Microsoft Partner

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

	Home	••• Home		:
<	Membership Schemes	TEST		Refresh
	Payments			
	Orders	Orders N	Collection Failures	0
	Product Category			
	Products	Orders Outstanding Amount	Direct Debit	Credit Card
	Bank Details	10.00 EUR	0.00 EUR	0.00 EUR
	Account Setup	Last Updated 17/11/2016 14:09		Last Updated 17/11/2016 14:09

Existing Schemes will appear in the list



Select New

First Sports								Expo (New	
✓ Name									▼ Filters
Social		£10 09/02/2015	31/12/9999	No	Adult	Years		1 Active	

FIRSTSPORTS

The Schemes details page is created

First Sports			Create Cancel
Membership Details			Duration
* Name (0/200) * Type Adult Description (0/200)	* Code • MEM0000001	* Status Active	*Data *Unit Years I (1 YEAR) *Enrowal ANN/RSY description. Investigation Month Day I January I ▼
* Available for online purchase		*Status on purchase	Price Effective From Effective From (\$30220315) (************************************
Yes	-	Pending -	Renewal * Increase Nacification Period 1 Month V

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.

TEST			Toraci				Save
* TYPE Adult	*cope	*status Name Active	Date modif	* RENEWAL		GMS - Merr	
SCHEME START	Georgia Rugby SCHEME APPLICATION START	Presentations	11/11/2016	10400000 File folder	1 •		
DESCRIPTION (0/200)	GMS Orchard IRFU Marketing	v1 Guides v2 Guides Comps (IRFU)	11/11/2016 17/11/2016 10/08/2016 30/07/2015	This scheme will last for: 1 YEAR This membership will renew on the anni	versary of its start date)	w	
* AVAILABLE FOR ONLINE F	Payments Pilot Projects Shared with Eve	GMS - Online Payments GMS - Personal Details GMS - Request Payment and Making Pay GMS - Updating Membership Status IRFU Lesson Plan Active	29/07/2015 28/07/2015 30/07/2015 30/07/2015 16/09/2015	*UNIT PRICE) 2,484 KB) 767 KB) 839 KB) 391 KB) 46 KB	Title EUR Date modified: ags: Categories:	Add a title rgreanwood@first-spor 667 KB 30/07/2015 10:40 Add a tag Add a category
			21/01/20	Renewal	(13 ND	Content status: Content type:	Add text application/vnd.openx
				* RENEWAL NOTIFICATION PERIOD	•	Pages:	5
Product Rules	12 items 1 item selected 60	17 KB	-				

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.

Product Rules			
MembershipRules			Add
Description	Condition	Value	
0 records found			
Selected 0 of 0 Page 0 of 0	Rows 100 Pag	je K K O	> > ø

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

	Add		×
	Rule		
	* SELECT RULE	-	1
/	Age must be greater than Age must be less than		i T
(Discount for ? adult Discount for ? youth Discount for multibuy		
\langle	tup Gender must be Link to Must have active Membership		
	Must have role Visitions 42		

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.

ſ	TEST								Selected 1 Export	Edit
	 Name 	\$	Price	From	То	No Of Paym	Instalments	Туре	Duration	▼ Filters
	test			11/08/2016	31/12/9999	1	No	Individual	Years	
	Test Sch		10.00 EUR							

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

	elected 0 of 1 Page 1 of 1 Rows									
17/11/2016			10.00 EUR	EUR				<		
Prices	Price Points Product Rules Money stays in the game No need to spend on commercial providers.									
Price Points Product Bulles	ultim grass • Accu inves the c	sately having more concise, accurate dat sroots rugby as a whole. rate growth and participation data allow stment through Sport England. This mon community game.	a could lead the mean nonecond period of the second							

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		Save Can	cel
* UNIT PRICE	* CURRENCY EUR		•
* EFFECTIVE FROM 17/11/2016	8	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 Ex or	t Edit
▼ Name 🗢	Price	То	No Of Paym	Instalments	Туре	Duration	▼ Filters
 □ te							
Carl rest Scheme	10.00 EUR						

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	Duration
* NAME (11200) Test Scheme * TYPE * CODE * CODE * STATUS Active Active Active Active Active Individual O1/09/2016 O1/09/2016	* DURATION *UNIT Years *UNIT 1 *UNIT Anniversary MONITH DAY September 1 *UNIT
DESCRIPTION (11200) Test Scheme	This scheme will last for: 1 YEAR This membership will renew on the anniversary of it's start date Product Price
* ANALABLE FOR ONLINE PURCHASE No	* UNIT FRICE * CURRENCY [10.00 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 🗢								▼ Filters
test 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