

Microsoft Partner
Silver Application Development

FIRSTSPORTS

IRFU

Club House

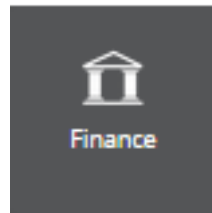
Creating a Membership Scheme(s)

Introduction

Membership Schemes are the foundations for the whole system. The schemes are what help determine your members, the status of your members, the amount paid, total members and

1. Creating a new scheme

To create a scheme, select **Finance**



Once loaded, select **Membership Schemes**

Existing Schemes will appear in the list

First Sports										Export	New
Name	Price	From	To	Instalments	Type	Duration	Period	Status	Filters		
✓ Social	£10	09/02/2015	31/12/9999	No	Adult	Years	1	Active			

Select **New**

First Sports										Export	New
Name	Price	From	To	Instalments	Type	Duration	Period	Status	Filters		
✓ Social	£10	09/02/2015	31/12/9999	No	Adult	Years	1	Active			

The Schemes details page is created

Scheme Details include:

1. Membership Details:

- Name – Manual Entry (Club Specific)
- Type
 - Adult – Single Membership Scheme (assigned to one member)
 - Junior – As Above
 - Individual – As Above
- Code – Default code entered by the system
- Status – Active (Current)/Inactive (not currently available)
- Available for Purchase Online – This will post the membership to the Clubs website (If they are using the FSI website available to create via GMS) Allowing existing and new members to sign up and buy their memberships online via the website
- Status on Purchase - Which grid and status does the individual hold once they sign up
 - Pending – Allocates the individual to the pending grid
 - Active – Individual automatically appears in the Membership grid

2. Duration:

- Duration – Years/Months/Lifetime (Never Expires)
- Unit – How many months, years?
- Renewal
 - Anniversary = Set a specific date for the scheme to expire and be renewed.
 - Month – Which month does it commence
 - Day – Which day does is start for the month
 - Join Date = The date the individuals are assigned the scheme, the scheme commences and renews based on the join date and length of scheme i.e. 1 year.

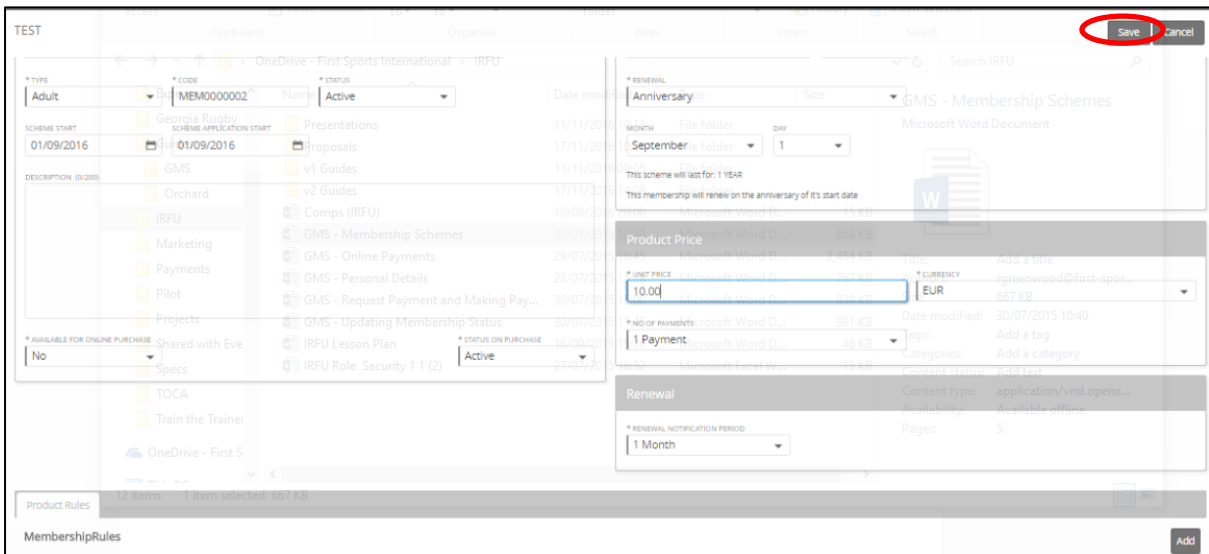
3. Price

- Effective From – The date the scheme commences. This defaults
- Effective To – If the scheme is only valid for a limited time then entering an effective too
- Currency – GBP
- Unit Price – How much does it cost. (0.00 if free)

4. Renewal

- Renewal Notification Period – How early can the individual be assigned the new membership type.

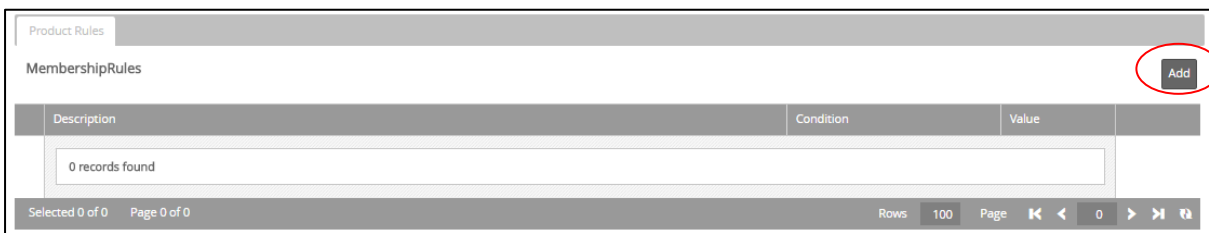
Once all the information has been populated, select **Save**



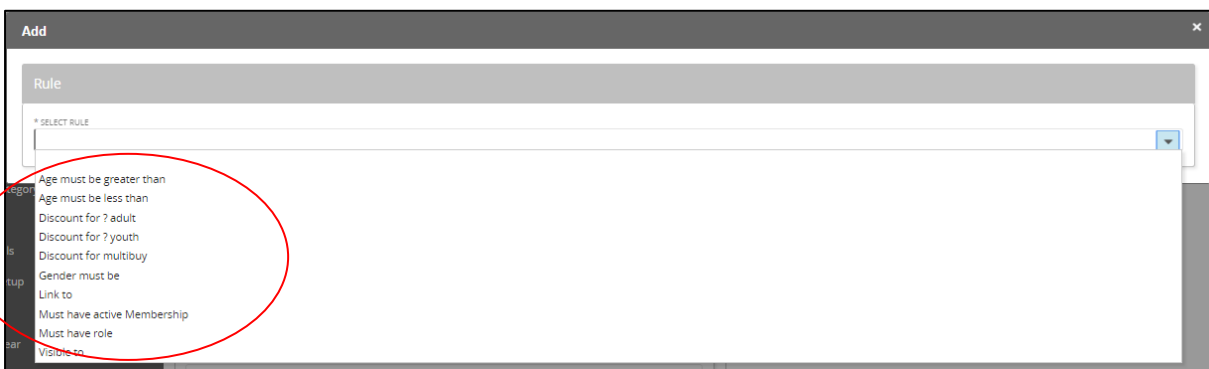
The Membership is then available to assign to both new and existing members or alternatively the members can sign in themselves and purchase the membership.

5. Applying Product Rules

To apply a Product Rule at the bottom of the membership scheme details, there is a tab called Product Rules, any existing rules will be listed. To create new, select Add.



Selecting Add displays a list of values that can be applied as product rules



These rules include:

- Age Must be greater than – An age is applied and a check is added to ensure the person is above the set age
- Age must be less than – As above, but the individuals must be below the age listed
- Discount for – Multi buy discount, if X number of schemes are purchased there is a discount of X
- Discount for additional members – If additional members are added, if X are added then apply a discount of X
- Gender must be – Male/Female
- Link to –
- Must have active Membership – Only available if they are an existing member
- Must have role – Select which roles the membership can be purchased by
- Visible to – Which individuals can see the membership to purchase

6. Applying Price Points

Once the membership scheme has been created it is possible to edit and add additional prices to the scheme. To add an additional price, select the scheme and edit.

Name	Price	From	To	No Of Paym...	Instalments	Type	Duration	Filters
test		11/08/2016	31/12/9999	1	No	Individual	Years	
test Scheme	10.00 EUR	17/11/2016	31/12/9999	1	No	Individual	Years	

Scrolling to the bottom of the scheme it is possible to see a tab labelled Price Points. This will display the initial price added when the scheme was first created. To add a new/additional price, select New

Price Points

Effective From	Effective To	Price	Currency Code
17/11/2016		10.00 EUR	EUR

A new screen will load displaying text boxes where details for the new prices can be entered. It is also possible to apply a date to the price, if the organisation or administrator only wants the price to be available for a set duration either to assign by the administrator or for the individual to sign up to themselves.

Test Scheme 0.00 EUR from 17/11/2016

* UNIT PRICE: 10.00 * CURRENCY: EUR

* EFFECTIVE FROM: 17/11/2016 EFFECTIVE TO: []

7. Removing Membership Schemes

To remove the membership scheme from being available to purchase, select the required membership scheme and edit.

TEST										Selected 1	Export	Edit
Name	Price	From	To	No Of Paym...	Instalments	Type	Duration	Filters				
<input type="checkbox"/> test		11/08/2016	31/12/9999	1	No	Individual	Years					
Test Scheme	10.00 EUR	17/11/2016	31/12/9999	1	No	Individual	Years					

The membership details screen will load, from here the administrator will need to set the scheme to inactive and save the changes

TEST > Test Scheme Save Cancel

Membership Details

* NAME (11/200) Test Scheme

* TYPE Individual * CODE MEM0000001 * STATUS **Active**

Scheme Start: 01/09/2016 Scheme Application Start: 01/09/2016

DESCRIPTION (11/200) Test Scheme

* AVAILABLE FOR ONLINE PURCHASE No * STATUS ON PURCHASE Active

Duration

* DURATION Years * UNIT 1

* RENEWAL Anniversary

MONTH: September DAY: 1

This scheme will last for: 1 YEAR
This membership will renew on the anniversary of it's start date

Product Price

* UNIT PRICE 10.00 * CURRENCY EUR

* NO OF PAYMENTS 1 Payment

Once saved and returning to the list of schemes the, scheme that was set to inactive is no longer available. It is important to note that from this point on no one will be able to be assigned or purchase this membership scheme. Existing members assigned to this membership will remain until the currently membership expires (this is the duration remaining)

TEST										Export	New
Name	Price	From	To	No Of Paym...	Instalments	Type	Duration	Filters			
<input type="checkbox"/> test		11/08/2016	31/12/9999	1	No	Individual	Years				

The membership has been removed from the list of active schemes, to find the inactive schemes, select the filter, and set the Status search to inactive, followed by Search

TEST												Export	New
Name	Price	From	To	No Of Paym...	Instalments	Type	Duration	Period	Status	Start Date	Application ...	Filters	
<input type="checkbox"/>		11/08/2016	31/12/9999	1	No	Individual	Years	1	Active Inactive	01/01/2016	11/08/2016	Clear Search	