Microsoft Partner

# 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)

💠 IRFU	Personal Details 🔻		TEST 👻 🔍
Summary	E Summary		
Applications	Max Test		
Details		A REAL PROPERTY OF A REAL PROPER	
Roles	IRFU ID 16795101		and the First of
Relationships	10/2010	New Proventier States	Active
Qualifications	Summary	Buy Membership	Rues >
Events	INIONN AS mburten@first-sports.com	Status	
Credentials	Whitton Road	5161(3)	Membership Secretary (Active)
Communication	01/01/1900 Dublin 24	Status Active Created 11 November 2016	at: TEST from: 11/11/2016
Communication History	GENDER England TW2.78A	Date Associated 11 November 2016	THE THINK OF
My Orders		Membershins	Activity
Memberships	EXTERINAL REP NORMAL STATUS DISABILITY	Weinberanipa P	
		test (Pending)	USERNAME LAST LOGIN 16795101 08/12/2016 10:50
		at: TEST	
		from: 01/01/2017 to: 01/01/2018	a dua
			Orders >
			Reference: 1980 (Pending) Date: 11/11/2016/08:41 Due: 11/11/2016/08:41 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 dependent on the rules that the club have assigned to the schemes. Select the applicable membership scheme, followed by **Add to Order** 

TEST > New Membership Select Scheme						Cancel Add to Order
test		~	Social		~	
0.00 EUR	1 YEAR		10.00 EUR	1 YEAR		
Start Date	Renewal Date		Start Date	Renewal Date		
01 January 2017	01 January 2018	- N	01 September 2016	01 September 2017		
test						

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** 

N	Ir FSI Admi	nistra	tor								Review Order
	INDIVIDUAL REF 1		RULL NAME Mr FSI Administrator	Inistrator 01/01/1		of Birth Money of 10.00 E		DNEY OUTSTANDING			
	NAME Social		MEMBERSHIP TYPE								
	status Pending		RENEWAL DATE 01/09/2017	BEEN MEMBER SINCE 11/11/2016							
	RelatedMemberships										Add Member
	-	URN	Member	Membership Scheme	Member Organisation	Membership Type	Status		From	Renewal 🔶	
_		1	Mr FSI Administrator	Social	TEST	Individual	Pendi	ng	11/11/2016	01/09/2017	
	Selected 0 of	f1 P	age 1 of 1					Rows	25 Page	K < 1	≻ × ø

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 Delete Buy Member									nbership
	<	IRFU ID	Description	Date of Birth	Relationship	Valid from	Valid to	Comments	▼ Filters
[		15742637	Jack Samurai is the Child of Felix Cat	02/02/2000	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 Add Adult Register Child Let								Return
-			Date of Birth	Relationship				▼ Filters
	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	All Unread by	ategories * Z to A 4	En 17/1/2016 11:13
* RELATIONSHIP TO YOU			GMS <noreply@first-sport< td=""></noreply@first-sport<>
			· ·
Personal details			
TITLE			In Cheve Creation
		•	
* FIRST NAME			
A - ANT ANALYS			
LAST NAME			
* EMAIL (0/200)			
* DATE OF BIRTH		* GENDER	
			-
Contact Details	and (none)		TEST
Home Phone			
COUNTRY CODE	AREA CODE LOCAL NUMBER		
Mobile Phone			
COUNTRY CODE	AREA CODE LOCAL NUMBER (0/90	0	
Address			
BUILDING (0/70)			
NUMBER (0/50)	* ADDRESS1 (15/70)		
	cartoon village		
* CITY (0/20)			
History			
			from me iog in page and by tomowing in
POSTAL CODE			
			٩.

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** 

Fe	Felix Cat Delete Buy Membership								
-			Date of Birth	Relationship				▼ Filters	
	15742637	Jack Samurai is the Child of Felix Cat	02/02/2000	Child	11/11/2016		Added by FSI Administrator on 1°	<	
	<u>15742638</u>						Added by FSI Administrator on 1°		

# Select the applicable scheme, followed by Add to Order

TEST > New Membershi Select Scheme	р			Cancel Add to
test		social	~	
0.00 EUR	1 YEAR	10.00 EUR	1 YEAR	]
Start Date	Renewal Date	Start Date	Renewal Date	
01 January 2017	01 January 2018	01 September 2016	01 September 2017	
test		Sec.a		

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.

INDIVIDUAL REF	PULL NAME Mr FSI Administrator	DATE 01/	OF BIRTH		MONEY OUTSTANDING	
NAME Social	MEMBERSHIP TYPE Individual				10.00 2011	
status Pending	RENEWAL DATE 01/09/2017	BEEN 11/	MEMBER SINCE 11/2016			
RelatedMemberships						Add Me
UKN Member	Membership Scheme	Member Organisation	Membership Type	Status	From	Renewal

Alternatively, select **Review Order** to pay

## 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** 

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			Pay Now
		Payment Method	
	1 A	Please check the order items and the continue to	the final payment amount.
Unit Price: 120.00 Quantity: 1	120.00	<ul> <li>Direct Debit</li> <li>Online 0</li> </ul>	and
Unit Price: 120.00 Quantity: 1	120.00	* RIST NAME New	* LAST NAME Member
Sub Total	240.00 (	mburton@first-sports.com	NUMBER (355)
		* ADDRESSI (12/70) Whitton Road	200
		* OTV (1070) Twickenham courry MIDDLESEX	•
		* POSTCODE TW2 7BA * COUNTRY UNITED KINGDOM	۹.
	Unit Price: 12000 Quantity: 1 Unit Price: 12000 Quantity: 1 Sub Total	Luis Pres 12200 Querrig 1 1200 Uni Prise 12000 Querrig 1 12000 So Toal 2000 5	Unit Pres: 122.00 Quenty: 1       120.00         Usis Pres: 122.00 Quenty: 1       120.00         Usis Pres: 123.00 Quenty: 1       120.00         Sub Total       240.00 of chilling         *contrait regime       *contrait regime         White new regime       *contrait         White

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

Payment de	etails 🚟 🚟 🔐	Details	
Only Visa and Mas	terCard card payments accepted FSD-C-032675	Account Name New Member	Address 200 Whitton Road Twickenham GB TW7 7B4
Amount: Card Number:	240.00 GBP	* Account Number	
Expiry Date: (MMYYYY)	01 • / 2016 •	* Sort Code	
CVV / CVC Number:		I am the account holder and the c account.	inly person required to authorise debits or
Issue Number: (if available)		By confirming you are pre-authori Terms and Conditions.	sing payments to First Sports and agre
If your card is identifie Program (3D Secure) identification. After co back to this site to cor	ed as being enrolled in the Authenticated Payments ), you will be forwarded to your Card Issuer's website for mpletion of the verification process, you will be directed mplete the payment process.	Continue	
Please click the 'Make being made.	Payment' button only once to avoid multiple payments Make Payment	Your payments are protected by th <u>Direct Debit Guarantee.</u> Hersham Place Technology Park	
Powered by FSI	Verifiedry MasterCard VISA SecureCard	Stering Building Walton-On-Thames Surrey KT12.4RZ info@first-sports.com	

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

💠 IRFU		Personal Details	•						TEST 🔻	. •
Summary		Applications								1
Applications	м	ax Test								Export
Details		0	lad Def	First Name	Last Name	Charles II	7	Neter	_	T Citore
Roles		Organisation	16705101	Hist Name	Last Name	Bradian	Type	Notes		▼ Filters
Relationships		Abroad	16795101	Max	Test	Pending	Coach			
Qualifications		TEST	16/35101	Mdx	Test	Approved	Coach			
Events										
Credentials										
Communication										
Communication History										
My Orders										
Memberships										

# 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.

Mr Antrim Admin					
Details			Communication Details	Notes	
Sect	Edit Details	Aame rim Date Of Birth 01/01/1990 Occupation	Home Address (befault) Hersham Place 41-61 Molesey Road Walton-on-thames England KT124RZ Home Phone (befault) Home Email (befault) antrimadmin@test.com	Note Roles Cameraman Finance Committee	
Links to Organisations	* Status Active Disability Intellectual	//////////////////////////////////////			
Cameraman at Antrim (Act Finance Committee at Ant Sterling Scheme at Antrim	tive) Contact from 20/05/2015 to C rim (Active) Contact from 18/03/20 (Pending) Membership from 28/0	urrent 15 to Current 7/2015 to 01/01/2016			

# 4. Roles (Read Only)

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

N	1r Antrim Admin						Export
~	RoleName						▼ Filters
3					Is One of		🛚 Clear
Ð	· ·	-	-		Active 👻		Ø Search
							J. Jeanen
~	Finance Committee			Antrim	Active		•
~	Cameraman			Antrim	Active		-
$\geq$	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
	Pescription				Comments	▼ Filters
C	15732080 Antrim oord 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:

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Summary	Credentials
Details	Mr Antrim Admin
Roles	Password Password Rules
Relationships	Passwords must be at least 8 characters long.
Credentials	****** Passwords must contain an upper case character.
Qualifications	Passwords must contain a lower case character.
Events	Passwords must contain a special character.
Email History	Passwords must contain a number.
Accounts	
My Orders	User
Payment History	Username Last login AntrimAdmin 27/07/2015 12:42

# 7. Qualifications

Qualifications lists any individuals IRFU qualifications that they have obtained

Antrim								Export
✓ Qualifications								▼ Filters
<ul> <li>Foundation (STAGE 2)</li> </ul>	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.

А	ntrim >														Export
~	Event Name									Transaction Code			Payment Method	Paid	▼ Filters
2	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. <u>jobloggs@hotmail.com</u>. 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

Summary	Email History								en GB
Details	Mr Antrim Admin							Expor	т
Roles	**	Туре	Send Date	♀ Sent By	Send Status	Result	Exception Details		
Relationships	28 July 2015 11:02	Email	28/07/2015	Mr Antrim Admin (15732088)	Send Complete	Success			Ŧ
Credentials									
Qualifications									
- ma									
Email History									
Accounts									
My Orders									
Payment History									

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

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## 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.

Summary	G My Croten	en-G8
Details	Mr Antrim Admin	Export
Roles	✓ Order Referen. Drake Date Order Total Amount Due Payment Due Balance Status	Filters
Relationships	99341438 2x07/2015 700.00 EUR Paid	
Credentials	✓ 99341437 28/07/2015 100.00 GBP 100.00 GBP Pending	
Qualifications		
Events		
Email History		
Accounts		
My Orders		
Payment History		
	•	

Selecting the Order Reference will display the order details

	40263850 2	03/2015	£10.00		Paid

It displays the details relating to that order

Order Detail				
Order Information 99341438   Antrim Adr	nin   700.00 EUR		Contact Detai	ls
Standard Price Standard Price EventAttendance 22957	700.00 Qty: 1	700.00		Antrim Admin Hersham Place 41-61 Molesey Road Walton-on-thames England KT124RZ
Cost				antrimadmin@test.com
Total		700.00 EUR		
Payment Information			Club Details	
28/07/2015 - Cash - Paid Total Paid		700.00 700.00 EUR		Antrim Allen Park Randalstown Road Antrim Northern Ireland BT41 4JX <u>name@name.com</u>

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

Mr	Max Test						(	Selected 1 Export Pay View Receipt
~	Order Referen	Order Date	Order Total	Amount Due	Payment Due	Balance	Status	✓ Filters
?								- 🖪 Clear
T		e	1		e	5		P Search
~	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

💠 IRFU	Personal D	Details 🔻							TEST 👻 🖲	•
Summary	My Orders									÷
Applications	Max Test							C	New Order	
Details										
Roles	Order Reference	Order Date	Order Total	Amount Due	Payment Due	Balance	Status		Filt	ters
Relationships	1980	11/11/2016	0.00 EUR	0.00 EUR	11/11/2016	0.00 EUR	Pending			
Qualifications										

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

💠 IRFU	Personal Details 🔻						TEST 👻 🔍 💌
Summary	🔳 Summary						:
Applications	Select Additional Products						Cancel Next
Details							
Roles	Filters	Jesey	~	Socks	~	Basket	
Relationships	Categories	15.00 EUR		5 00 EUR			
Qualifications	Sport Kit	Jesey		Socks			
Events							
Credentials							
Communication							
Communication History							
My Orders							
Memberships							

## The individual can then pay for the item

💠 IRFU	Personal Details 🔻		TEST 👻 🖶 👻
Summary	My Orders New Order		:
Applications	Order Summary		Pay Now Pay Later
Details			
Roles	Orders		Payment Method
Relationships			Please check the order items and the final payment
Qualifications	🖉 Order 2051   Max Test (16795101)   10.00 EUR	amount.	
Events	Sacking .	Unit Price: 10.00	Click the pay button to continue.
Credentials	Socks	Quantity: 1	Cash  Cheque  Other
Communication			
Communication History		Sub Total 1	CHEQUE NUMBER
My Orders			
Memberships			COMMENTS

#### 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

💠 IRFU	Personal Details 🔻						TEST 👻 🖲 💌
Summary	Memberships						:
Applications	Max Test						Review Order
Details							
Roles	Membership Record						
Relationships	INDIVIDUAL REF	FULL NAME	DATE OF BIF	тн			
Qualifications	16795101	Max Test	01/01/1	900			
Events	test Individual						
Credentials	status Pending	RENEWAL DATE 01/01/2018	BEEN MEMBER SINCE 11/11/2016 (26 days)				
Communication							_
Communication History	RelatedMemberships						Add Member
My Orders	✓ URN Member	Membership Scheme	Member Organisation	Membership Type	Status	From	Renewal 🔶
Memberships	16795101 Max Test	test	TEST	Individual	Pending	01/01/2017	01/01/2018
	Selected 0 of 1 Page 1 of 1				Rows	25 Page	K K 1 > > R