



## Patrols and Member Database Newsletter #4 July 17, 2015

### Project Update

Welcome to Edition #4 of the PAM Newsletter. We are well into the training phase of the project and Georgia has been travelling around the country running training sessions for all of our PAM admins to use the new system. For most this has been an easy transition from the old PAM with an overview of the new features.

This week we completed the season roll over and brought all clubs through to the 2015-2016 season. During this time we have brought through all club admins and life members as has been done in the past. Please check to make sure these are correct. There are details below for you to bring through your other members to the new season.

We also had our first look at the Surf Life Saving App which will have the functionality of the PAM portal. We expect this to be ready for member use in late September.

The 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: This is a live system so any changes you make are permanent. We do have a training system in place that is currently being modified so that you can use it to train. If you have any problems logging in or questions about the system please contact Georgia and she can sort it as soon as possible.

### 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.

#### What is the difference between my Contacts/Members and my Memberships?

A contact (or member in the Portal) is the person. Each contact (person) can have a number of different memberships but can only have one primary membership per club. A membership is the type of link (membership) the person has to the club. There are a range of different types of membership (Primary, Secondary, Life, Associate, and Sponsor) that a contact can have and these will be attached to the member for the season.

#### How do I view my Current Memberships?

You can only do this if you have Club Admin rights. Open the portal, open "My Club" and click on Memberships. This will give you a list of active memberships for the current season. There is a tab for "active memberships" and the view can be changed to "inactive memberships" which is the historic members. Historic members can be made active by clicking on the arrow icon  and choosing to "roll over to current season"

## Additional Help:

Make sure you check out the [PAM page](#) on the website where we have added lots of handy links. The user manuals will be available here in the near future, thank you for your patience while we publish these. We have published a selection of one page guides for the Portal which will be joined by more soon, as well as quick reference cards for the CRM. Here you will also be able to find the Frequently Asked Questions that are included in our weekly newsletters.

We've included a step by step guide below about how to make your memberships current in the Portal and the CRM.

## Frequently Asked Questions from Edition #3

### 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.

### 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.

### 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.

### How do I log into the new database?

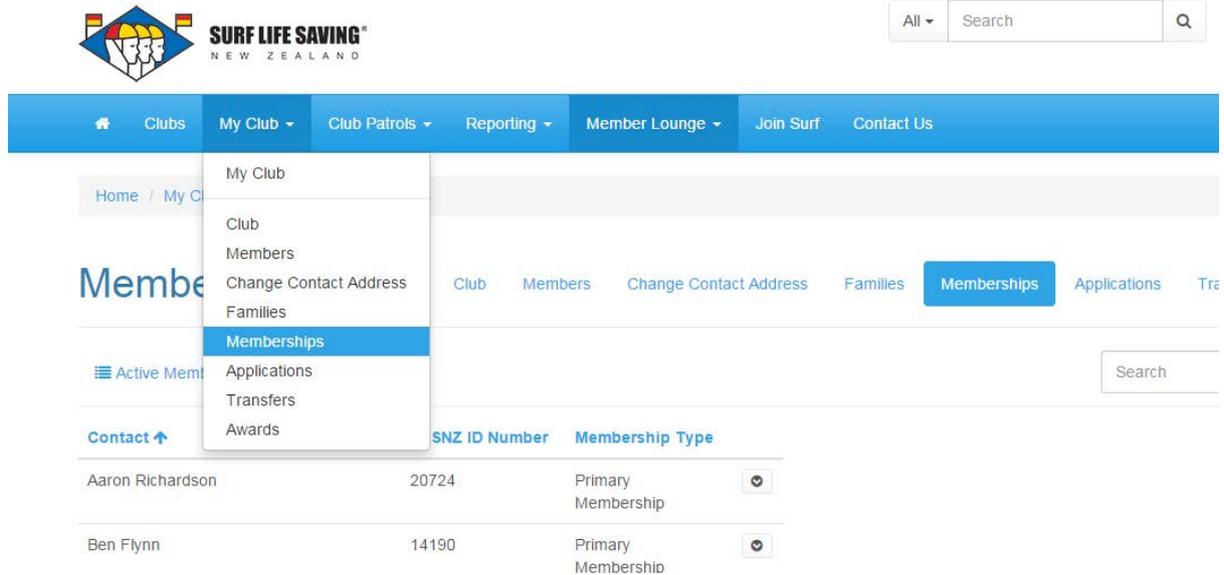
Many club admins have already been set up to access their database when we undertook training in their areas. To set these people up we entered the back end of the CRM and manually gave them club admin rights to the portal. Those of you who were given usernames and passwords for the Portal and CRM at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

**Questions and Comments:** If you have any questions or comments please contact Georgia McLaren – Website and Database Administrator.

## PAM How to guide – Activating Memberships

The How to guide today is about managing your members in the Portal and the CRM. At the end of each season your list of memberships will be made “inactive” during rollover and you will start with a clean slate again. The only members that will be bought through are the Club Administrators and Life Members. You will need to make your memberships “active” each season following the rules you have in renewing a person’s membership. This can be done a few ways but we will explain the easiest below (you will need to have Club Admin rights to perform this for your club).

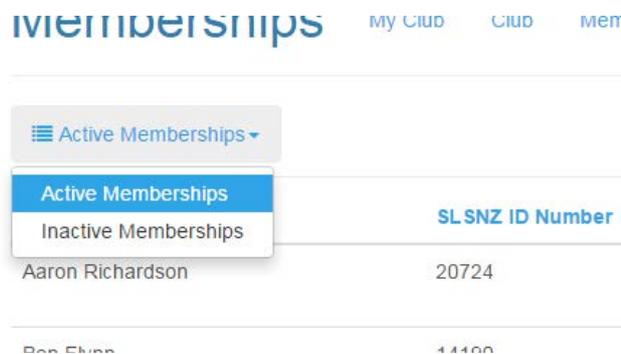
1. Open the Memberships view in the “My Club” section of the portal. This will bring up the list of “Active” memberships.



The screenshot shows the Surf Life Saving New Zealand portal. The top navigation bar includes 'Clubs', 'My Club', 'Club Patrols', 'Reporting', 'Member Lounge', 'Join Surf', and 'Contact Us'. The 'My Club' dropdown menu is open, showing options like 'My Club', 'Club', 'Members', 'Change Contact Address', 'Families', 'Memberships', 'Applications', 'Transfers', and 'Awards'. The 'Memberships' option is highlighted. Below the menu, there is a search bar and a table of active memberships.

| Contact          | SNZ ID Number | Membership Type    |
|------------------|---------------|--------------------|
| Aaron Richardson | 20724         | Primary Membership |
| Ben Flynn        | 14190         | Primary Membership |

2. Click on the active memberships tab and choose Inactive memberships.



The screenshot shows the 'Memberships' page. The 'Active Memberships' dropdown menu is open, showing options for 'Active Memberships' and 'Inactive Memberships'. The 'Inactive Memberships' option is highlighted. Below the menu, there is a search bar and a table of inactive memberships.

| Contact          | SL SNZ ID Number |
|------------------|------------------|
| Aaron Richardson | 20724            |
| Ben Flynn        | 14190            |

3. Choose the membership you want to roll over, click on the  button and choose “Rollover to Current Season”



The screenshot shows a table of memberships with columns for 'Contact', 'SL SNZ ID Number', 'Membership Type', and 'Season'. A dropdown menu is open for Aaron Giles, showing options for 'Edit' and 'Rollover to Current Season'. The 'Rollover to Current Season' option is highlighted with a red circle.

| Contact       | SL SNZ ID Number | Membership Type    | Season    |
|---------------|------------------|--------------------|-----------|
| Aariel Clisby | 67281            | Primary Membership | 2015/2016 |
| Aaron Giles   | 61350            | Primary Membership | 2015/2016 |
| Aaron Lynch   | 54877            | Primary Membership | 2015/2016 |

This process can also be done using the CRM and you can process multiple members at once.

Open the Memberships view and go to the “inactive membership”

CLUB : ACCOUNT - SLSNZ ▾  
 Paekakariki Surf Lifeguards

Membership Associated View ▾

- System Views
- Active Membership
- Active Membership with Current Qualifications o...
- ADX Admin Portal : Inactive Memberships
- ADX Admin Portal : Memberships
- ADX Admin Portal : Memberships in My Club
- ADX Admin Portal : Subscriptions
- ADX Member Portal : My Family Memberships
- End of Season Summary
- Inactive Membership**
- Membership Associated View
- Membership without Club Season Member Stats
- Subscriptions - On Family Subscription
- Subscriptions - Un-Invoiced
- Subscriptions - Un-Paid

RUN REPORT ▾   EXPORT MEMBERSH

| Club                        |
|-----------------------------|
| Paekakariki Surf Lifeguards |

Select the Memberships you want to make active and click the “Activate” button.

Microsoft Dynamics CRM ▾   MEMBERSHIP ▾   Clubs ▾   Paekakariki Surf Life... ▾   + Create

CLUB : ACCOUNT - SLSNZ ▾  
 Paekakariki Surf Lifeguards

Inactive Membership ▾

+ ADD NEW MEMBERSHIP   **EDIT**   **ACTIVATE**   DEACTIVATE   SEND DIRECT EMAIL   ADD TO QUEUE   ASSIGN MEMBERSHIP   ...

| ✓ | SLSNZ ID Number | Contact ↑                      | Birthdate (Contact) | Membership Type    | AKA Names | Created On            |
|---|-----------------|--------------------------------|---------------------|--------------------|-----------|-----------------------|
|   | 67281           | Aariel Clisby                  | 24/01/2001          | Primary Membership |           | 29/04/2015 11:33 a.m. |
| ✓ | 61350           | <a href="#">Aaron Giles</a>    | 7/03/2002           | Primary Membership |           | 29/04/2015 11:33 a.m. |
|   | 54877           | Aaron Lynch                    | 6/08/1994           | Primary Membership |           | 29/04/2015 11:36 a.m. |
| ✓ | 76110           | <a href="#">Aaron Wall</a>     | 20/04/2000          | Primary Membership |           | 29/04/2015 11:35 a.m. |
|   | 74677           | Abbey Welch                    | 19/12/1994          | Primary Membership |           | 29/04/2015 11:36 a.m. |
| ✓ | 94172           | <a href="#">Abby Creighton</a> | 8/04/2008           | Primary Membership |           | 29/04/2015 11:35 a.m. |
|   | 56750           | Abby Laws                      | 11/05/2001          | Primary Membership |           | 29/04/2015 11:33 a.m. |
|   | 61508           | Abby MacDonald                 | 21/08/2001          | Primary Membership |           | 29/04/2015 11:35 a.m. |