

Newsletter #5 – Club Admin Special

Hi everyone and welcome to the fifth edition of the PAM newsletter.

Thank you to all of the club administrators who have contacted me with problems they have encountered while using the new database. The sooner we identify these, the quicker we can pass them on to the developers to make changes.

Project Update – Matt Warren (SLSNZ Senior Executive):

The new PAM system is now operational and most clubs have been trained and are using the functions of the system. We still have some minor changes that will be made in the next few months as we get to know the system and work out ways to make this operate better.

The focus in the next few months will be to ensure all clubs know how to use both the member and patrols functions. This will be a mix of one on one and groups sessions for those that need it. We will also be looking at future development and any changes to improve the system.

User Guides + Additional Help:

You will now find the first version of the CRM User Guide on the [PAM page](#) on the website, as well as a selection of quick reference cards for the Portal. We have recently created a page for [Frequently Asked Questions](#) which you will see located just underneath the main PAM page when you are in the website. Please see below for a list of FAQ's.

Cases:

Here's an update of some of the key cases that we currently have open with the developers. Many of these are at the stage where they are ready to be rolled out to the live database system as soon as possible. Many of these cases relate to the membership and I really appreciate your patience and understanding as we work with the developers to iron these out.

- Terms and Conditions (to be added) – Membership Application Form
- Compulsory fields (to be added) – Membership Application Form
- Email notifications
- Transfers process
- SLSNZ membership numbers
- Applications in the CRM (these are currently only viewable in the Portal)
- Club Roles (Portal)

If any club admin has accepted a new member online and they have not had an ID number assigned to them, please let Georgia know so that one can be manually created for them.

Admin Access:

Many clubs have more than one administrator with access to the Portal. Remember it is up to the club as to who has access to the system – please continue to send through names of people who you require to have access so they can be set up.

Patrol Access – many of you attended PAM trainings earlier in the year but we expect and understand the retention of information regarding the club patrols may not be as clear anymore. We will provide material shortly that can be distributed to your club admins who will use the Portal for these functions.

These may include:

- Other administrators
- Patrol Captains
- Lifeguarding Coordinators

Carnival Entry System (EnterNow):

It is great to have heard plenty of really positive feedback about how nice and easy the new sports system is to use. Your Portal and CRM usernames/passwords will not get you entry to this system. Please contact the Sport Manager if you have not received your clubs log in information (Mike Lord | mike.lord@surflifesaving.org.nz).

Your members must be **active** and (closer to the summer season) must also be **refreshed** in PAM to be seen in the entry system.

If you have accepted or created a new member in your club this season you may find that you cannot see their record when you are doing your entries. If this is the case please send an email with the member's primary club and full name to both Georgia and Mike to get their membership confirmed entered into the sports system.

Frequently Asked Questions: click the links for more information

1. How can I bulk rollover my members for the 2015/2016 season?
2. How can I see more records on my page in the CRM?
3. Someone is transferring into my club – how do I accept them in the CRM?
4. What does 'CRM for Phones' mean and why am I seeing this?
5. How I accept people who have applied online?
6. How does a club admin create a new member or contact?
7. Can I record my club member's subscription details?
8. How do I log into the Carnival Entry System?

