



SURF LIFE SAVING
NEW ZEALAND



PATROLS AND MEMBERSHIPS

Patrols and Member Database Newsletter #3

July 3, 2015

Project Update

After 3 years of planning and development the new PAM database went live this week and after some testing in the past few days Georgia and I are happy that it is functioning properly and read to let loose on you all. It is great to finally have this live and running and I must say a big thanks to Georgia, Grant Carpenter, Jamie Nilsson and Hayley King for the work they have done on the project to make it happen. There have also been many other people that have assisted to make this happen – thank you all.

The new URL's for the live site are below. Please see below in the Frequently Asked Questions section for more information about logging in.

CRM: <https://crm.surflifesaving.org.nz/>

Portal: <https://webportal.surflifesaving.org.nz>

PLEASE REMEMBER: we are not in the training system anymore so any changes you make are permanent.

If you have any problems logging in or questions about the system please contact Georgia and she can sort it as soon as possible. She is on the road training in the next few weeks so won't be on the end of the phone full time - Matt Warren | SLSNZ Projects Manager

User Manuals

There will be manuals available to all of our administrators very soon. These will be located on the **PAM** page in the Clubhouse section of the website. We will also provide quick reference cards with one page guides as to how to complete a variety of key club administrator tasks.

Training

We have already delivered training in many areas around the country and will be continuing to do so throughout July and August. Regional staff members have been liaising with their club administrators to get these dates set up for us and if you feel you require more training please make them your first point of contact.

Upcoming Training:

Gisborne area	9 th July
Bay of Plenty area	16 th July
Coromandel area – pending interest (Coromandel admins may prefer to attend either BOP or Auckland sessions)	TBC
Auckland area (liaising with Regional staff)	x2 sessions in July – dates TBC
Dunedin area	27 th July
Tasman area	TBC

We are also developing a new sport system which will include entry to events and a mobile app that will be able to access the new PAM database. I expect that with all of this new technology it won't be completely problem-free but please patient as we deal with these. Thanks you all for your patience and input to the project to date.

Upcoming Activities

July – Aug	Training for staff and Clubs around NZ
July	Entries system up and running
September	New mobile app developed

Database Features

New Functions

- **Member Lounge** – mobile-friendly portal where every member of SLSNZ can log in and view their upcoming patrols, see their current and about to expire awards, as well as update their contact information.
- **Subscriptions** – record all of your subscription information in PAM – including billing references, the date subs were paid and the type of sub. Use the Family section to add Junior Surf members to an administrator (parent) to make family billing easier.
- **Reporting** – decide what information you want to see and create your own reports to export and share to others.

Future Functions (we predict 1-2 seasons away)

- **Patrol Apps** – reduce your paper and load Patrol Captain Forms and Incident Reports at the beach on the day of your patrols straight into the system.

Frequently Asked Questions

If you've got a question about PAM, it's more than likely that someone else is wondering the same thing. We've compiled a list of our most frequently asked questions but if they don't answer yours please send [Georgia McLaren](#) an email and she will get back to you, ideally within 24 hours.

1. What has happened to the old PAM system?

The old PAM has been switched to a read-only setting. All club admins who had access to the system will still be able to log in using their old details however they cannot edit, create or change any information. The old PAM will stay in this state for at least two years until we have fully transitioned to the new system. All changes now need to be made in the new system.

2. What is the difference between the Portal and the CRM?

CRM stands for Customer Relationship Management. These systems are often used as a business tool for managing customers, products, and sales. Our CRM is an out of the box system that has been tailored to suit Surf Life Saving New Zealand's requirements, i.e. our memberships, awards and patrolling. The CRM has different levels of access – club, regional and national just as the old PAM system did. It is a comprehensive databank that takes a bit of getting used to which is why we developed the Portal to use alongside it.

The Portal is essentially the 'lid' on top of the CRM – it displays all of the same information as the CRM but was designed to be easier and simpler. Its layout is very similar to our previous PAM database and we have found that it is very intuitive and easy to use.

Again, user manuals for both systems will be available on the [SLSNZ website](#) shortly.

3. Will I use my old PAM log in details?

Not in this system. You will now be assigned new log in information for both the CRM and the Portal.

4. How do I log into the new database?

Many club admins have already been set up to access their database when we undertook training in their areas. To set these people up we entered the back end of the CRM and manually gave them club admin rights to the portal. Those of you who were given usernames and passwords for the Portal and CRM at these sessions may continue to use these. **Please use the URL's provided above as the previous ones were for training use.**

We now have a workflow that will allow us to bulk upload club admin rights. In short, it will give the selected contact a default username, enable your logon, create an invitation and send it to your email address. You will need to click on the link in the email, confirm your password and security question and answer and submit. Please let Georgia know who requires club admin access in your club so she can get these sent out.

Questions and comments: If you have any questions or comments please contact Georgia McLaren – Website and Database Administrator | georgia.mclaren@surflifesaving.org.nz | 04 560 0326