

Microsoft Partner
Silver Application Development

FIRSTSPORTS

IRFU

Clubhouse

Personal Details

Introduction

Personal details brings together all the information that has been entered onto the system about the individual that is logged in.

Personal Details is a logged in view of the user.

Potentially every individual can have access to Personal Details. If the individual is created and assigned to an organisation, that individual can be sent their log in details and at the very least, access the Personal Details tile and start managing their own details.

If the individual only has a log in for the system and no admin role assigned to them, they will not be able to access anything else but Personal Details.

The Personal Details module contains:

1. Summary

The summary page is a non-editable breakdown of the pertinent information that is loaded onto the system, essentially the individual's profile.

1.1 Buying Memberships

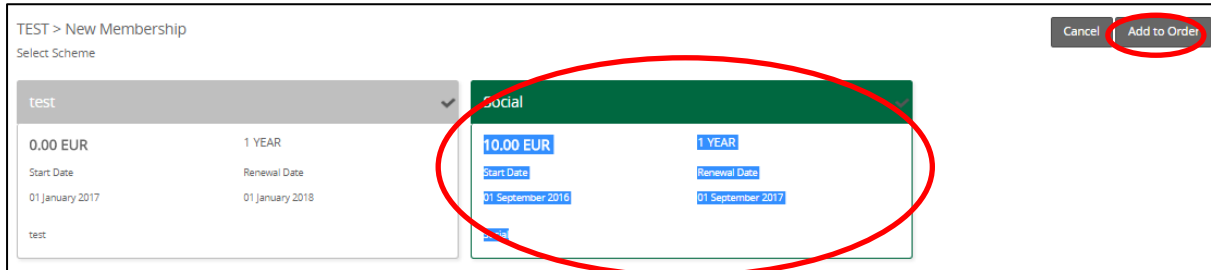
One area that is editable or selectable is **"Buy Membership"** If the club that is set up for online payments, members can log into the system and select Buy Membership and be presented with a list of memberships and products that the individual can purchase for themselves and linked individuals and pay for these online (Cards & Direct Debits)

The screenshot shows the IRFU Personal Details page for a user named Max Test. The page is divided into several sections:

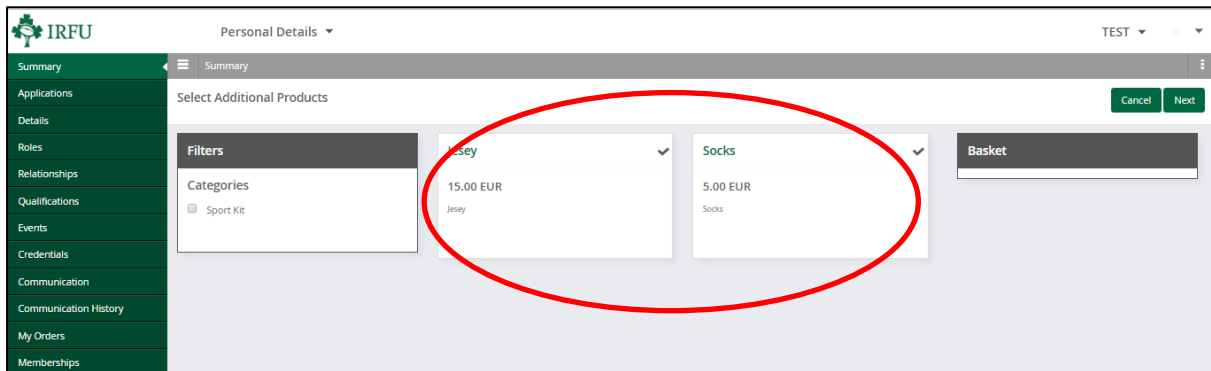
- Header:** IRFU logo, "Personal Details" dropdown, and "TEST" user name.
- Summary Card:** Max Test, IRFU ID: 16795101, and a "Buy Membership" button circled in red.
- Summary Section:** Includes fields for "KNOWN AS" (mburton@first-sports.com), "DATE OF BIRTH" (01/01/1900), "GENDER", "EXTERNAL REF", "MARITAL STATUS", and "DISABILITY".
- Status Section:** Shows "Status" as Active, "Created" on 11 November 2016, and "Date Associated" on 11 November 2016.
- Memberships Section:** Shows a pending membership for "test" from 01/01/2017 to 01/01/2018.
- Activity Section:** Shows "Membership Secretary (Active)" with "at: TEST" and "from: 11/11/2016".
- Orders Section:** Shows a pending order with "Reference: 1980", "Date: 11/11/2016 08:41", "Due: 11/11/2016 08:41", and "Amount: 0.00".

Selecting the buy membership will direct the user to a list of memberships that can be purchased.

The screen will load memberships that are applicable to that individual i.e. you can only buy a membership for an over 18 member if you are over 18. This is dependant on the rules that the club have assigned to the schemes. Select the applicable membership scheme, followed by **Add to Order**

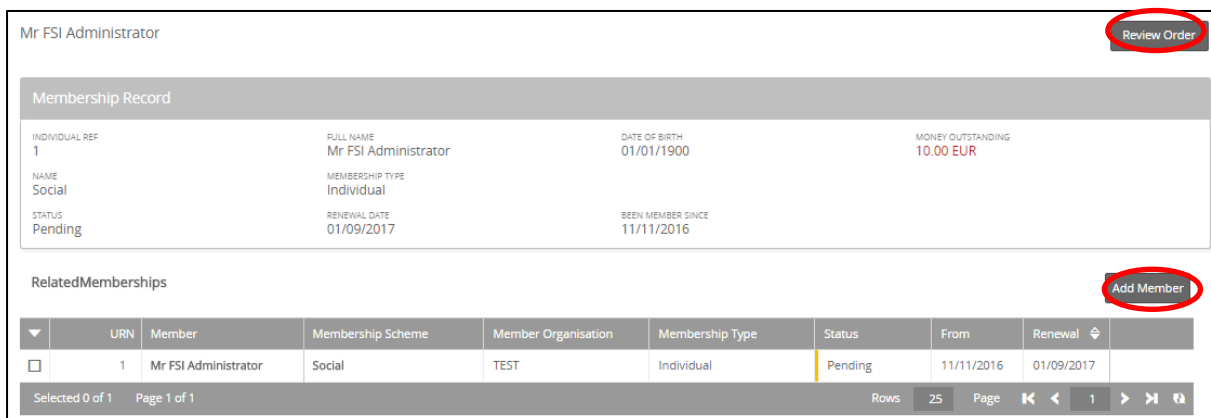


The member can choose to add a product to purchase with the membership



The Review Membership Screen appears, if the process is complete i.e. no further memberships need to be added, select **Review Order** to pay for the membership

Alternatively if other memberships need to be purchased i.e. a sibling or child membership, select **Add Member**



Selecting **Add Member** will display a list of individuals that are already linked to this record by relationship (a child, wife, and partner)

1.2 Adding additional Members

Adding Memberships to existing relationships

If the membership is to be purchased for an existing individual that is linked by relationship, select the tick box next to the name, followed by Buy Membership, this will then loop back to the membership tile screen mentioned above where a membership type can be selected (note if a relationship does not exist then the member will either have to ask the club to add the relationship)

Felix Cat								
IRFU ID	Description	Date of Birth	Relationship	Valid from	Valid to	Comments	Filters	
<input type="checkbox"/>	15742637	Jack Samurai is the Child of Felix Cat	02/02/2000	Child	11/11/2016	Added by FSI Administrator on 1 ...	<	
<input type="checkbox"/>	15742638	Cheshire Cat is the Child of Felix Cat	14/02/2000	Child	11/11/2016	Added by FSI Administrator on 1 ...	<	

1.3 Adding Memberships to New Individuals

If the existing relationships are not in place then it is possible to Add a new Adult or Youth.

Felix Cat								
IRFU ID	Description	Date of Birth	Relationship	Valid from	Valid to	Comments	Filters	
<input type="checkbox"/>	15742637	Jack Samurai is the Child of Felix Cat	02/02/2000	Child	11/11/2016	Added by FSI Administrator on 1 ...	<	

Once selected, the member should enter the personal and contact details for the new member, followed by **Next**

Please add information for Adult 2

How is this person related to you?

* RELATIONSHIP TO YOU

Personal details

TITLE

* FIRST NAME

* LAST NAME

* EMAIL (E/200)

* DATE OF BIRTH

* GENDER

Contact Details

Home Phone

COUNTRY CODE AREA CODE LOCAL NUMBER

Mobile Phone

COUNTRY CODE AREA CODE LOCAL NUMBER (M/20)

Address

BUILDING (B/20)

NUMBER (N/20) * ADDRESS (A/20)

* CITY (C/20)

POSTAL CODE

Once entered, the relationship list refreshes, displaying the new contact that has just been created. Select the tick box next to the individuals name that requires a membership to be assigned, followed by **Buy Membership**

Felix Cat								Delete	Buy Membership
IRFU ID	Description	Date of Birth	Relationship	Valid from	Valid to	Comments	Filters		
<input type="checkbox"/>	15742637	Jack Samurai is the Child of Felix Cat	02/02/2000	Child	11/11/2016	Added by FSI Administrator on 1 ...	<		
<input checked="" type="checkbox"/>	15742638	Cheshire Cat is the Child of Felix Cat	14/02/2000	Child	11/11/2016	Added by FSI Administrator on 1 ...	<		

Select the applicable scheme, followed by **Add to Order**

TEST > New Membership

Select Scheme

test	10.00 EUR	1 YEAR
Start Date	Renewal Date	
01 January 2017	01 January 2018	

Social

10.00 EUR 1 YEAR

Start Date: 01 September 2016 | Renewal Date: 01 September 2017

Cancel

Cancel Add to Order

Once added, the page will redirect to display the individuals that have been bundled together into the membership purchase, in this case there are now two. From here it would be possible to add additional members (either existing or new) by selecting add member and following the process demonstrated above.

Alternatively, select **Review Order** to pay

Mr FSI Administrator

Review Order

Membership Record

INDIVIDUAL REF	FULL NAME	DATE OF BIRTH	MONEY OUTSTANDING
1	Mr FSI Administrator	01/01/1900	10.00 EUR
NAME	MEMBERSHIP TYPE		
Social	Individual		
STATUS	RENEWAL DATE	BEEN MEMBER SINCE	
Pending	01/09/2017	11/11/2016	

RelatedMemberships

Add Member

URN	Member	Membership Scheme	Member Organisation	Membership Type	Status	From	Renewal
<input type="checkbox"/>	1 Mr FSI Administrator	Social	TEST	Individual	Pending	11/11/2016	01/09/2017

Selected 0 of 1 Page 1 of 1

Rows: 25 Page: 1

1.4 Paying for the Orders

Reviewing the order will list all the outstanding orders (for memberships, in this case 2). Dependant on how the club have set up the memberships, the user can select how to pay, followed by **Pay Now**

Once Pay Now has been selected, dependant on the payment method selected, you will either be directed to a credit card screen or direct debit mandate screen

Once the payment details have been entered and the payment has been successful, then an email will be triggered containing a receipt.

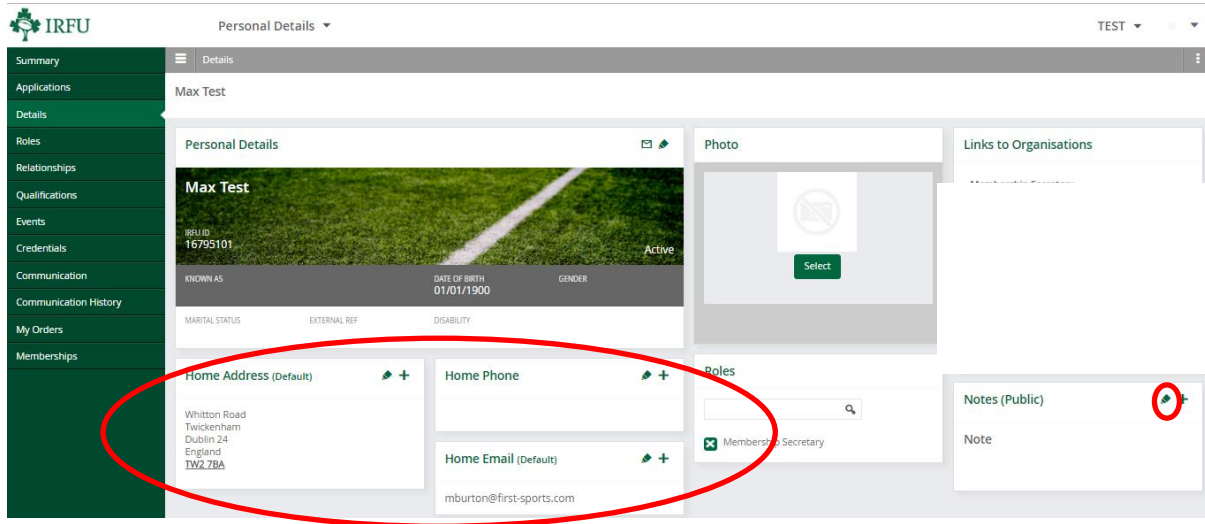
2. Applications

Applications lists all the organisations that the individual has applied to become affiliated to and the status of the application

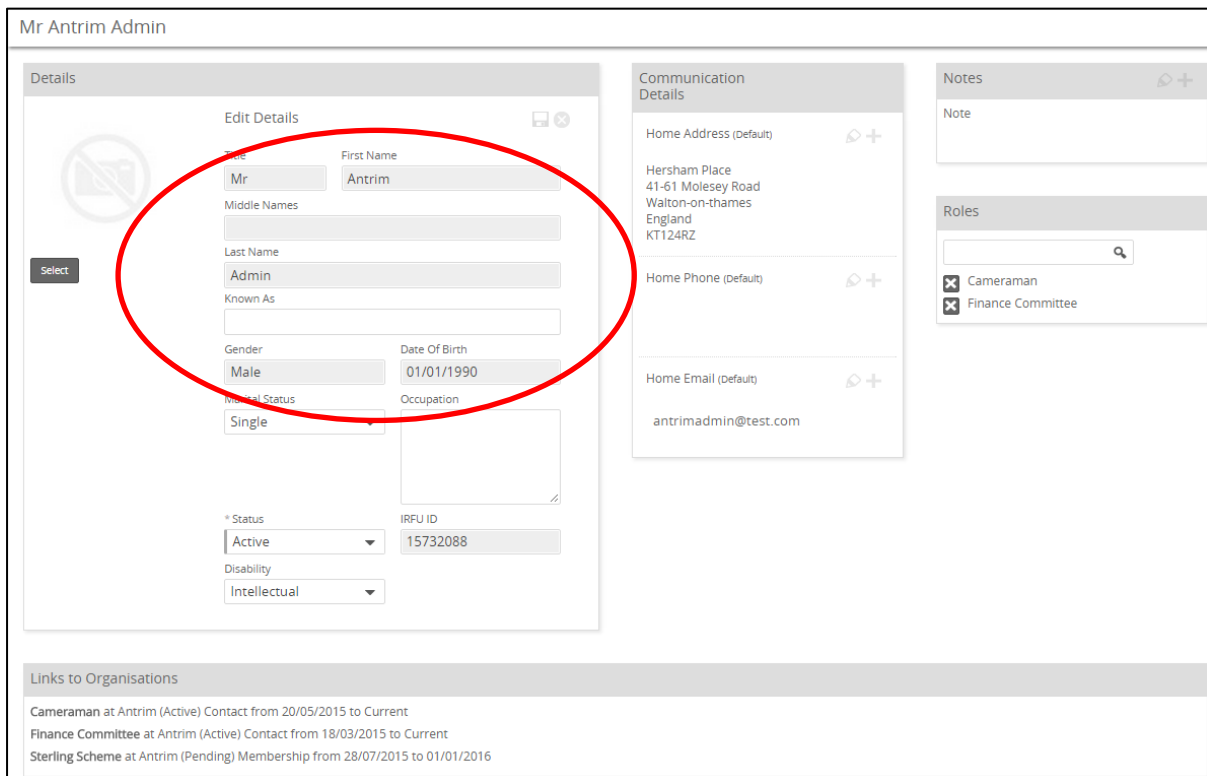
Organisation	Ind Ref	First Name	Last Name	Status	Type	Notes	Filters
Abroad	16795101	Max	Test	Pending	Coach		
TEST	16795101	Max	Test	Approved	Coach		

3. Details

Details allows the individual to update and amend their personal and contact details. Amendable details are the areas where a greyed out pencil appears. Selecting the Pencil enables the user to enter new details.



Individuals that are players are unable to edit/update their Title/First Name/Surname/Gender/DOB, This can only be completed by a Branch user or an IRFU administrator. This is not a club administrator permission.



4. Roles (Read Only)

Roles lists all the active roles that the individual has assigned to them.

Mr Antrim Admin										Export
RoleName	Category	Sub Category	Organisation	Status	Full Address	Phone	E-mail	Filters		
?				Is One of				Clear		
				Active				Search		
✓ Finance Committee			Antrim	Active						
✓ Cameraman			Antrim	Active						
✓ Finance Committee			Antrim Mini	Active						

5. Relationships

Relationships displays any existing relationships that exist between that individual and any other individual in the system. These relationships can be created in various ways, including:

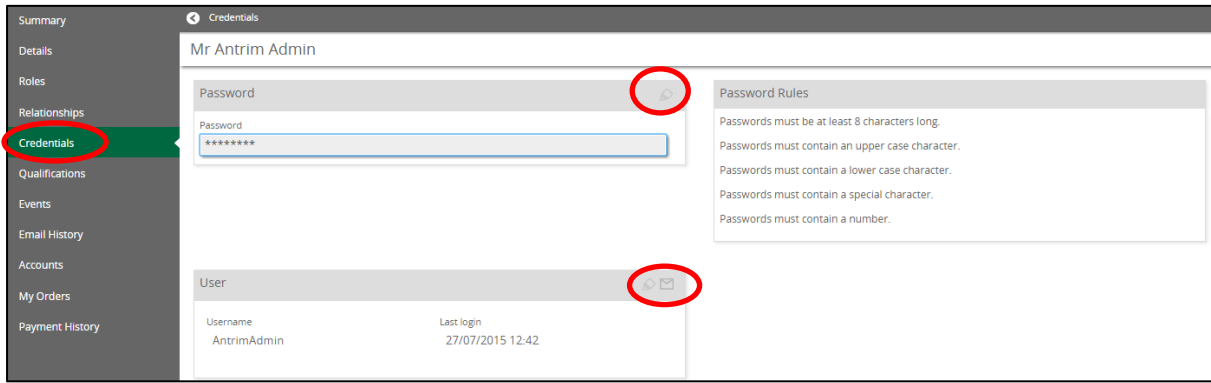
- **Player Registration** – When a Youth Player is entered, there is a choice to enter parent’s details. Once the parent is entered a relationship is created. The new player and the parent(s) appear in GMS as “Non Members” the relationship has been created.
- **Family Memberships** – When assigning multiple individuals to a Family Membership, the system asks what the relationship is between those members. Once the relationship has been entered at the point of assigning the membership, then this will be viewable from Personal Details.
- **Add Relationships (Manual)** – It is also possible to create relationship manually from GMS. To do this, two individuals must be selected, followed by “More” and “Add Relationship” this allows relationships between the pair to be added

Mr Antrim Admin							Export
ID	Description	Date of Birth	Relationship	Valid from	Valid to	Comments	
15732080	Antrim board is the Husband of Antrim Admin	01/01/1990	Husband	28/07/2015		Added by Antrim Admin on 28/07/2015	

It is also possible to select the IRFU ID and drill through to the details for the individual associated to the user.

6. Credentials

Credentials allows the users to change their username and/or password for the system by selecting the Pencil against either of those options:



7. Qualifications

Qualifications lists any individuals IRFU qualifications that they have obtained

Antrim											Export
Qualifications	Level	Category	Awarding Body	Status	Awarded	Expiry	Certificate Generated	Certificate Posted	Certificate Emailed	Filters	
Foundation (STAGE 2)	Stage 2	Coach	Irish Rugby Football Union	Active	01/12/2010						

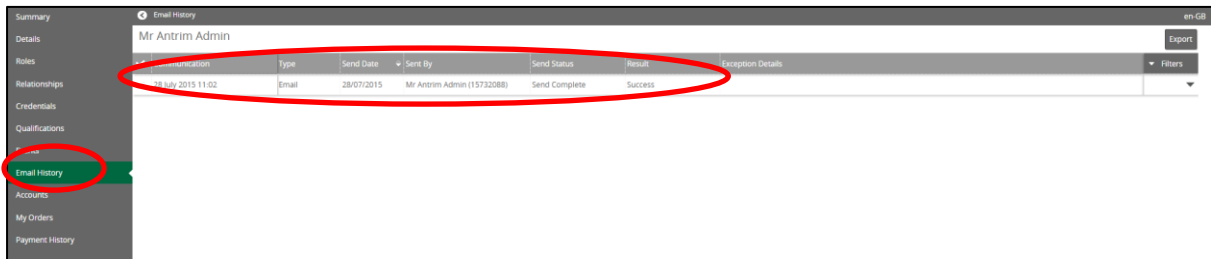
8. Events

Events, lists all the upcoming courses an individual has booked on to attend.

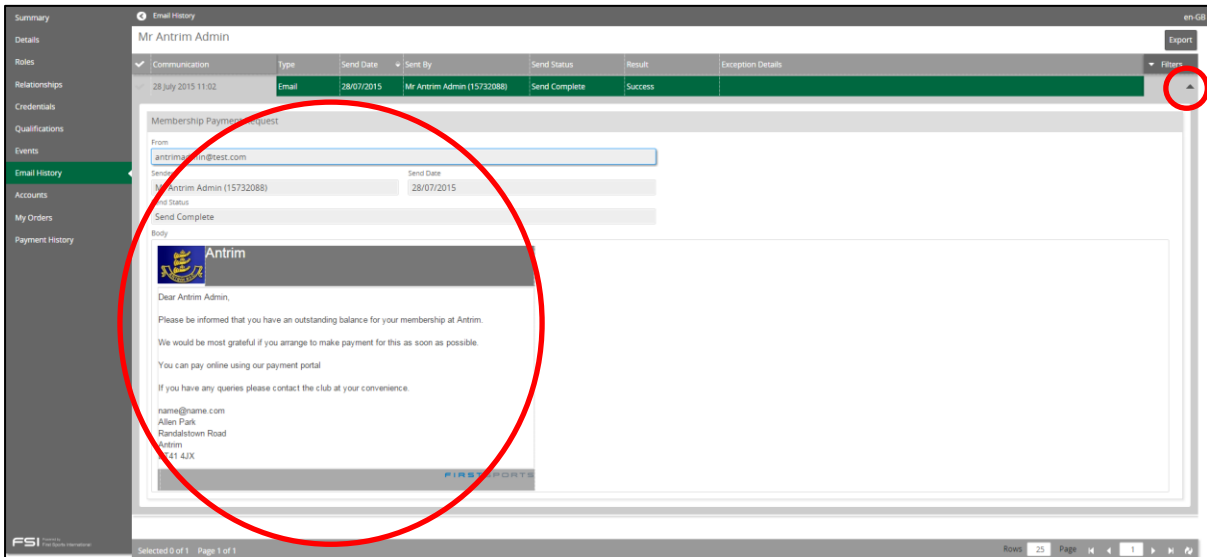
Antrim >														Export
Event Name	Event Code	Event Status	Type	Category	Start Date	Organiser	Attendance Status	Order Ref	Transaction Code	Transaction Date	Transaction Amount	Payment Method	Paid	Filters
Part Attendance	UPA-157	Approved	Course	Coaching	20/06/2015	Ulster Admin (157: ...	Registered	99341438	32277608	28/07/2015	700.00 EUR	Cash	Paid	

9. Email History

It is possible (as an administrator) to send emails from GMS. Whilst it isn't a mailbox and won't replace the need for an email client, GMS will facilitate the sending of emails, the recipient will see the email address as e.g. jbloggs@hotmail.com. Emails are sent to the email address registered against that individual and will appear in their inbox. Email History provides another audit trail and will list all emails that have been sent via GMS to that individual

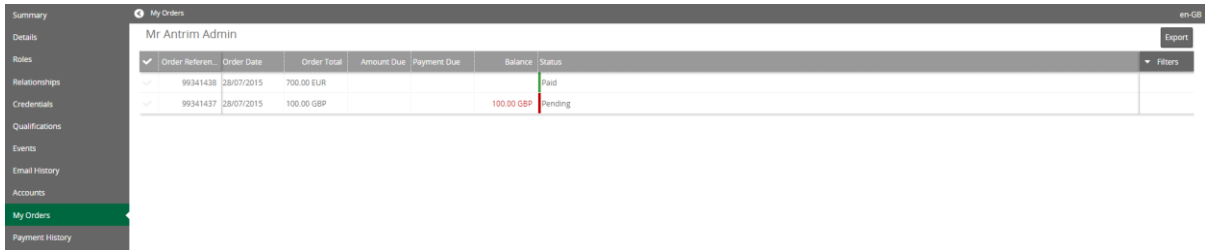


It is also possible to expand on the email to see the content

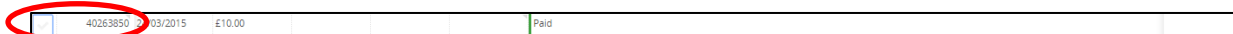


10. Orders

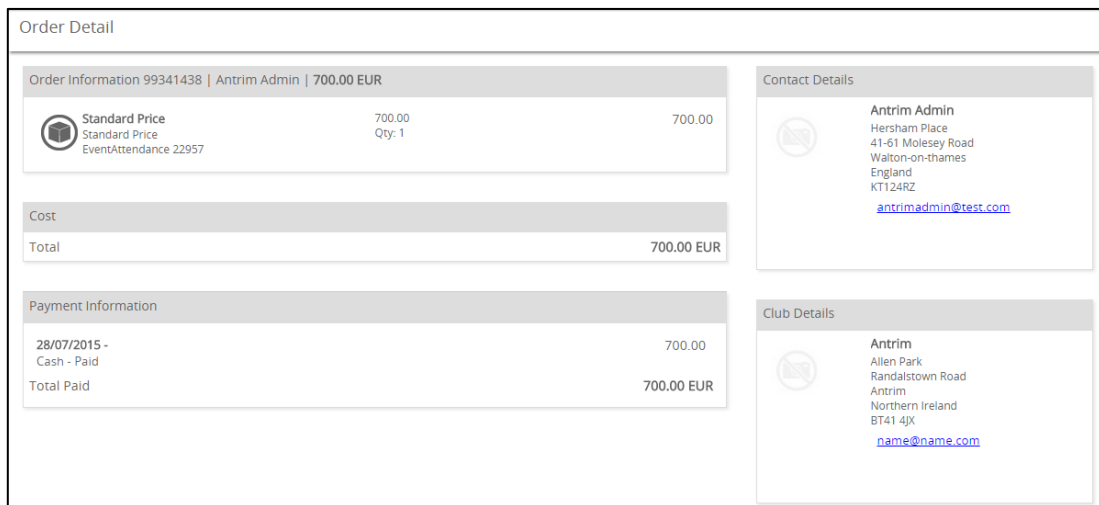
Orders brings together all the orders that have been assigned to the user for Membership Schemes, products etc and whether they are paid for or still owe money for them.



Selecting the Order Reference will display the order details



It displays the details relating to that order



If a tick is added against the order, options including pay and view receipt are available to the user.

The screenshot shows a table of orders for 'Mr Max Test'. The table has columns for Order Reference, Order Date, Order Total, Amount Due, Payment Due, Balance, and Status. The first row is selected, and a red circle highlights the 'Selected 1' button in the top right corner. Other buttons like 'Export', 'Pay', and 'View Receipt' are also visible.

Order Reference	Order Date	Order Total	Amount Due	Payment Due	Balance	Status
40263906	08/04/2015	£10.00	£10.00	08/04/2015	£10.00	In Progress
40263850	24/03/2015	£10.00				Paid
40263765	18/02/2015	£12.10				Paid
40263676	06/02/2015	£10.60				Paid
40263736	13/02/2015	£10.30				Paid
40263573	29/01/2015					Paid
40263534	15/01/2015					Paid

10.1 New Orders

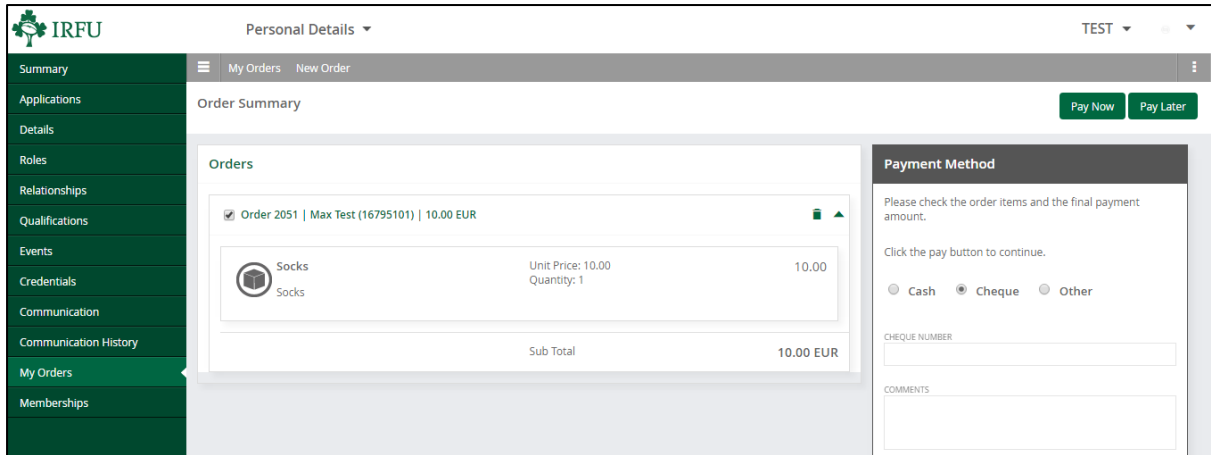
If the organisation are set up to take online payments then the individual can purchase products outside of the membership purchase process. To buy a product, select New Order

The screenshot shows the 'Personal Details' page for 'Max Test'. A green 'New Order' button is circled in red in the top right corner. The page includes a sidebar with navigation options like Summary, Applications, Details, Roles, Relationships, and Qualifications.

Following this the system presents the products that are available to purchase without a membership linked to it.

The screenshot shows the 'Select Additional Products' screen. It features a 'Filters' section with 'Sport Kit' selected, and two product cards: 'Jersey' for 15.00 EUR and 'Socks' for 5.00 EUR. A 'Basket' section is also visible on the right. 'Cancel' and 'Next' buttons are at the top right.

The individual can then pay for the item



11. Memberships

Memberships displays a list of old and new memberships that the individual has been associated to at various organisations. It lists the status of these memberships, if any money is outstanding and also give the member another opportunity to purchase their membership

