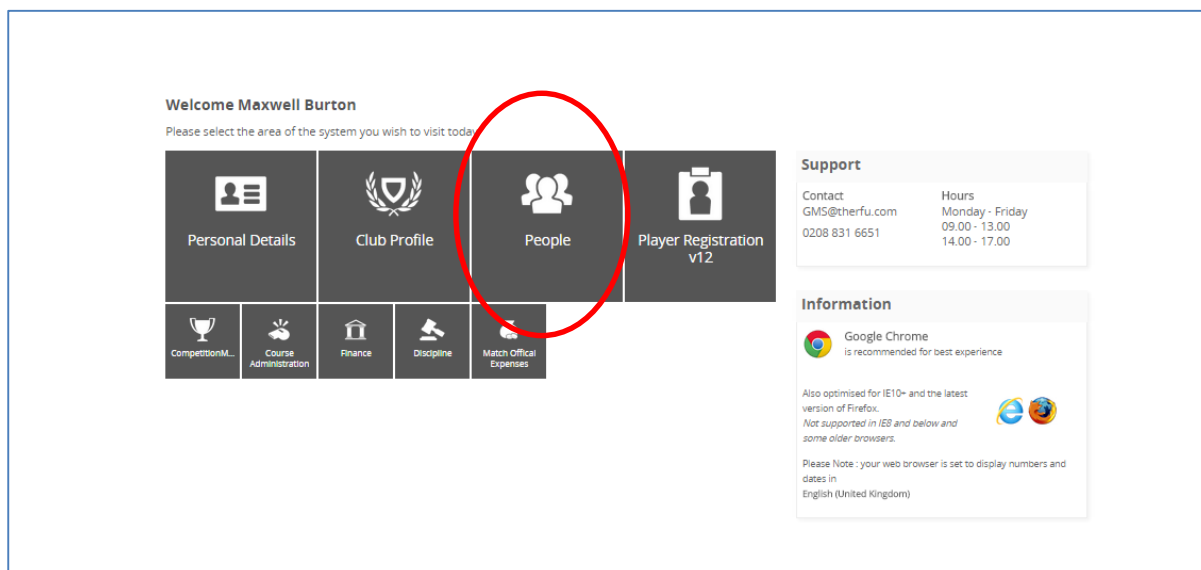
**Single or Multiple**

## Introduction

1. Create New Member
2. Adding a New Member to a £0 (No cost) scheme
3. Adding a New Member to a scheme with a fee
  - 3.1 Online Card
  - 3.2 Pay Now
  - 3.3 Pay Later
4. Creating New Member – Family (Multiple Individuals against the same scheme)

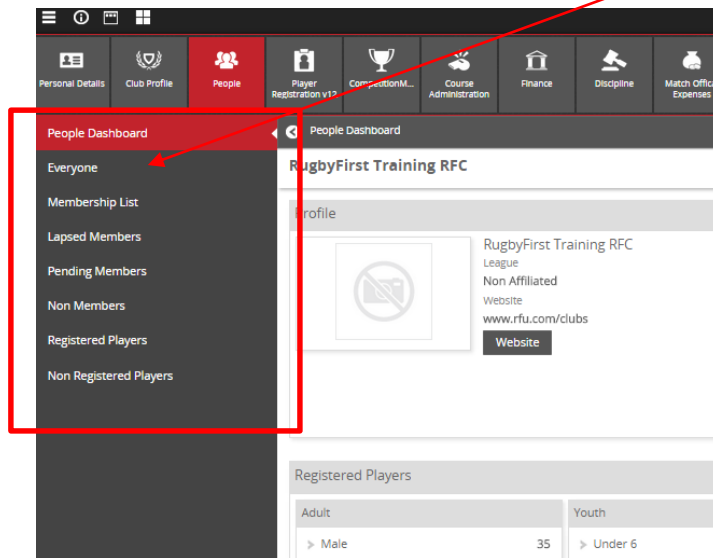
### 1. Create New Member

To create a new member, the user must select **People**



From People the Dashboard will load. Below the People Dashboard heading in the left hand navigation, there are a number of grids. These grids represent the different membership statuses an individual currently holds. i.e. If their membership has expired they will appear in Lapsed.

It is possible via any of these grids to create a new member. To do this, **Select a Grid**



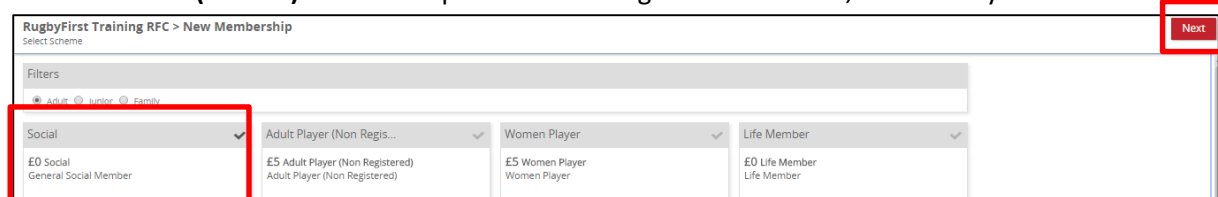
From the Grid, select **New Member**

| RugbyFirst Training RFC |            |               |         |               |                            |                 |        |         |         |        |         |        | New Member  |    |         | Export | Email | Bulk Upload |
|-------------------------|------------|---------------|---------|---------------|----------------------------|-----------------|--------|---------|---------|--------|---------|--------|-------------|----|---------|--------|-------|-------------|
| Membership List         | First Name | Last Name     | RFUID   | Date Of Birth | Address                    | Phone           | E-mail | Balance | Source  | Member | Contact | Player | Player Type | DE | Filters |        |       |             |
| Lapsed Members          |            |               |         |               |                            |                 |        |         |         |        |         |        |             |    | Clear   |        |       |             |
| Pending Members         |            |               |         |               |                            |                 |        |         |         |        |         |        |             |    | Search  |        |       |             |
| Non Members             | Chrome     | Women         | 1581227 | 09/01/1979    | 200 Whitton Road Twid ...  |                 |        | 0.00    | Contact | Yes    | Yes     | No     |             |    |         |        |       |             |
| Registered Players      | Webmaster  | One           | 1146147 | 14/08/1970    | 3 Rugby Road MIDDLELES ... | 112233 44556677 |        | 0.00    | Contact | Yes    | Yes     | No     |             |    |         |        |       |             |
| Non Registered Players  | Elaine     | RFTRRegistrar | 1057727 |               |                            |                 |        | 0.00    | Member  | Yes    | Yes     | No     |             |    |         |        |       |             |
|                         | Adam       | RFTRRegistrar | 1057720 |               |                            |                 |        | 0.00    | Member  | Yes    | Yes     | No     |             |    |         |        |       |             |
|                         | Player     | Test 4        | 1146159 | 06/06/1975    | Rugby Road Twickenha ...   | 112233 44556677 |        | 0.00    | Contact | Yes    | Yes     | No     |             |    |         |        |       |             |

Select the relevant scheme (some schemes may be free £0.00, some will have a cost associated to them £100.00, the club sets up the schemes)

## 2. Adding a Free Scheme to the New Member

Select the **Free (£0 cost)** membership scheme to assign that individual, followed by **Next**



The system will now prompt you to search the club to see if that individual already exists to avoid creating a duplicate, Enter the individuals details and **Search**

**(NOTE: The search does not currently search across the whole database, it only searches the club the user is at. Clubs and CB's cannot currently bring across a coach from another club into your database)**

### Add Individuals

Social  
General Social Member

Find people by name

Title  First Name

\* Last Name

Any search results will be displayed, if the individual already exists, simply assign the membership scheme to the existing record, if it is a new member, select **Create New Individual**

### Add Individuals

Next

Social  
General Social Member

Find people by name

Title  First Name

Mr  Max

\* Last Name

Members (0)  
No individuals currently added to this membership

- MR Maxwell Test (ID:1098807) T:(0) 1 919 1122343 DOB:09 January 1979  
200 Whitton Road Twickenham Middlesex KT14 7BU
- MR Max Test 1 (ID:1053053) E:mlord@first-sports.com DOB:09 January 1979  
Rugby House Rugby Roa Twickenham Middlesex TW1 1DZ  
Active Family membership valid to 13/08/2015
- MR Max Test (ID:1538162) DOB:09 January 2005  
8 Quakers Close Northampton Northamptonshire NN7 3NZ
- MR Max Test (ID:1599619) DOB:09 January 2000  
Dukeries Community College Whinney Lane Newark Nottinghamshire NG22 9TD
- MR Max Test (ID:1447773) DOB:09 January 1979  
200 Whitton Road Twickenham Middlesex TW2 7BA
- MR Max Test 11 (ID:1099822) E:tesh@rest.com DOB:09 January 1994  
Rugb Y House MIDDLESEX CORNWALL TW2 1 DS  
Active Family membership valid to 13/08/2015
- MR Maxwell Test (ID:1525307) DOB:09 January 2005

Enter the individual's details & **Save** (NOTE: First Name, Last Name, DOB, Postcode and Email are mandatory)

### Add Individual

Profile Picture

Individual

\* Title  \* First Name

Mr  Max

Middle Names

\* Last Name

Test

Gender  \* Date Of Birth

Male  09/01/1979

Contact Details

Phone  Area Code  Extension

Local Number

Email

\* Email (18/200)

maxburton@rfu.com

Address

Country  \* Postcode

UNITED KINGDOM  TW2 7BA

Number  Building

200

\* Address

Whitton Road

\* City  County

Twickenham  MIDDLESEX

Place the order

Member Details Cancel **Place Order**

**Details**

1 Members added to order

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**Social**

£10.00      1 YEAR

Start Date: 09 February 2015      Renewal Date: 01 September 2015

Social product

**Mr Max Test** Edit Remove

Date Of Birth: 09/01/1979      Gender:

Email: mburton@first-sports.com      Full Phone:

Address: 200 Whitton Road  
TWICKENHAM  
ENGLAND  
TW2 7BA

The 'Order' has been confirmed and the individual will now appear in the **Membership Grid & Everyone** (based on the membership scheme duration, once the renewal date passes, the individuals will be removed from Membership and entered into Lapsed)

Order Detail Print Return

**Order Information**

Social General Social Member Membership 1642923      0.00 Qty: 1      0.00

---

**Cost**

Total      0.00 GBP

---

**Payment Information**

17/10/2014 - Free - Paid      0.00

Total Paid      0.00 GBP

**Contact Details**

Max Test  
200 Whitton Road  
TWICKENHAM  
MIDDLESEX  
UNITED KINGDOM  
TW2 7BA  
[lenny@theblock.com](mailto:lenny@theblock.com)

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**Club Details**

RugbyFirst Training RFC  
Rugby House  
Twickenham Stadium  
200 Whitton Road  
Twickenham  
MIDDLESEX  
ENGLAND  
TW2 7BA  
[test@test.com](mailto:test@test.com)  
+44 (0) 7545 921483

RugbyFirst Training RFC New Member Export

| Membership Type | First Name | Last Name | RFU Id  | Status | Renewal Date | Balance | Membership Number | Date Of Birth | Address | Phone | Filters      |
|-----------------|------------|-----------|---------|--------|--------------|---------|-------------------|---------------|---------|-------|--------------|
| Social          | Max        | Test      | 1804330 | Active | 14/07/2015   | 0.00    |                   | 09/01/1979    |         |       | Clear Search |

3. Adding a New Member to a Membership that incurs a cost

Select the membership scheme that applies to the individual (in this case the £5 Adult Player scheme), followed by **Next**

RugbyFirst Training RFC > New Membership **Next**

Select Scheme

Filters:  Adult  Junior  Family

|                                 |   |                                 |                               |
|---------------------------------|---|---------------------------------|-------------------------------|
| Social                          | <b>Adult Player (Non Regis...)</b>                                | Women Player                    | Life Member                   |
| £0 Social General Social Member | £5 Adult Player (Non Registered)<br>Adult Player (Non Registered) | £5 Women Player<br>Women Player | £0 Life Member<br>Life Member |

The system will now prompt you to search the club to see if that individual already exists to avoid creating a duplicate, Enter the individuals details and **Search**

**(NOTE: The search does not currently search across the whole database, it only searches the club the user is at. Clubs and CB's cannot currently bring across a coach from another club into your database)**

**Add Individuals**

Social  
Social  
General Social Member

Find people by name

Title  First Name

\* Last Name

Any search results will be displayed, if the individual already exists, simply assign the membership scheme to the existing record, if it is a new member, select **Create New Individual**

**Add Individuals**

Social  
Social  
General Social Member

Find people by name

Title  First Name

Mr  Max

\* Last Name

Members (0)  
No individuals currently added to this membership

- MR Maxwell Test (ID:1098807) TADJ | 919 11 22343 008-09 January 1979  
200 Whitton Road Twickenham Middlesex KT14 7BU
- MR Max Test 1 (ID:1093053) Emlord@first-sports.com 008-09 January 1979  
Rugby House Rugby Row Twickenham Middlesex TW1 1DE  
Active Family membership valid to 13/08/2015
- MR Max Test (ID:1538182) 008-09 January 2005  
3 Quakers Close Northampton Northamptonshire NN7 3NZ
- MR Max Test (ID:1599619) 008-09 January 2000  
Dukeries Community College Whinney Lane Newark Nottinghamshire NG22 9TD
- MR Max Test (ID:1447773) 008-09 January 1979  
200 Whitton Road Twickenham Middlesex TW2 7BA
- MR Max Test 11 (ID:1099822) Etest@test.com 008-09 January 1994  
Rugby House MIDDLESEX CORNWALL TW2 1 DS  
Active Family membership valid to 13/08/2015
- MR Maxwell Test (ID:1525302) 008-09 January 2005

Enter the individual's details & **Save** (NOTE: First Name, Last Name, DOB, Postcode and Email are mandatory)

**Add Individual**

Profile Picture

Individual  
\* Title  \* First Name

Mr  Max

Middle Names

\* Last Name

Test

Gender

Male

\* Date Of Birth

09/01/1979

Contact Details  
Phone  
Area Code  Extension

Local Number

Email  
\* Email (18/200)

maxburton@rfu.com

Address  
Country

UNITED KINGDOM  \* Postcode

TW2 7BA

Number  Building

200

\* Address

Whitton Road

\* City  County

Twickenham  MIDDLESEX

Place the order (at this point it is also possible to amend the member by selecting the pencil or removing them completely by selecting the X)

The order summary page details the membership and payment details. Due to their being a cost for the membership scheme, the screen now prompts the administrator to detail how the member has paid for the scheme and whether they have 'Paid' or 'Paying Later'

The page details the cost, the individual details and how they have paid.

The payment method allows the club to demonstrate how the individual paid for their membership

The choices are:

Other – Manual Entry with comments box

Cheque – Manual entry with Cheque number text box

Cash – Manual entry with comments box

Online Card – Allows the administrator to enter the bank card for the member and take payment (See finance – set up required and transaction fee incurred)

Regarding 'Pay Now' and 'Pay Later' this will set two separate statuses

**Pay Now** – Makes the individual fully paid up (Active) member of the club. They will also appear in the Membership Grid and Everyone

**Pay Later** – Leaves the balance remaining against the individual, they will appear in the Pending and Everyone grids with an outstanding balance

### 3.1 Online Card

If the organisation has been set up for online payments, selecting 'Online Card' will open text boxes, pre populated with the individuals details.

Order Summary

Cancel Pay Now Pay Later

Orders

Order: 40263737 | Richard Ackroyd | 10.00 GBP

|  |                 |           |
|--|-----------------|-----------|
| Junior Player (Girls)<br>Junior player (Girls)<br>Mr Richard Ackroyd membership at Chobham RFC | 10.00<br>Qty: 1 | 10.00     |
| Sub Total  |                 | 10.30 GBP |

Payment Method

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

Online Card
  Cash
  Cheque
  Other

\* First Name: Richard  
 \* Last Name: Ackroyd  
 \* Email (0/200):  
 Building:  
 Number: 1  
 \* Address1: Hill Close  
 \* City: Woking  
 Country: SURREY  
 \* Postcode: GU21 4TE  
 \* Country: ENGLAND

Select **Pay Later** will ask the administrator if a request payment email is required. This will send an email to the member with a link that can be selected and they can pay online for the membership

Send e-mail

Do you want to send a payment request e-mail?

Yes No

blackhole@first-sports.com

Send e-mail Return

Email From Display: blackhole@first-sports.com

To: 1 Email Addresses: 1 Adults 0 Youths (0 Parents)

\* Email Subject: Membership Payment Request

Message Body

Dear Max Test,  
Please be informed that you have an outstanding balance for your membership at Chobham RFC.  
We would be most grateful if you arrange to make payment for this as soon as possible.  
You can pay online using our [payment portal](#).  
If you have any queries please contact the club at your convenience.  
blackhole@first-sports.com  
+44 1483 762466  
Windsor Road

body | p

Selection Summary

Total Records Selected: 1

Recipient Summary

Total emails to be sent: 1  
Total recipients excluded: 0

Attachments

\* Attach Name: [ ] Select  
Subject (0/250): [ ] Upload

Dear Max Test,

Please be informed that you have an outstanding balance for your membership at Chobham RFC.

We would be most grateful if you arrange to make payment for this as soon as possible.

You can pay online using our [payment portal](#).

If you have any queries please contact the club at your convenience.

[blackhole@first-sports.com](mailto:blackhole@first-sports.com)  
+44 1483 762466  
Windsor Road  
Chobham  
Fowlers Wells  
Woking



### 3.2 Pay Now

The 'Order' has been confirmed and the individual will now appear in the **Membership Grid & Everyone** (based on the membership scheme duration, once the renewal date passes, the individuals will be removed from Membership and entered into Lapsed)

Print
Return

| Order Information          |   | Contact Details  |          |
|----------------------------|---|--|----------|
|                            | Social<br>General Social Member<br>Membership 1642923 | Qty: 1   | 0.00     |
| <b>Cost</b>                |   |  |          |
| Total                      |   |  | 0.00 GBP |
| <b>Payment Information</b> |   | <b>Club Details</b>  |          |
| 17/10/2014 - Free - Paid   |   | RugbyFirst Training RFC<br>Rugby House<br>Twickenham Stadium<br>200 Whitton Road<br>Twickenham<br>MIDDLESEX<br>ENGLAND<br>TW2 7BA<br><a href="mailto:test@test.com">test@test.com</a><br>+44 (0) 7545 921483 |          |
| Total Paid                 |   |  | 0.00 GBP |

New Member
Export

| Membership Type | First Name | Last Name | RFU Id  | Status | Renewal Date | Balance | Membership Number | Date Of Birth | Address | Phone | Filters |
|-----------------|------------|-----------|---------|--------|--------------|---------|-------------------|---------------|---------|-------|---------|
| Social          | Max        | Test      | 1804330 | Active | 14/07/2015   | 0.00    |                   | 09/01/1979    |         |       | Search  |

### 3.3 Pay Later

Upon selecting Pay Later the individual is inserted into the Pending grid. The Pending grid, outlines those individuals that have a balance outstanding at the club.

New Member
Export

| Membership Type               | First Name | Last Name | RFU Id  | Status  | Renewal Date | Balance | Membership Number | Date Of Birth | Address   | Phone | Filters |
|-------------------------------|------------|-----------|---------|---------|--------------|---------|-------------------|---------------|---|-------|---------|
| Adult Player (Non Registered) | Max        | Test      | 1591816 | Pending | 14/07/2015   | 5.00    |                   | 01/01/2000    | Holme Park Sonning Lane Reading Berkshire RG4 1 ... |       | Search  |

From Pending once the member has paid, the administrator can select the **outstanding balance**.

New Member
Export

| Membership Type               | First Name | Last Name | RFU Id  | Status  | Renewal Date | Balance | Membership Number | Date Of Birth | Address   | Phone | Filters |
|-------------------------------|------------|-----------|---------|---------|--------------|---------|-------------------|---------------|---|-------|---------|
| Adult Player (Non Registered) | Max        | Test      | 1591816 | Pending | 14/07/2015   | 5.00    |                   | 01/01/2000    | Holme Park Sonning Lane Reading Berkshire RG4 1 ... |       | Search  |

Select Pay Now

The outstanding balance has been settled and the member is now Active and will appear in the Membership and Everyone grids.

| Membership Type               | First Name | Last Name | RFU Id  | Status | Renewal Date | Balance | Membership Number | Date Of Birth | Address  | Phone |
|-------------------------------|------------|-----------|---------|--------|--------------|---------|-------------------|---------------|--|-------|
| Adult Player (Non Registered) | Max        | Test      | 1591816 | Active | 14/07/2015   | 0.00    |                   | 01/01/2000    | Holme Park Sonning Lane Reading Berkshire RG4 1... |       |

4. Creating a new Family Member

Select **New Member**

Select **Family** & the relevant Membership scheme

| Membership Type | First Name | Last Name           | RFU Id                | Status | Renewal Date | Balance    | Membership Number | Date Of Birth | Address     | Phone            |
|-----------------|------------|---------------------|-----------------------|--------|--------------|------------|-------------------|---------------|-------------|------------------|
| Family Test     | £10 Test   | Family Test product | £5 Before 31st August | Test   | Social       | £12 Social | Social product    | Test 123      | £5 Test 123 | Test 123 product |

Once the scheme has been selected it is now possible to add the individuals to the scheme. As it is a family membership, multiple individuals can be assigned to the scheme.

As per the individual sign up, there is the need to search for the individuals to see if they already exist at the club.

**Add Individuals**

**Social**

Social  
Social product  
Up to 2 adults.  
Up to 2 juniors.

Scheme details – How many individuals can be assigned to the scheme. i.e 2 x Adults & 2 x juniors

**Find people by name**

Title  First Name

\* Last Name

Members (0)

No individuals currently added to this membership

Once the search has been completed, either select the individual and continue or **‘Create New Individuals’**

**Add individuals** Next Create New Individual

**Social**

Social  
Social product  
Up to 2 adults.  
Up to 2 juniors.

**Find people by name**

Title  First Name

Mr  M

\* Last Name

Members (0)

No individuals currently added to this membership

- MR Maxwell Test (ID:1098807) T(0) 1 919 1122343 0009 January 1976  
200 Whitton Road Twickenham Middlesex KT14 7BU
- MR Max Test 1 (ID:1053059) E:mlord@first-sports.com 0009 January 1976  
Rugby House Rugby Roa Twickenham Middlesex TW1 1DZ  
Active family membership valid to 13/08/2015
- MR Max Test (ID:1591818) 0001 January 2000  
Holme Park Sornning Lane Reading Berkshire RG4 6DU
- MR Max Test (ID:1538182) 0009 January 2009  
8 Quakers Close Northampton Northamptonshire NN7 3NZ
- MR Max Test (ID:1599619) 0009 January 2000  
Duleries Community College Whinney Lane Newark Nottinghamshire NG22 9TD
- MR Max Test (ID:1447778) E:mburton@first-sports.com 0009 January 1976  
200 Whitton Road Twickenham Middlesex TW2 7BA
- MR Morony Test (ID:1592344)

Insert the details for the new individuals.

**Add Individual** Save Cancel

**Profile Picture**

Select

**Individual**

\* Title  \* First Name

Mr  M

Middle Names

\* Last Name

Test

Gender  \* Date Of Birth

**Contact Details**

Phone

Area Code  Extension

Local Number

Email

\* Email (0/200)

**Address**

Country  \* Postcode

Number  Building

\* Address

\* City  County

Once the individual has been entered, the system will then return to the search page. This enables the club to search for the other members that are associated to the family scheme.

Complete the search again and either select the existing individual or Create New

Member Details Cancel Place Order

Details

1 Members added to order

Family 2+1

£10.00 1 YEAR

Start Date 09 February 2015 Renewal Date 01 September 2015

Family 2+1  
2 Adults 1 Juniors

Find people by name

Title  
Mr

First Name  
Dad

\* Last Name  
Test

Search Clear

Mr Dad Test Edit Remove

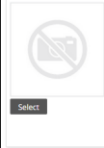
Date Of Birth 09/01/1979 Gender

Email mburton@first-sports.com Full Phone

Address  
200 Whitton Road  
Twickenham  
ENGLAND  
TW2 7BA

Complete the Personal details for the member (Address is auto populated)

Add Individual Save Cancel

 Select

\* Title Mr \* First Name Dad

Middle Names

Last Name Test

Gender \* Date Of Birth 09/01/1990

Contact Details

Phone  
Area Code Extension  
Local Number

Email \*Email (14/200)  
test@test.com

Address

Country UNITED KINGDOM \* Postcode TW2 7BA

Number Building

\* Address  
Whitton Road

\* City Twickenham \* County MIDDLESEX

Once the details have been entered the system will redirect to the search screen, however this time the system prompts the club to outline the relationship to primary and who is the primary member

Member Details Cancel Place Order

Details

2 Members added to order

Family 2+1

£10.00 1 YEAR

Start Date 09 February 2015 Renewal Date 01 September 2015

Family 2+1  
2 Adults 1 Juniors

Find people by name

Title  
Mr

First Name  
Mum

\* Last Name  
Test

Search Clear

Mr Dad Test Edit Remove

Primary Member

Date Of Birth 09/01/1979 Gender

Email mburton@first-sports.com Full Phone

Address  
200 Whitton Road  
Twickenham  
ENGLAND  
TW2 7BA

Mr Mum Test Edit Remove

Primary Member \* Relationship To Primary  
Wife

Date Of Birth 09/01/1979 Gender

Email mburton@first-sports.com Full Phone

Address  
Whitton Road  
Twickenham  
ENGLAND  
TW2 7BA

Continue this process until all the members are assigned. Select **Place Order**



Member Details Cancel Place Order

Details

3 Members added to order

Family 2+1

E10.00 1 YEAR

Start Date: 09 February 2015 Renewal Date: 09 September 2015

Family 2+1

2 Adults 1 Juniors

Mr Dad Test edit remove

Primary Member

Date of Birth: 09/01/1979 Gender:

Email: mburton@first-sports.com Full Phone:

Address: 208 Whitton Road, Twickenham, ENGLAND, TW2 7BA

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Mr Mum Test edit remove

Relationship to Primary:

Primary Member

Date of Birth: 09/01/1979 Gender:

Email: mburton@first-sports.com Full Phone:

Address: Whitton Road, Twickenham, ENGLAND, TW2 7BA

---

Mr Son Test edit remove

Relationship to Primary:

Primary Member

Date of Birth: 09/01/1979 Gender:

Email: mburton@first-sports.com Full Phone:

Address: Whitton Road, Twickenham, ENGLAND, TW2 7BA

The system will now load the Pay Now or Pay Later options (see above for examples)

Order Summary Cancel Pay Now Pay Later

Orders

Order: 40263711 | Dad Test | 10.00 GBP

|            |       |           |
|------------|-------|-----------|
| Family 2+1 | 10.00 | 10.00     |
| Qty: 1     |       |           |
| Sub Total  |       | 10.00 GBP |

Payment Method

Please check the order items and the final payment amount.

Click the pay button to continue to the payment gateway.

Online Card 
  Cash 
  Cheque 
  Other

The family Membership will be created and all three individuals will hold the same scheme and the relationships stated have been created

|            |     |      |  |  |  |   |   |
|------------|-----|------|--|--|--|---|---|
| Family 2+1 | Dad | Test |  |  |  | Husband of Mum Test (1828906), Parent of Son Te ... | ▼ |
| Family 2+1 | Mum | Test |  |  |  | Wife of Dad Test (1828906)                          | ▼ |
| Family 2+1 | Son | Test |  |  |  | Child of Dad Test (1828906)                         | ▼ |