



## Patrols and Member Database Newsletter #6 9 December 2015

### Project Update

Welcome to our sixth PAM newsletter. Summer is here and there is plenty happening on the beaches around the country. Clubs are using the new database for managing their members, entering events and entering patrols. We have over 300 patrols entered into the database to date. Aside from a couple of issues we have identified and are working through, the system is working well and we have a huge amount of information being processed.

We have trialled using a tablet at the beach to enter the patrol information in real time and this was very successful. Clubs must still complete the green patrol captain's form until advised otherwise.

We must take the time to thank all of the people who have been patiently working through the new system. This is a learning curve for all of us and we have been trying our best to get to everyone to provide support where needed. We do understand that there will need to be more training for those using the system and we will do another round in the New Year.

Please ensure that you are using the URL's below for all work that you do in PAM:

**CRM:** <https://crm.surflifesaving.org.nz/>  
**Portal:** <https://webportal.surflifesaving.org.nz>

As always, please get hold of us if you have any questions and we will assist as best we can.

### User Guides

User guides for the CRM and the Portal are available on the [PAM Page](#) on the SLSNZ website. Please refer to these if you have any questions otherwise contact Georgia for further help.

### Member Portal

The Member Portal allows all members access to see and edit their details, view their awards and patrols, as well as request transfers and secondary memberships. Access to the member portal has been a manual process so far as we tweak the online invitation email. This is now working smoothly and we have begun to send this in bulk amount to active members, staggered one club at a time.

These invitations are also sent as part of the 'post processing' when a membership application is accepted (as well as assigning a membership number, contact/member record, and an active membership).

Until the automated process is run at your club, please continue to direct members to [database@surflifesaving.org.nz](mailto:database@surflifesaving.org.nz) if they require access.

## Surf Life Saving App

Make sure you check out the Surf Life Saving App which enables members and public to stay connected on the go. There is a lot of general information in this app and in particular there is a direct link to the Portal home page. Anyone with access to the Portal can follow this link and sign into their Member Portal.



## Patrols

The patrols user guides for both the CRM and Portal have been put on the website. We are continuing to make little changes to the Patrols section as we identify problems and we thank you for your patience during this time.

Similar to the Member Portal, you can further engage your patrol managers with the new system:

- You can set up all of your patrol captains with limited access to **only the patrols** in the Portal – they can access their patrol teams, patrol occurrences and incidents but no member information. Once logged in they can input patrol information on the spot.
- Members who are put into patrols can access their member portal and see their patrol dates.

## Event Entries

The new event entry system (EnterNOW) is up and running. We've provided some troubleshooting tips below.

- Members names will not come up unless they are **active** and a member of the 2015/2016 season. For further instructions on rolling your members over please see the Frequently Asked Questions section below. Since the release of the entry system there have been further developments into activating your members via the CRM.
- Members must hold the correct awards to qualify for events. An awards guide is available below under Frequently Asked Questions below.
- We have the ability to indicate in the database if admins need direct access from the Portal to EnterNOW. Clicking this link (highlighted below) takes you straight to the EnterNOW already logged in as your primary club.



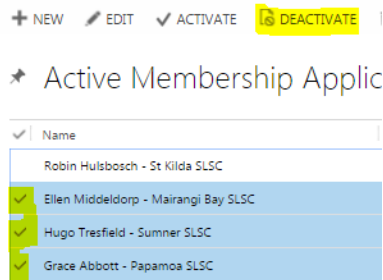
**Questions and Comments:** If you have any questions or comments please contact Georgia McLaren – Website and Database Administrator.

## Frequently Asked Questions:

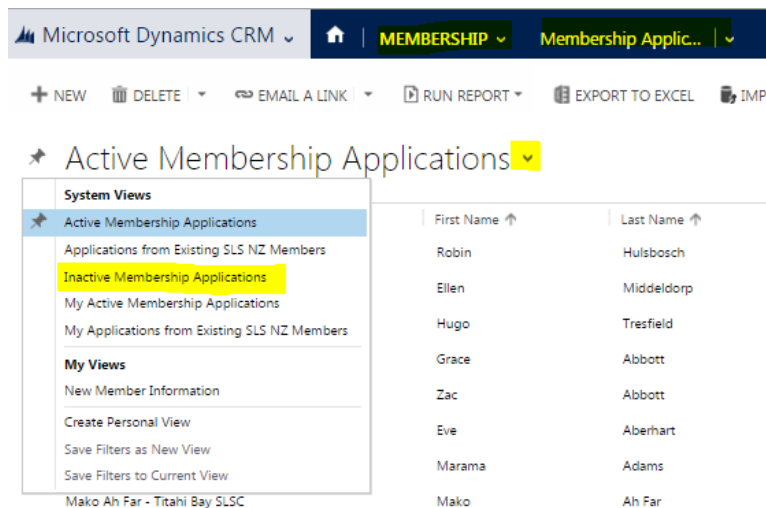
### I have 'post-processed' my new membership application and they have been accepted into my club – how do I get rid of their application in the Portal?

Log into the CRM and go to MEMBERSHIP > Membership Applications.

Tick the applications that you no longer want to see in the Portal and click 'deactivate'.



The application is now inactive and won't show up under the Active Membership Applications view (the Portal only shows active records).



### I want to see all of my club subscription details – how do I see this report?

Let Georgia know and she can share this report with you. Once it has been shared you will find it under MEMBERSHIP > Membership and this can be exported to excel.

### Frequently Asked EnterNOW Questions – please click the links below for further information on how to:

- Roll your members over.
- Add member's awards.
- Check member's awards.