

Microsoft Partner
Silver Application Development

FIRSTSPORTS

GMS – People

**Membership Statuses
&
Update Membership Status**

Introduction

The membership status and updating membership statuses is a quick method of updating or moving members to different grids.

Which individuals appear in which grids is determined by the membership status they have and the status is determined, the current state of membership they are assigned.

On GMS you have the following Grids and the following membership statuses will appear in each of those grids

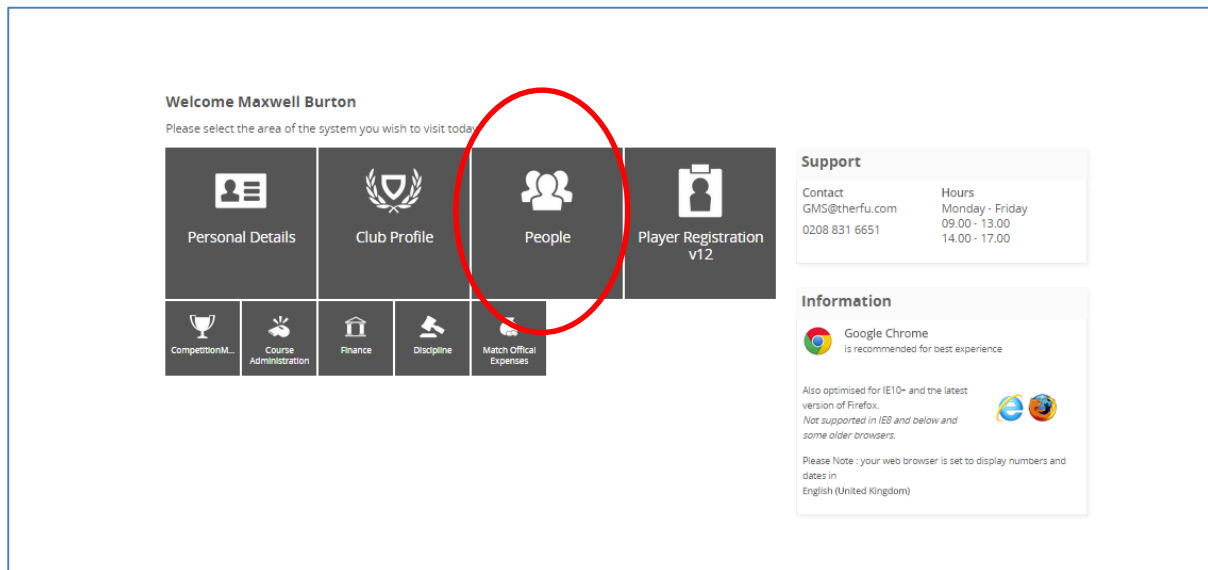
Grids	Statuses	Explanation
Everyone	Active, Inactive, Pending, Archived	An overview of all the grids
Members	Active	Holds a current Membership (non expired)
Lapsed	Inactive	Membership Renewal date is in the past. Membership Scheme no longer valid/out of date
Pending	Pending	Manual status change to pending or individuals that have been assigned a membership scheme, but 'Pay Later' has been selected, so they have an outstanding balance
Non Members	Archived & No Status	Manually archived members, newly registered players at the club (Adult & Youth) and parents of youth players

Essentially updating statuses give the clubs the flexibility to overwrite or bypass the 'Buy Membership' function. The club can choose to manually update the status of the individuals to ensure the right people appear in the correct grids.

(Note: Toggling between membership statuses is not the method for managing members and memberships schemes within a club, the only way to do this is to Buy Memberships for the members as and when is necessary)

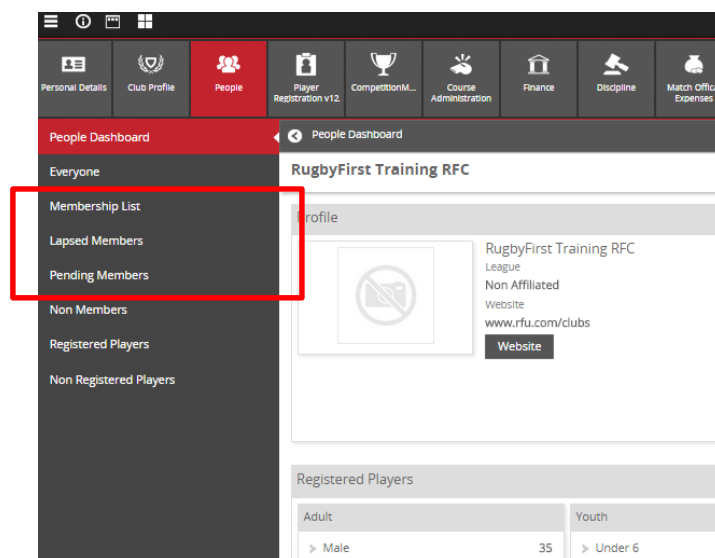
1. Updating a Status

To update statuses, the user must select **People**



From People the Dashboard will load. Below the People Dashboard heading in the left hand navigation, there are a number of grids. These grids represent the different membership statuses an individual currently holds. i.e. If their membership has expired they will appear in Lapsed.

It is only possible to update statuses via Members, Lapsed and Pending. To update a status, **Select a Grid**



From the Grid, select the individual whose status is to be updated, or multiple individuals

RugbyFirst Training RFC										Selected 1	Add To Group	Export	Send eMail	Buy Membership	More
Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Balance	Membership Number	Date Of Birth	Address						
Adult Player (Non Registered)	Max	Test	1591816	Active	14/07/2015	0.00		01/01/2000	Holme Park Sonning Lane Reading Berkshire RG4	Request Payment Apply For DBS Update Membership					
Social	Max	Test	1804330	Active	14/07/2015	0.00		09/01/1979							
Family Test	Max	Test 1	1053053	Active	13/08/2015	0.00		09/01/1979	Rugby House Rugby Roa Twickenham Middlesex T						
Family Test	Max	Test 11	1099622	Active	13/08/2015	0.00		09/01/1994	Rugb Y House MIDDLESEX CORNWALL TW2 1 DS						

The update screen will display the different membership statuses that can be assigned. If the individual is being updated from Inactive to Active, it is also possible to change the renewal date as this will reactivate their previously held membership with the renewal date entered.

Changes

* New Status

- Active
- Archived
- Pending
- Active
- Inactive

New Renewal Date

People Affected (1)

Member	Message
Max Test	Ok to update.

Depending on the status selected, once completed the individual will appear in the relevant grid (i.e. Max Test, status changed to Archived, they will now appear in Non Members and Everyone)

Membership List													
Membership Type	First Name	Last Name	RFUID	Date Of Birth	Address	Phone	E-mail	Balance	Source	Contact	Player	Player Type	DBS
Lapsed Members	Max	Test											
Non Members	Max	Test	1599618	09/01/2001	7 Blenheim View Leeds ...			0.00	Contact	Yes	Yes	Registered Player (You ...	
	Max	Test	1591818	09/01/2005	200 Witcon Road Twid ...			0.00	Player	Yes	Yes	Registered Player (You ...	