PAM Database - Newsletter #13   July 2017

Welcome to the 2017/2018 season!

Database Rollover

The database was rolled over on June 30 2017. A number of reports were exported prior to this so if there is any information you desperately need, please let me know.

Just to recap what happened with the rollover:

- o The 2016/2017 season ended.
- o All active memberships were deactivated.
- o The 2017/2018 season started.
- o We made every life member active.
- o All other memberships are inactive, waiting for you to start rolling them over!

Season Processes

It's a good time of the season while it's quiet to start ironing out how your club will tackle the administration side of things. Some things to consider:

Invoicing:	Subscriptions:	Applications:
Are you going to invoice your members at the beginning of the season?	**How are you going to record your members subs details?**	**Stop the double ups, use this new report.**
There's a report in the CRM that organises members by the season they were last a member so you can find the ones that will most likely be returning this season.	There's a report in the CRM that displays your active members plus their subs information (if you record this, highly recommended!)	The CRM is great at recognising when someone is already a contact. If it shows that they have a contact record, get in touch with SLSNZ and we'll find out if they should be a transfer instead.
MEMBERSHIP > CLUB REPORT | Inactive Memberships by Season.	MEMBERSHIP > CLUB REPORT | Members & Subscription Information.	MEMBERSHIP APPLICATIONS > CLUB REPORT | Existing SLSNZ Members.

Club Roles: **Has your 2017/2018 committee been elected?**

It's really helpful for staff if you enter your club roles into the CRM. Wanting to do it in bulk? Get in touch for the template.

MEMBERSHIP > Club Roles.

EnterNOW

With various pool competitions/sports events coming up you will need to start rolling over your inactive members to make them **active** again.

Please remember that there is a delay between the CRM and EnterNOW (i.e. names will not populate immediately after you have rolled them over).

Please also consider that for your EnterNOW log in to work from the Portal, you (the admin) must be an **active primary member** of the club you wish to complete entries. You'll need to have been rolled over in the database for this to work.

User Guides

Everything you need to know about the CRM is on the PAM Page on our website. Most importantly there are instructions for rolling your members over in the CRM User Guide, both in bulk and individually.

Booking System

We are still in the process of testing our new booking system. Club administrators will be able to manage their member's bookings more smoothly and we look forward to bringing you more information about this system in the very near future.

Admin Workshops

We're getting ready to tour the country again in the coming season and can't wait to see our returning and new club admins. At this stage we have dates pencilled in the calendar and will send out information to all regions a bit closer to the time. These workshops are a great chance to bring up any questions/problems so start thinking now about anything you'd like to have cleared up when we visit. **Rough agenda below:**

CRM – membership rollover, membership reports, touch on patrol entry, club roles, PAM page on website.
Portal – creating a Portal log in for members, new features on the Portal.
Course Booking System – how to add people to courses, background processes.
Online Learning – how members can use it and what it does.
Entry System – making people active, awards.
Admin Practices – beginning of the season, staff members, who's who.

Please let us know what else would be helpful to cover at these workshops.

Regards,
Georgia McLaren (SLSNZ Database Administrator)