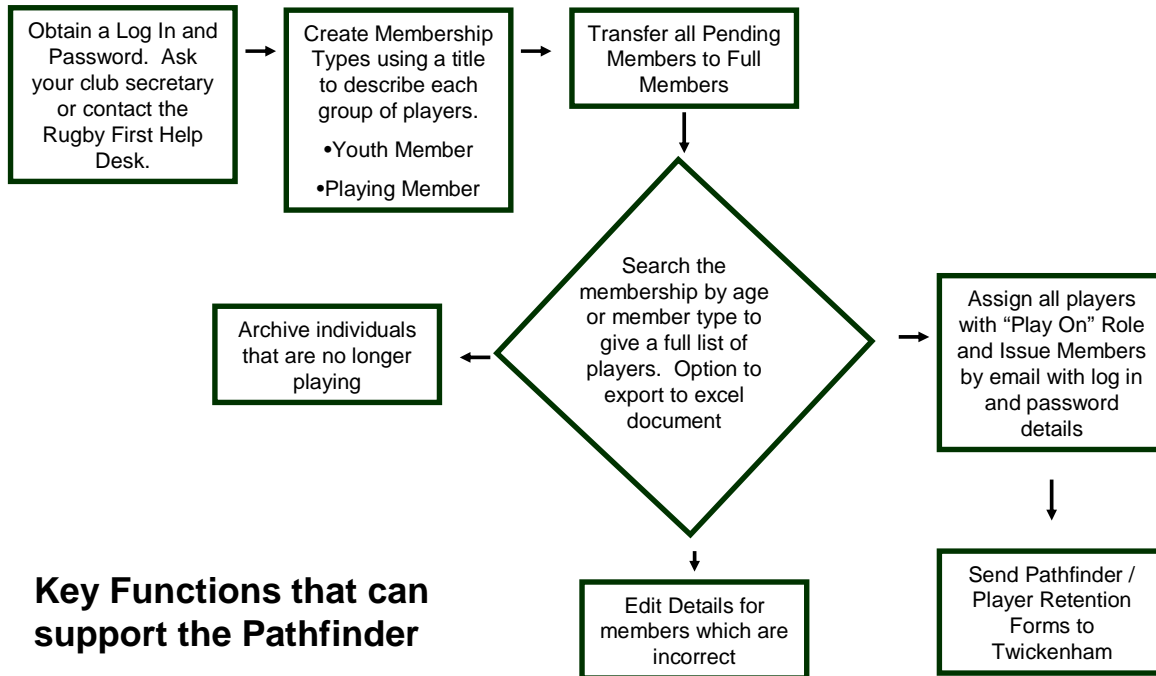


Rugby First Membership Management for Clubs and Universities



Quick Reference Guide - Navigation

This guide provides a brief overview of the navigation features that are available within the RugbyFirst website.

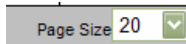
Menu Navigation



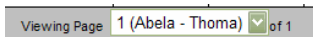
- All functions on the site are accessed from the left hand menu.
- The menu is separated into two blocks of available functions. A subset of the functions in the top block is available to all users before sign on.
- Place the mouse over a menu item to highlight that item.
- Items will appear in the bottom menu block according to your role(s). Therefore, you will only see those functions that your role need to access.
- Some menu items contain further options. In this case a submenu will appear (e.g. Membership – see opposite).
- To select an option place your mouse over the relevant submenu option and click the left mouse button.

List Handling

There are a number of generic features related to the handling of list data. Typically, these are located at the bottom of the list.



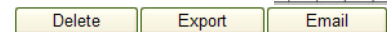
This selector determines the number of items in the list that appear on the page at any one time.



This selector allows the user to jump to a specific page position within the list.

Multi-select List Functions

Some functions that appear towards the bottom of lists (e.g. Export, Email) can be applied to one or more items contained within the accompanying list. To use these functions select the checkboxes pertaining to the applicable items prior to selecting the function.



Tabbed Pages

Some pages have tabs across the top of the page to allow faster access to related information. This is an alternative to scrolling down a single page containing a large amount of data. Clicking on any of the tabs will expose the information pertaining to the tab description.



Icons

Icons are used to undertake a specific function and are typically contained within lists. For example, items in the membership list screen contain three associated icons each performing specific functions.

Membership List

[Click here to search for members](#)

List A: - A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Type	Name	Renewal	Status	Phone/Email	E	⊕	✎	+
Clubbing Meeting	Ryan Abela * Club Officer * Coach / Senior * Coach / Senior	27/07/2008	FULL	garrig@trf.sports.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clubbing Meeting	Peter Bramley * Club Officer / Chairman * Member / Not Recommended	24/02/2008	FULL	garrig@trf.sports.com 44 3333 333333	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Quick Reference Guide - Membership

The **Membership** section allows you to manage all tasks associated with managing members and their roles.

All Club Members can navigate to the **Member List** screen from the **Membership** menu and view member details.

1. Search and View member's details

Membership List
Click here to search for members
List All - ABCDEFGHIJKLMNOPQRSTUVWXYZ

Type	Name	Renewal	Status	Phone/Email			
Playing Membership	Harold Acton ↳ Secretary / Social ↳ Referee ↳ Player / Not Registered	19/07/2007	FULL		£		
Playing Membership	Kevin Bailey ↳ Club Officer / Chairman	19/07/2007	FULL	kBailey@first-sports.com <i>*Away until August 25th, please.</i>	£		

Search for member:

- Click on the link (located above the table) to search for members or click on the letters to search for a member by their surname.

Access member details:

- Click the **binoculars** icon next to the member's name. Alternatively, click on the member's name.

2. View / Change own Details / Password

- Click **My Details** from the left hand menu.

The data in this section is categorised. The editable information for each category can be shown or hidden by selecting the red title bar for that particular category.

e.g. Change personal details:

- Select the **My Details** category. Edit the data contained in the category and then click on the **Update My Details** button to save the data.

My Details - Click here to change your personal details.

Personal Information

Title: Mr

First Name: Rob

Last Name: Terence

Date Of Birth: 10 March 1975

Gender: Male

Occupation:

Contact Information

Home Phone: Area Code: 0208 Number: 43690350

Work Phone: Area Code: Number:

Mobile Phone: Area Code: 0755 Number: 2345611

3. Creating new members

- Main Menu: click **Membership**
- Sub menu: select **Member List**

Create member:

- Scroll to the bottom of the list of members and click on the **Create New Member** button.
- Enter details (name and/or date of birth) for the member and click **Search**. If the

Membership	Shane O'Connell	04/08/2006	ENQUIRY		£		
Honorary Membership	Shane O'Connell	03/08/2007	FULL		£		

Page Size: 20 Viewing Page: 1 (a - O'Conn) of 2

Viewing Page: 1 (a - O'Conn) of 2

Viewing Page: 1 - 20 of 30

Create New Member Email Selected Users Export Selected Users

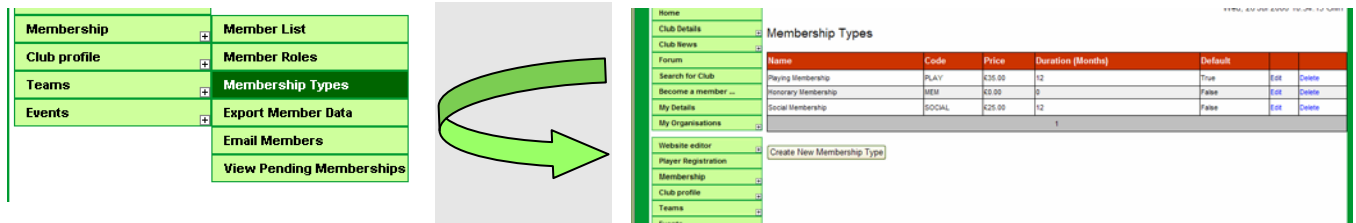
Create Member

Enter New Member Information

First Name: Shane Last Name: O'Connell DOB: 26/10/1972 Search

member does not exist, no results will be found and you will be given the option to add the new member by clicking the **Add New** button. You will then be presented with the same pages as used for **Edit Member** with the name and date of birth fields pre-filled (if previously entered). Proceed by entering relevant details for the member across the five available pages and select the **Save** button to create the member record.

4. Edit Membership Types



Create Membership Type:

- Click on the **Create New Membership Type** button.
- Insert the information in the fields provided for the membership type. All fields need to be completed
- Click the **Save** button.

Edit Membership Type:

- Click on the **Edit** link associated with the type you wish to edit.
- The information for the membership type will be displayed in editable fields. Edit the information and click the **Save** button.

Edit Membership

* Name

Description

* Membership Code

Sort Order

Price

Duration (Months)

Sales History Note

Is this default membership type for new memberships?

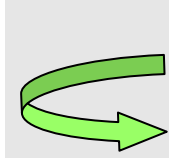
Delete Membership Type:

- Click on the **Delete** link associated with the membership type you wish to delete.
- Confirm the deletion by selecting the **Delete Membership Type** button.


5. Transfer pending members to full members

- From the main Rugby First menu select **'Membership'**
- From the 'Membership' sub-menu, select **'View Pending Memberships'**. This will open the 'Pending Membership List'
- Select the members you wish to process by ticking the check-box to the right of each entry. You can process one, all or a selection of records at any one time
- Scroll to the bottom of the list. Under 'Select Membership Type & Status for Selected Individuals' use the drop-down menu to select the relevant Membership Type (e.g. Youth Member)
- Click once on the **'Process Pending Applications'** button. This action will generate the following message: - 'XX Memberships(s) were created successfully [Click here to return to the Pending Membership Screen](#)'
- All selected records will now be visible in the clubs Membership List

6. Edit a member's details



Edit Member details:

- Find the Member whose details you wish to change and click on the **Pencil** () icon.
- Information for the member is contained over five pages which are each accessible using the five tabs located across the top of the page; Personal Details, Contact Details, Membership, Security options and Payment details (see screenshot overleaf).
- As you navigate through the pages you may modify data which will be retained should you return to a page. Once all edits are complete the data must be saved by selecting the **Save** button.

Edit features: Update Address Details:

Method 1 (quickest):

Select the **Contact Details** tab. Enter a valid UK postcode into the postcode field and select the **Address Lookup** button. If the postcode is valid and verifiable and there is more than one address matching the postcode the system will display a pop up window with an address list to select from. Select the appropriate address and click **OK**. The address fields will be automatically populated.

Edit Member - Roger Lawson

Personal Details **Contact Details** Membership

Address

Number/Building

Address 1

Address 2

Address 3

Town

County

Postcode

Address Lookup

Method 2: Type the address into the appropriate fields provided.

Edit Features: Insert a new Role:

- Select the **Membership** tab.
- Select the new required role from the **Role Name** pull down selector.
- Once the page has refreshed select the category (**Player**) from the **Category** pull down selector.
- Once the page has updated select the Sub-category (**Play On**) from **Sub-Category** pull down selector (if applicable).
- Select the **Add** Button to insert the role for the player. The new role will appear in the table displaying the list of roles (**N.B.** if the role does not appear it may be located on following pages – click on the page numbers located at the bottom of the table to traverse through the roles).

Edit Member - Roger Lawson

Personal Details Contact Details **Membership** Security Payment

Membership

Membership Type: Honorary Membership
 Enquiry Date: 18/07/2006
 Join Date: 18/07/2006
 Membership No:
 Renewal Date: 18/07/2006
 Status: Full
 Membership Statement (This will appear next to your name in the membership list. 255 character max.)

Role Positions

Role Name: Committee Category: Management Sub-Category: Member **Add**

Role	Category	Sub Category	
Website	Webmaster		X
Secretary	Membership		X
TeamRoles	Team Manager		X

1 2

7. How to archive a member

- From the main Rugby First menu select **'Membership'**
- From the 'Membership' sub-menu, select **'Member List'**. This will open the 'Membership List' page
- Select the membership record you wish to archive by clicking on the **edit icon** (yellow pencil) to the right-hand side of the membership record. This will open the 'Edit Member' page
- Click on the **'Membership'** tab
- Using the drop-down menu, amend the 'Status' field to read **'Archived'**
- Click once on the **'Save'** button at the bottom of the page to effect change

8. Export membership details

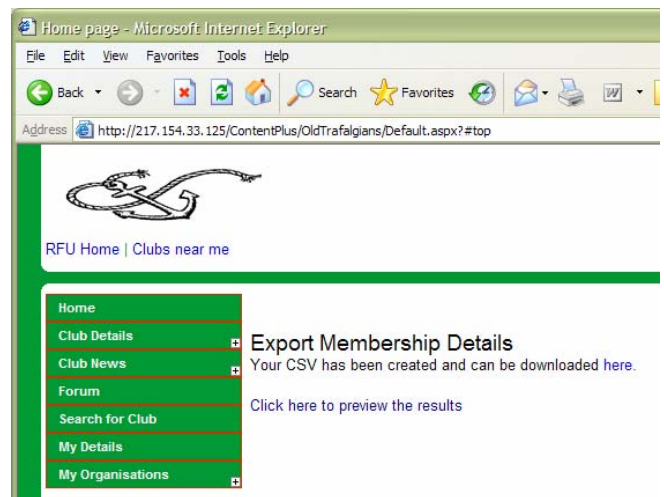


There are a number of list pages throughout the membership section where items can be selected using checkboxes located on the right hand side of the page. An **Export** button allows you to export the selected items.

To export details for members using your own selection criteria highlight **Membership** on the main menu and click on **Export Member Data**.

Select the criteria you wish to use to create the list of members required for export. Select the **Search** button. Determine the type of information to be exported for each member before selecting the **Create CSV File** button.

The resultant page will provide a link (as shown) to a spreadsheet which can be saved locally on your computer or viewed and printed.



Rugby First Help Desk

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Hours of Support Mon, Wed, Fri & Sat 11-00am to 3-00pm & 4-00pm to 7-30pm