Microsoft Dynamics 365 (CRM)
User Guide

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Contents

Document control

Version control

Version	Date	Status	Comments
0.1	April 2023	DRAFT	First draft
1.0	August 2023	FINAL	First release

Glossary

Term	Definition
Associate Membership	Involvement in the club but is not necessarily a competing or lifeguarding (active) member
Member	The natural person who has the membership
Membership	The association the person (member) has with the club. The membership shows subscription information.
Primary Membership	Someone who competes and lifeguards at the club
Secondary Membership	An association with two clubs. They hold a primary membership elsewhere but may patrol at your club.

Non-functional

Supported browsers

| Browser	Version(s)
Microsoft Edge	64-bit version 115
Chrome	Unsupported – limited copy and paste functionality
Firefox	Unsupported – limited copy and paste functionality
Opera	Unsupported
Safari	Unsupported – exporting to excel does not work as expected.
Internet Explorer	Unsupported

Supported OS

Operating System	Version(s)
Windows	10 +, requires 1 GB RAM (recommends 4GB)
iOS	14 or later, requires 1GB RAM (recommends 2GB)
Android	7.1.1 or later, requires 2GB RAM (recommends 3GB)

Business Units and Security Roles

Business Units

The hierarchy of business units is as follows.
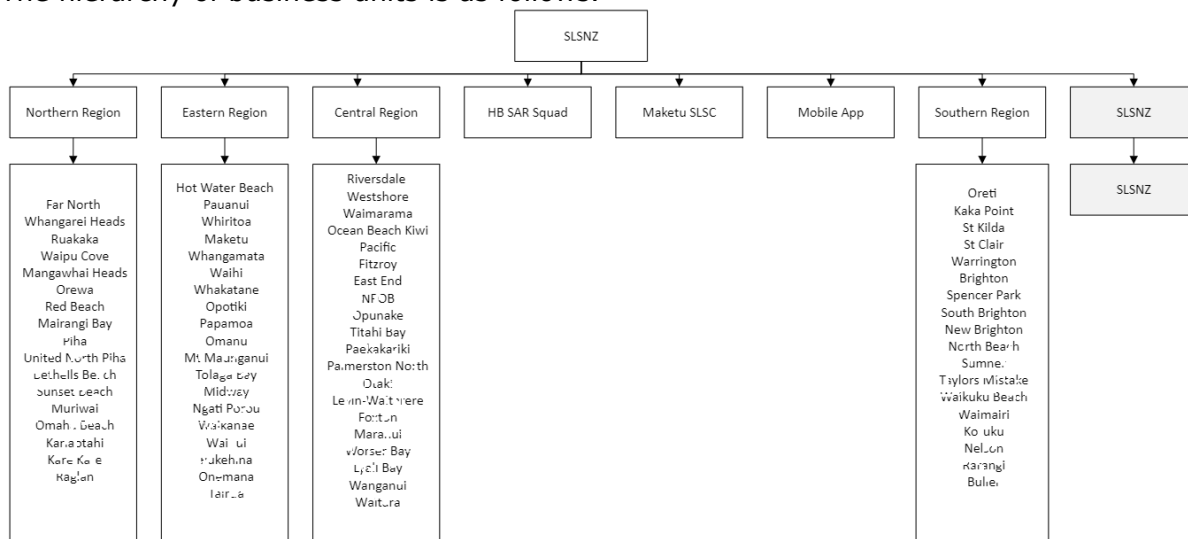
Anyone assigned a single club can see the details and members belonging to that club.
Anyone assigned to a Region can see the details and members of all clubs within that region.
Anyone assigned to SLSNZ can see all regions and clubs.

CRM Security Roles

Even though you have access to a specific business unit, your level of access will be dependent on the security role you have been assigned.

Following are the security roles available within CRM that are used by SLSNZ:

_SLSNZ- Admin Level 1 (Club)
_SLSNZ – Admin Level 2 (Regional)
_SLSNZ – Admin Level 3 (National)
_SLSNZ – Base Role
_SLSNZ - Club Rollover
_SLSNZ – Vetting (Police Liaison)
System Administrator

Following are the combinations of roles that can be used, the associated Business Unit or Team, and what level of access is granted.

CLUB ADMINISTRATOR

Security roles	Assign both roles:
	  o _SLSNZ- Admin Level 1 (Club)
	  o _SLSNZ – Base Role

Business Unit / Team to use	[Club name]

Access provided

Module	Heading 1	Page	Access level
Membership	My Work	Dashboards	No access
		Activities	Create Edit my own
		Reports	View
	Clubs and Contacts	Clubs	Edit my club View others
		Contacts	Edit my club
	Membership	Membership	Edit my club
		Families	Edit my club
	Applications	Membership Applications	Process my club
		Transfers	Process my club
	Sundry	Award Recipients	View my club [1]
		Non-Patrol Hours	Create my club Edit my club View all
		Club Season Member Stats	View my club
		Member Season Patrol Stats	View my club
	History	Club History	View my club
		Club Roles	Create my club Edit my club
Patrolling	Patrol Operations	Patrol Occurrences	Create my club Edit my club
		Patrol Attendance	Create my club Edit my club
		Incidents	Create my club Edit my club
		Patients	Create my club Edit my club
		Head Count	Create my club Edit my club
	Patrol Planning	Patrol Teams	Create my club Edit my club
		Patrol Team Members	Create my club Edit my club
	Statistics	Club Season Patrol Stats	View my club
		Club Monthly Patrol Stats	View my club
		Club Season Member Stats	View my club
		Member Season Patrol Stats	View my club

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[1] If I have an Award Approval Level, I can approve awards.

Module	Heading 1	Page	Access level
National	Clubs and Contacts	Clubs	Edit my club View others
		Contacts	Edit my club
	Membership	Membership	Edit my club
		Membership Applications	Process my club
		Transfers	Process my club
		Award Recipients	View my club [2]
		Club History	View my club
	Courses	Club Course Instances	
	Statistics	Club Season Patrol Stats	View my club
		Club Monthly Patrol Stats	View my club
		Club Season Member Stats	View my club
		Member Season Patrol Stats	View my club

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[2] If I have an Award Approval Level, I can approve awards.

REGIONAL ADMINISTRATOR

Security roles	Assign both roles: - _SLSNZ – Admin Level 2 (Regional) - _SLSNZ – Base Role
Business Unit / Team to use	[Region name]

Module	Heading 1	Page	Access level
Membership	My Work	Dashboards	No access
		Activities	Create Edit my own View my region
		Reports	View my region
	Clubs and Contacts	Clubs	Edit my region View others
		Contacts	Edit my region
	Membership	Membership	Edit my region
		Families	Edit my region
	Applications	Membership Applications	Process my region
		Transfers	Process my region
	Sundry	Award Recipients	View my region[3]
		Non-Patrol Hours	Create my region Edit my region View all
		Club Season Member Stats	View my region
		Member Season Patrol Stats	View my region
	History	Club History	View my region
		Club Roles	Create my region Edit my region
Patrolling	Patrol Operations	Patrol Occurrences	Create my region Edit my region
		Patrol Attendance	Create my region Edit my region
		Incidents	Create my region Edit my region
		Patients	Create my region Edit my region
		Head Count	Create my region Edit my region
	Patrol Planning	Patrol Teams	Create my region Edit my region
		Patrol Team Members	Create my region Edit my region
	Statistics	Club Season Patrol Stats	View my region
		Club Monthly Patrol Stats	View my region
		Club Season Member Stats	View my region
		Member Season Patrol Stats	View my region

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[3] If I have an Award Approval Level, I can approve awards.

Module	Heading 1	Page	Access level
National	Clubs and Contacts	Clubs	Edit my region View others
		Contacts	Edit my region
	Membership	Membership	Edit my region
		Membership Applications	Process my region
		Transfers	Process my region
		Award Recipients	View my region [4]
		Club History	View my region
	Courses	Club Course Instances	View my region
	Statistics	Club Season Patrol Stats	View my region
		Club Monthly Patrol Stats	View my region
		Club Season Member Stats	View my region
		Member Season Patrol Stats	View my region

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[4] If I have an Award Approval Level, I can approve awards.

NATIONAL ADMINISTRATOR

Security roles	Assign both roles: - _SLSNZ – Admin Level 3 (National) - _SLSNZ – Base Role
Business Unit / Team to use	Surf Life Saving NZ

Module	Heading 1	Page	Access level
Membership	My Work	Dashboards	View only
		Activities	Create Edit my own View all
		Reports	Create Edit my own View all
	Clubs and Contacts	Clubs	Edit all View all
		Contacts	Edit all
	Membership	Membership	Edit all
		Families	Edit all
	Applications	Membership Applications	Process all
		Transfers	Process my region
	Sundry	Award Recipients	View all[5]
		Non-Patrol Hours	Create all Edit all View all
		Club Season Member Stats	View all
		Member Season Patrol Stats	View all
	History	Club History	View all
		Club Roles	Create all Edit all
Patrolling	Patrol Operations	Patrol Occurrences	Create all Edit all
		Patrol Attendance	Create all Edit all
		Incidents	Create all Edit all
		Patients	Create all Edit all
		Head Count	Create all Edit all
	Patrol Planning	Patrol Teams	Create all Edit all
		Patrol Team Members	Create all Edit all
	Statistics	Club Season Patrol Stats	View all
		Club Monthly Patrol Stats	View all
		Club Season Member Stats	View all

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[5] If I have an Award Approval Level, I can approve awards.

Module	Heading 1	Page	Access level
		Member Season Patrol Stats	View all
National	Clubs and Contacts	Clubs	Edit all View all
		Contacts	Edit all
	Membership	Membership	Edit all
		Membership Applications	Process all
		Transfers	Process all
		Award Recipients	View all [6]
		Club History	View all
	Courses	Club Course Instances	View all
	Statistics	Club Season Patrol Stats	View all
		Club Monthly Patrol Stats	View all
		Club Season Member Stats	View all
		Member Season Patrol Stats	View all

Most of the Admin Level 3 (National) access is granted through the base role.

The ability to access "All" is granted by the Surf Life Saving NZ business unit.

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[6] If I have an Award Approval Level, I can approve awards.

Helpful tips

Logging in
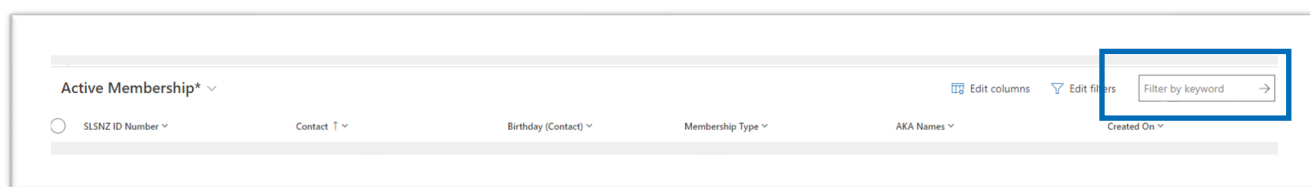
The CRM is now held in the cloud, which means it is accessible from anywhere you have an internet connection.

Locate the CRM by going to: https://surflifesaving.crm6.dynamics.com

When you log in, use your Microsoft credentials, eg. dave.grohl@surflifesaving.org.
If you log in as a club, use your club's Microsoft credentials, eg.
clubname@surflifesaving.org.nz

Searching

When searching for someone, use the search box.

SEARCH BY NAME

If you know the person's first name, enter it in this box and the system will bring up all people in your club or region (depending on your access level) with the same first name spelling.

Note that this person's Contact record shows David, but the system has also searched their AKA name.

USING THE WILDCARD

A "Wildcard" is a substitute, a placeholder for information, the one the CRM uses is an asterix *. You use the wildcard when you don't know all the details.
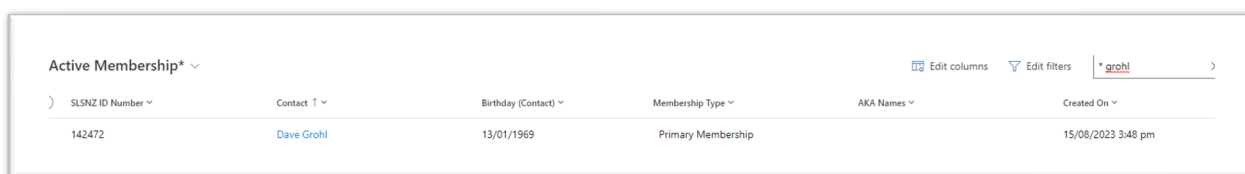
For example, I want to find someone in the CRM, but I don't know his full name. I know his surname is Grohl. If I search "Grohl" no results are returned:

But if I put a wildcard in in place of the first name, the system is able to find him.

Adjusting columns

The views in the CRM have a set of default columns. You can temporarily add another column by using the Edit Columns feature.
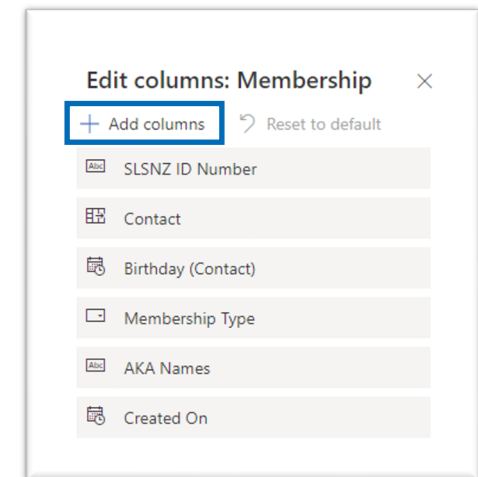
Step	Person	System	Step
1.	User	CRM	Click Edit Columns

| 2. | User | CRM | Click Add Columns from the pop out |

3.	User	CRM	The next screen shows all the columns available. Chose the one(s) you want, then click Close. When you click on a column name it will disappear from the list.
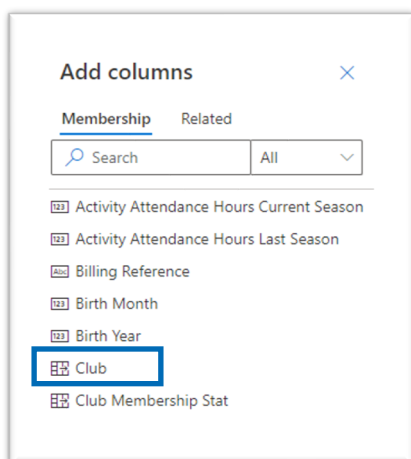
4.	User	CRM	The system then displays the list of columns that will be shown. I've added Club to my list. Click Apply.
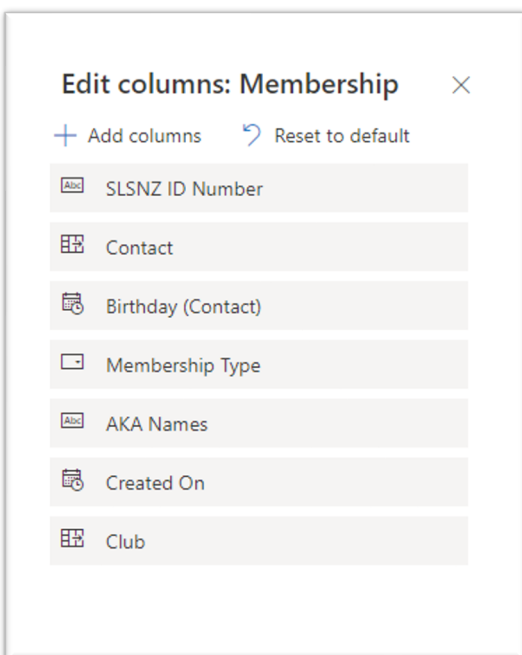
5.	User	CRM	The screen will then refresh with the new column(s) added at the end.

SLSNZ ID Number	Contact ↑	Birthday (Contact)	Membership Type	AKA Names	Created On	Club
142472	Dave Grohl	13/01/1969	Primary Membership		15/08/2023 3:48 pm	Titahi Bay SLSC

Active Membership* ˅

Edit columns   Edit filters   % grohl

Related tab

When you are viewing information, sometimes there is a tab named Related with a downward arrow next to it.
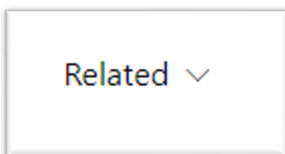
This arrow means there is another menu that you can access.

All options in this menu relate to the item you are viewing. For example, when viewing a person's Membership, I can view each of these options without having to do another search.

Setting default views

When you first log in to the CRM, the views on each screen may not be what you are used to. For example, Contacts may default to My Active Contacts rather than Active Contacts.

To change this, click the down arrow next to the heading:

My Active Contacts ⌄

Full Name ↑ ⌄
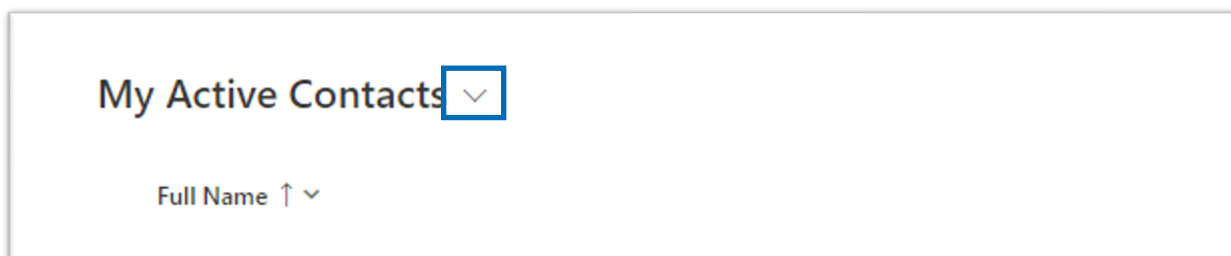
Select the view you want to use.

🔍 Search views

Active Club Members

Active Club Members with Current Qualifications

Active Contacts

Active Contacts Subgrid View

Active Contacts with No Family Link

ADX Admin Portal : Active Club Contacts

ADX Admin Portal : Active Members in My Club

ADX Admin Portal : Inactive Club Contacts

ADX Member Portal : My Family Contacts

All Contacts

Club Administrators Pending Portal Invite

Club Member Competition Award Information

Club Members Pending Portal Invite

Contacts Being Followed

Once you have the view you want to use as your default, click the down arrow again, and now Set as Default View should be an option. Click it.

🔍 Search views

Active Club Members

Active Club Members with Current Qualifications

✓ Active Contacts

Active Contacts Subgrid View

Active Contacts with No Family Link

ADX Admin Portal : Active Club Contacts

ADX Admin Portal : Active Members in My Club

ADX Admin Portal : Inactive Club Contacts

ADX Member Portal : My Family Contacts

All Contacts

Club Administrators Pending Portal Invite

Club Member Competition Award Information

Club Members Pending Portal Invite

Contacts Being Followed

Contacts I Follow

Contacts Referred to SLS NZ

Contacts: Influenced Deals That We Won

Contacts: No Campaign Activities in Last 3 Months

Contacts: Responded to Campaigns in Last 6 Months

EnterNOW - Active Club Members

EnterNOW - Active Club Members - Recently Modified

Excluded Contacts Campaigns

First Aid Members

🗗 Set as default view

🗗 Manage and share views

Membership Module

Dashboards

Security role required:	_SLS – Admin Level 1 (Club) OR _SLS-Admin Level 2 (Regional)

Points to note:
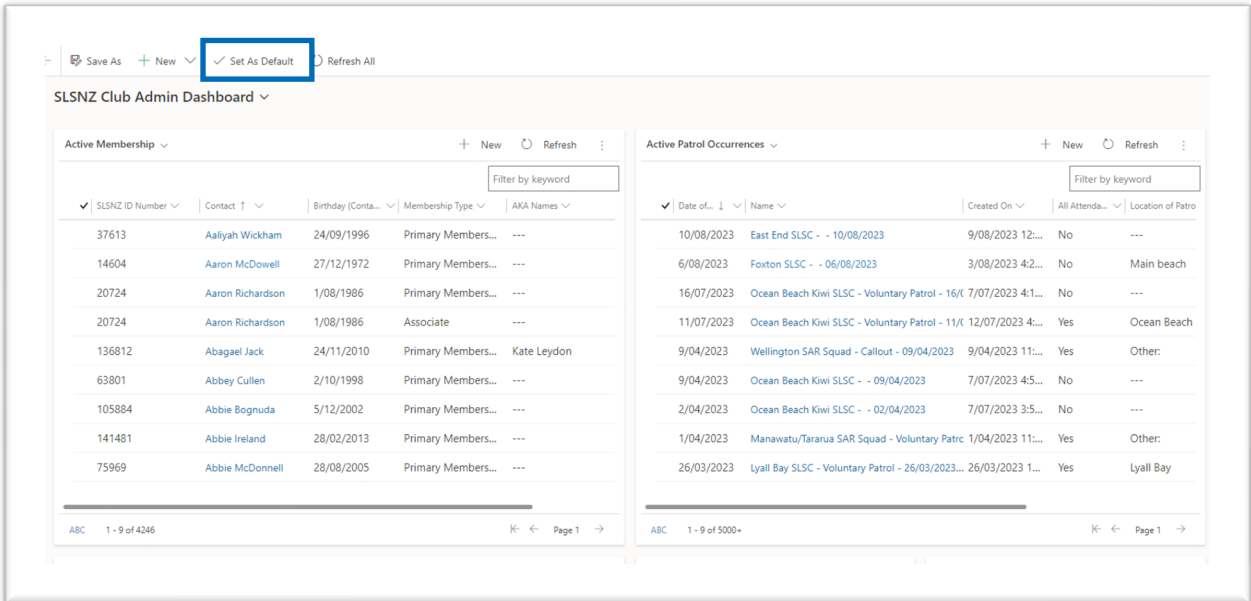
As a club or regional admin, you do not have the access to be able to create a new dashboard, but there are a number you can choose from. Among those is the SLSNZ Club Admin Dashboard which shows you:

- Active membership (in your club or region)
- Active patrol occurrences (in your club or region)
- Unprocessed transfers in and out

SELECT A DASHBOARD AS YOUR HOMEPAGE

If you find a dashboard you want to review regularly, you can set it as your home page.

Step	Person	System	Step
1.	Admin	CRM	In the Membership module, select Dashboards
2.	Admin	CRM	Find the dashboard you want to save
3.	Admin	CRM	Click Set as Default

4.	Admin	CRM	Now, when you click the Home button, this dashboard will be displayed
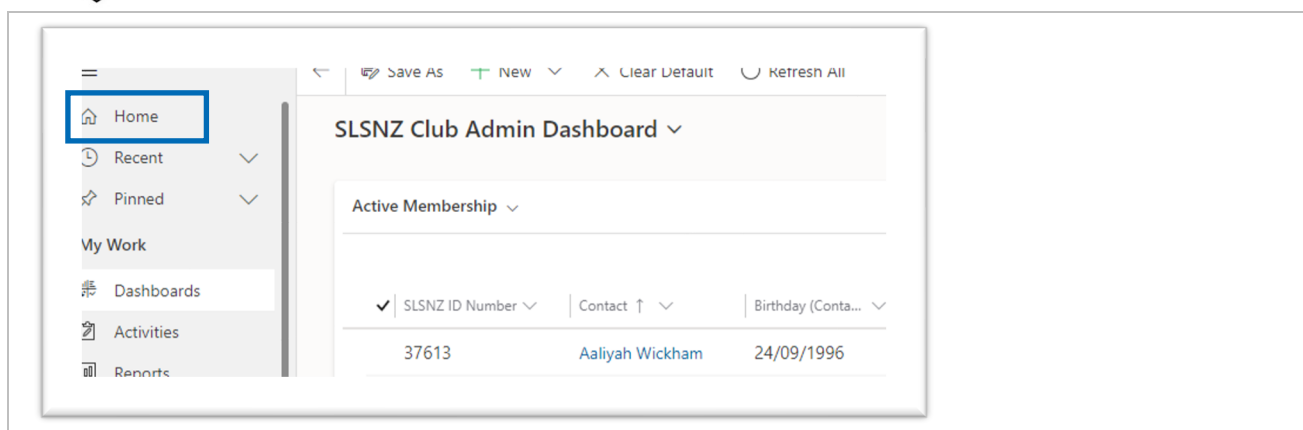
REMOVE A DASHBOARD FROM YOUR HOME PAGE

Step	Person	System	Step
1.	Admin	CRM	When you are on your Home page, click Clear Default.
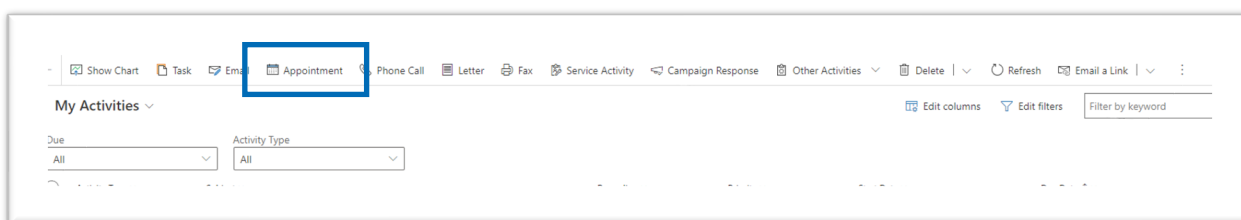
Activities

Security role required:	_SLSNZ – Admin Level 1 (Club) OR _SLSNZ-Admin Level 2 (Regional) OR _SLSNZ Base Role
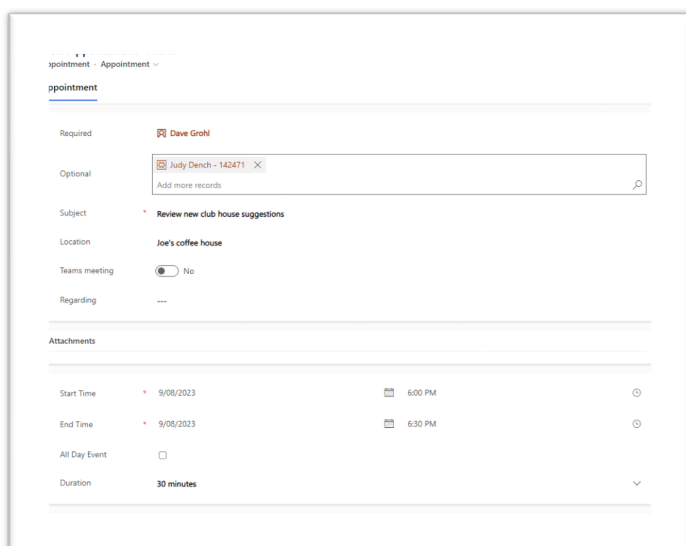
Points to note:
1. You will only have access to the Activities that you create or are assigned to you.
2. An Activity is a record of an interaction. They are not linked to a member.

CREATE AN ACTIVITY
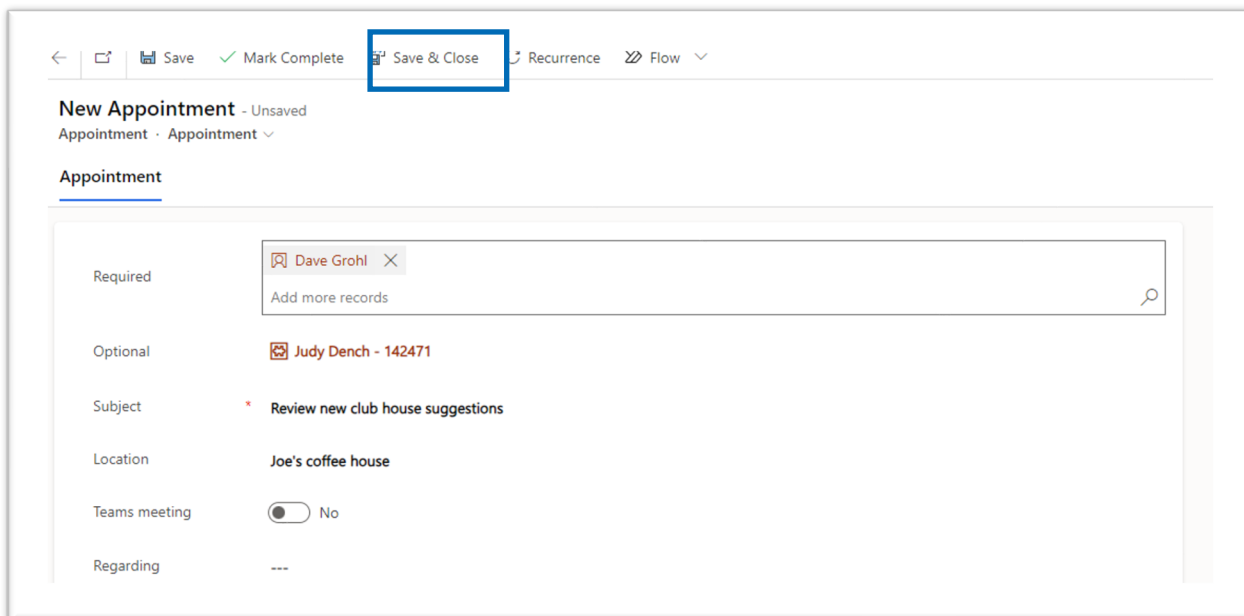
Step	Person	System	Step
1.	Admin	CRM	In the Membership module, go to Activities. This will default to All Activities, but you can change the default to My Activities if you wish.
2.	Admin	CRM	Listed at the top of the screen are the types of activities you can create. Select one. This example uses *Appointment*.

Step	Person	System	Step
3.	Admin	CRM	Only the mandatory fields need to be filled in, but it is recommended you complete as much detail as required to remember the details of the activity.

4.	Admin	CRM	When you have entered all the data, click Save and close.
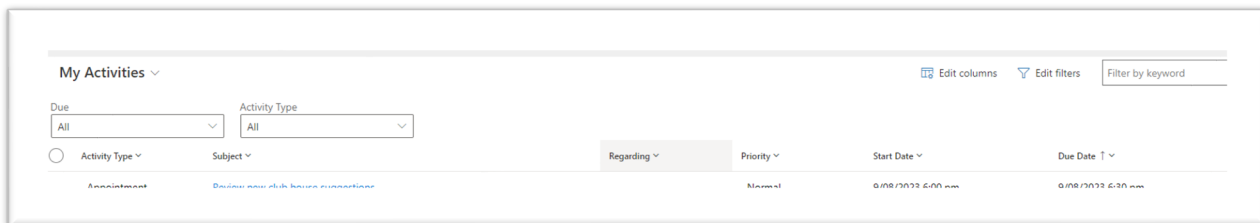
5.	Admin	CRM	The activity will now appear in the My Activities filter. If you have activities on your Dashboard, it will appear there as well.
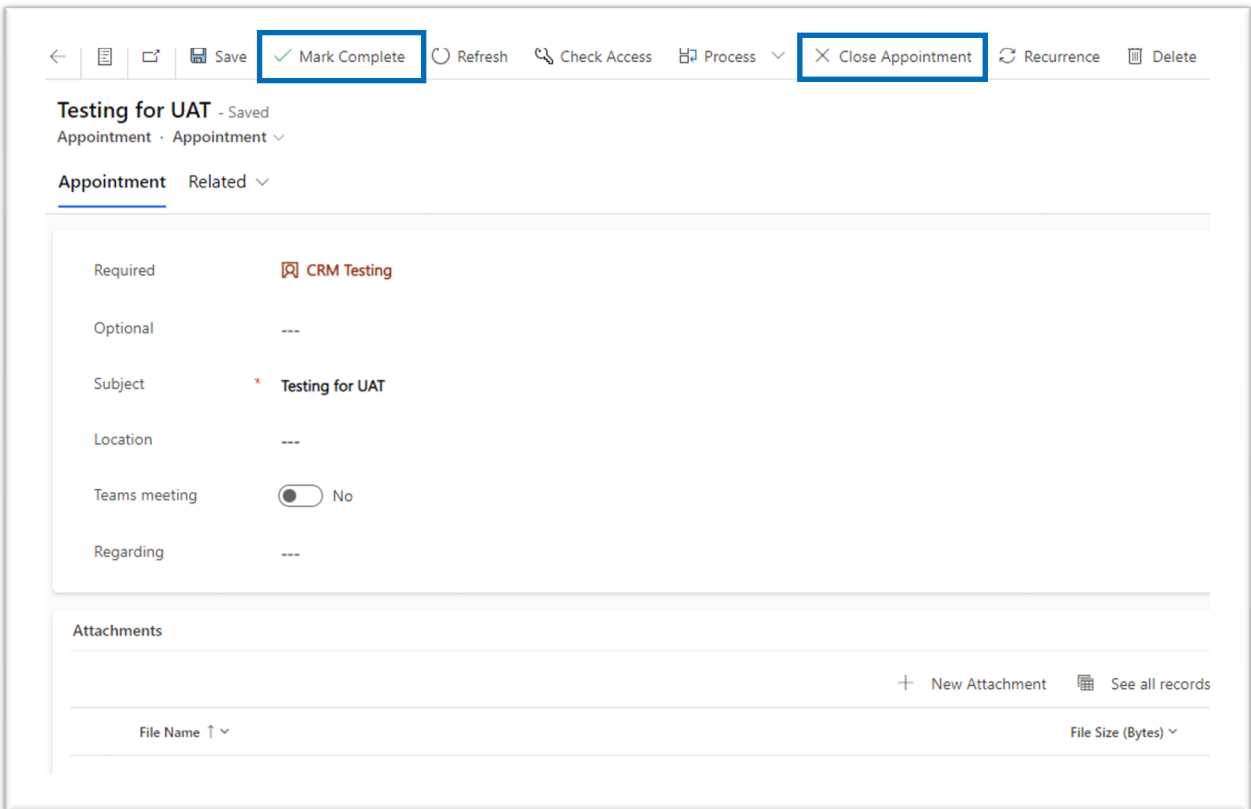
MARK AN ACTIVITY COMPLETE

Step	Person	System	Step
1.	Admin	CRM	In the Membership module, go to Activities. This will default to All Activities, but you can change the default to My Activities if you wish.
2.	Admin	CRM	Open the activity you want to close by clicking on the name (it is blue and underlined)
3.	Admin	CRM	Update the record with any information you need to record.
4.	Admin	CRM	Click Mark Complete or Close Appointment

Step	Person	System	Step
5.	Admin	CRM	The appointment will now be marked as Read Only, and the status will update to Completed. The activity will also be removed from *My Activities.*

![Surf Life Saving New Zealand logo]

Reports

Security role required:	_SLSNZ – Admin Level 1 (Club) OR _SLSNZ Base Role
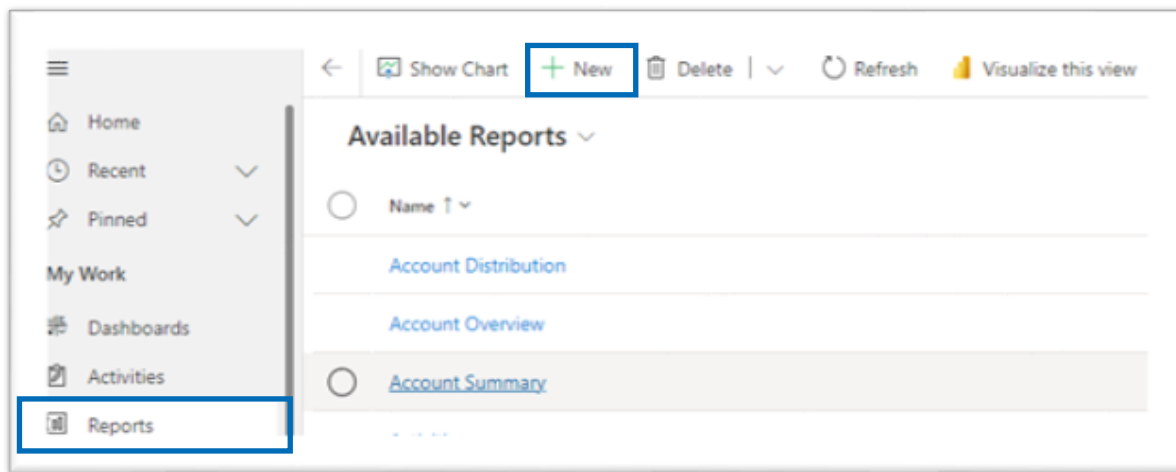
Points to note:
1. Your access allows you to create and run your own reports.
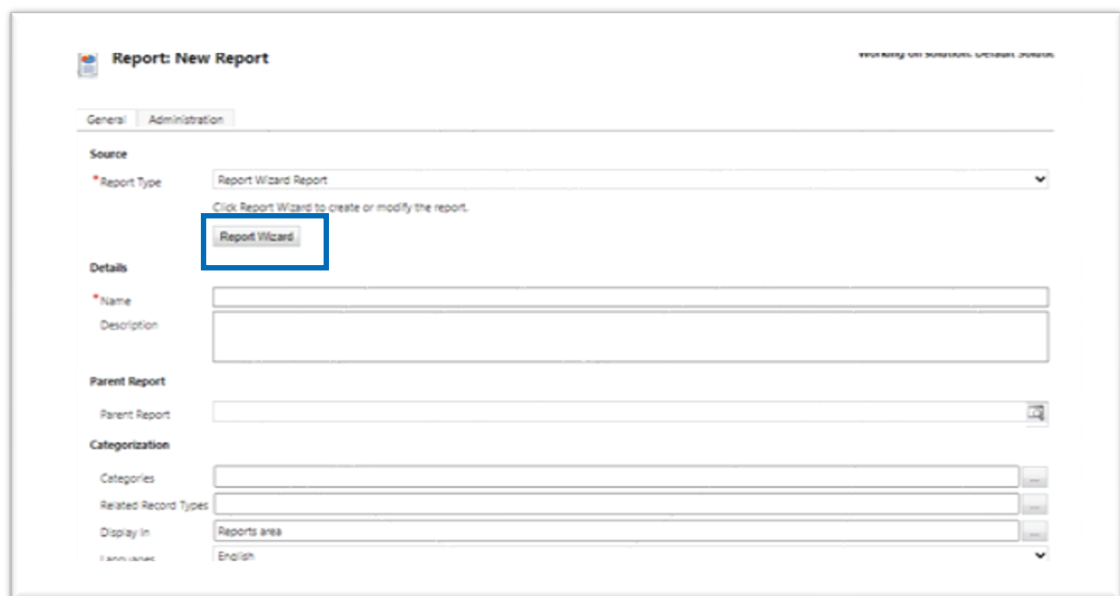
CREATE A NEW REPORT
You only need to do this once. Once you have the report available, you can just run it when required.

Step	Person	System	Step
1.	Admin	CRM	In the Membership module, select Reports. Click +New.

2.	Admin	CRM	Click Report Wizard

3.	Admin	CRM	Give your report a name

Select your Primary Record Type. This report is to be based around the clubs and the season they have active in the CRM, so I have selected *Clubs*. Then click Next

Report Properties

Enter the name and description of the report, and specify which record types the report will use.

Specify the name and description of the report

Report name: *   Club rollover report

Report description:

Specify the record types to include in this report

Your choice for primary record type will determine which related record types can be included.

Primary record type: *   Clubs

Related record type:

Back   Next   Cancel

4.	Admin	CRM	Add the fields you want the report to pull data from.

  o   If you want all the data in that field, select *Contains Data.*
  o   If you just want a report to show specific information, select *Equals* and then tell the report what information you want from those fields.
Then click Next.

Select Records to Include in the Report

Select a view, or define criteria. This will become the default filter for the report.

Report Filtering Criteria

Clubs

Use Saved View: [new]

Clear | Group AND Group OR
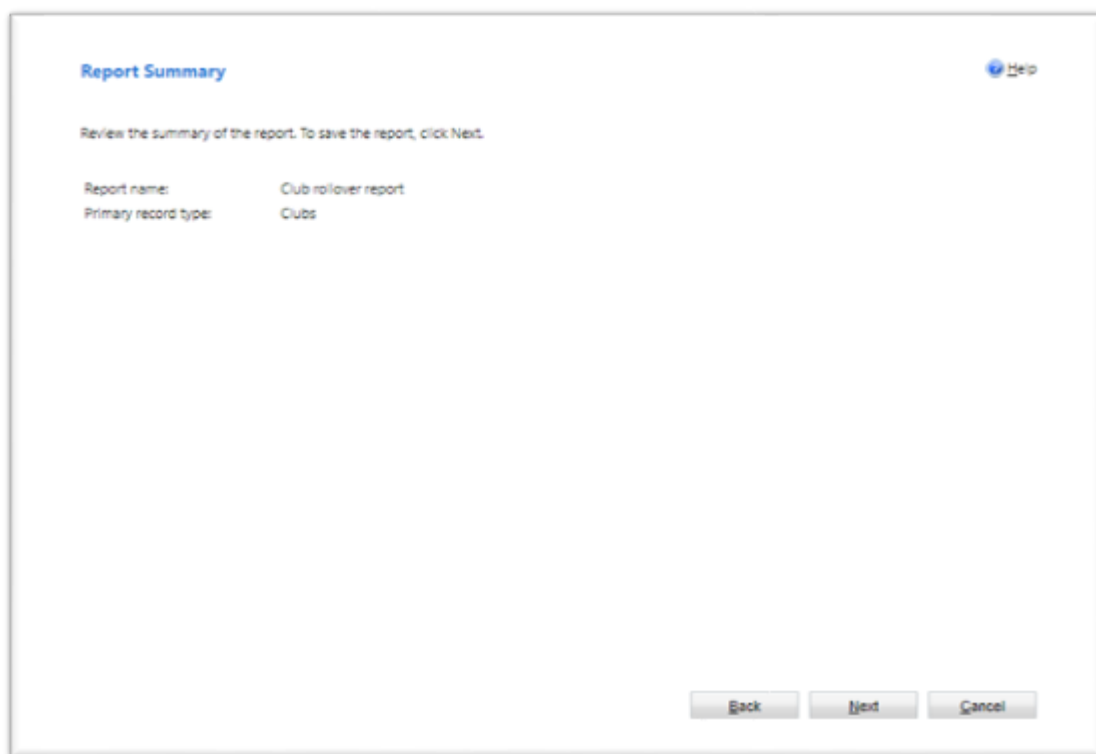
∨ Region   Equals   Central Region/Eastern Regi...
∨ Club   Contains Data
∨ Current Season   Contains Data
∨ Run End of Season   Contains Data
∨ Run Start of Season   Contains Data
   Select

Back   Next   Cancel

5.	Admin	CRM	Specify the order of columns in the report. Click Next.

6.	Admin	CRM	Select the preferred format. Click Next.

7.	Admin	CRM	Click Next.
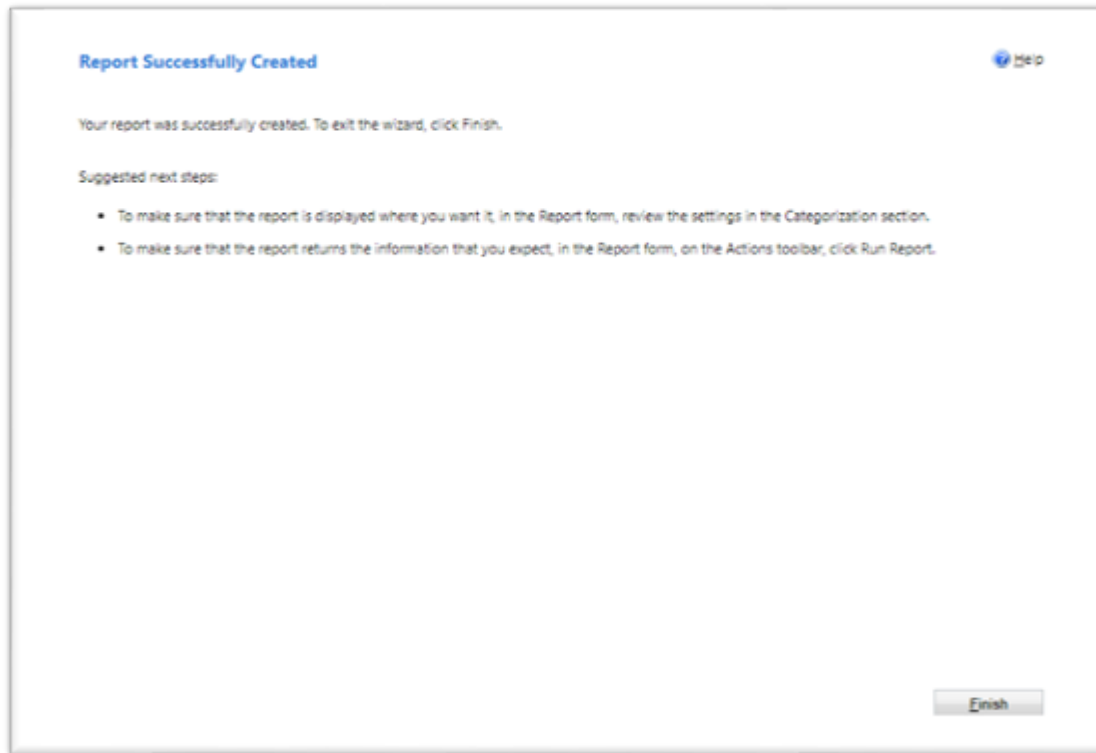
Report Summary   Help

Review the summary of the report. To save the report, click Next.

Report name: Club rollover report
Primary record type: Clubs

Back   Next   Cancel

8.	Admin	CRM	Click Finish

Report Successfully Created   Help

Your report was successfully created. To exit the wizard, click Finish.

Suggested next steps:

- To make sure that the report is displayed where you want it, in the Report form, review the settings in the Categorization section.
- To make sure that the report returns the information that you expect, in the Report form, on the Actions toolbar, click Run Report.

Finish

9.	Admin	CRM	Either click:

				o Run Report – if you want to see the output to ensure you configured it right o Save and Close – when you are happy with the new report.

Clubs

Security role required:	_SLSNZ – Admin Level 1 (Club) OR
	_SLSNZ – Admin Level 2 (Regional) OR
	_SLSNZ Base Role

Points to note:
1. The Clubs page displays SLSNZ clubs.
2. Your security role provides access to Clubs within your business unit. This means:
   - If your Business Unit is an individual club, you will have the access to view and edit your club
   - If your Business Unit is a Region, you will have the access to view and edit all clubs within your region.
3. If you don't have access, you will see a grey Read Only banner across the top.

🔒 Read-only: You don't have access to edit this record.

UPDATE A CLUB
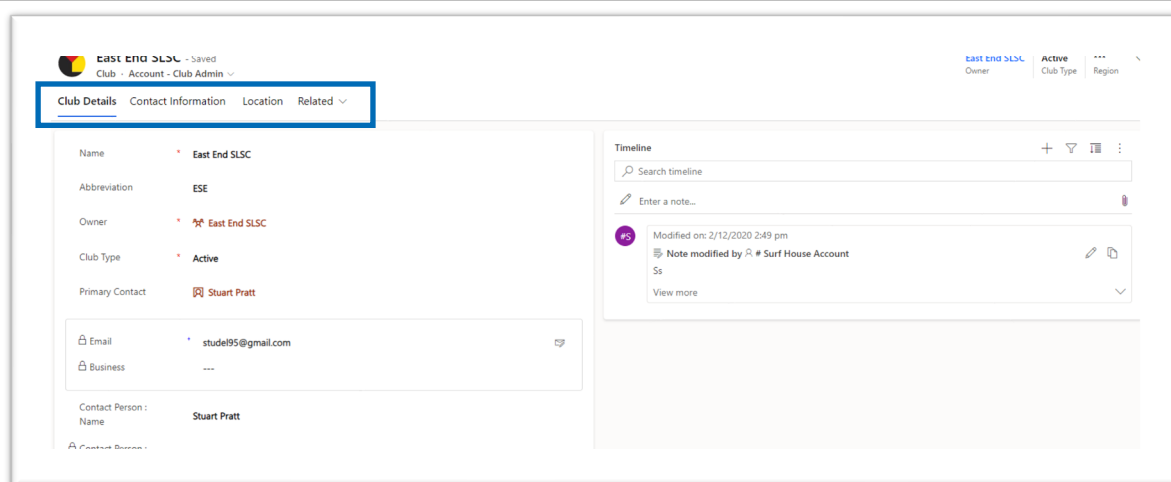
Step	Person	System	Step
1.	Admin	CRM	In the Membership module, select Clubs and click on the Club you want to edit.
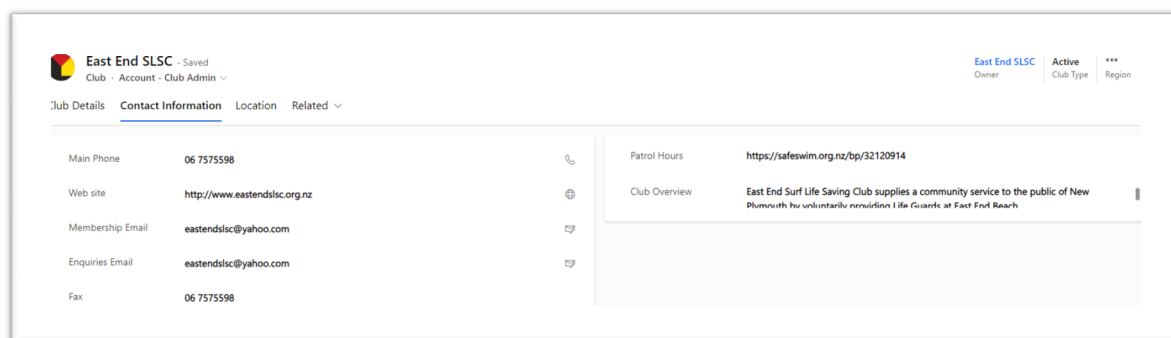
2.	Admin	CRM	In the Membership module, select Clubs and click on the Club you want to edit. The Club Detail tab will display basic info about the club. Other information can be found on the other tabs at the top, or by clicking on the arrow next to the Related tab.

3.	Admin	CRM	The information displayed on the Contact Information and Location tab is shown on the website
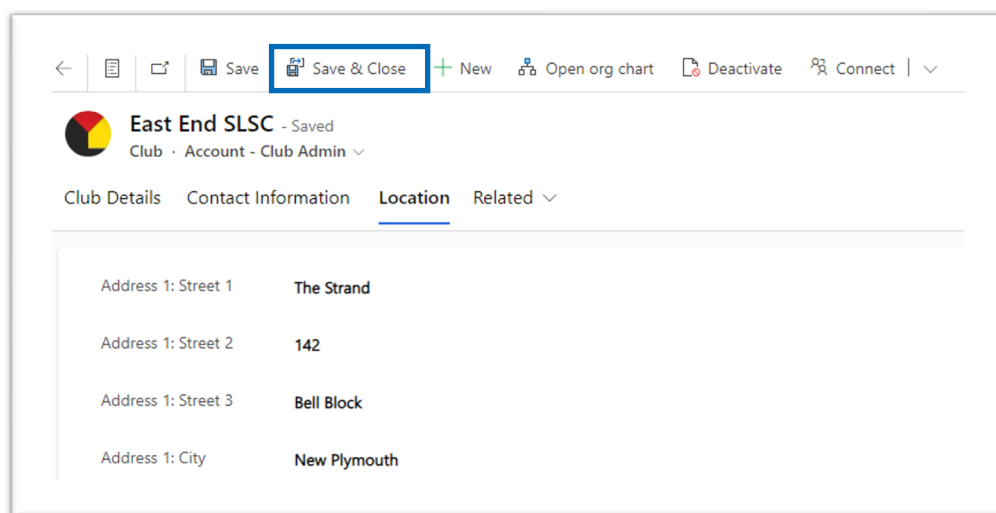
Contact Info tab

Website

| 4. | Admin | CRM | Make your update, then click Save and Close. The update will be made to the website within 24hrs. |
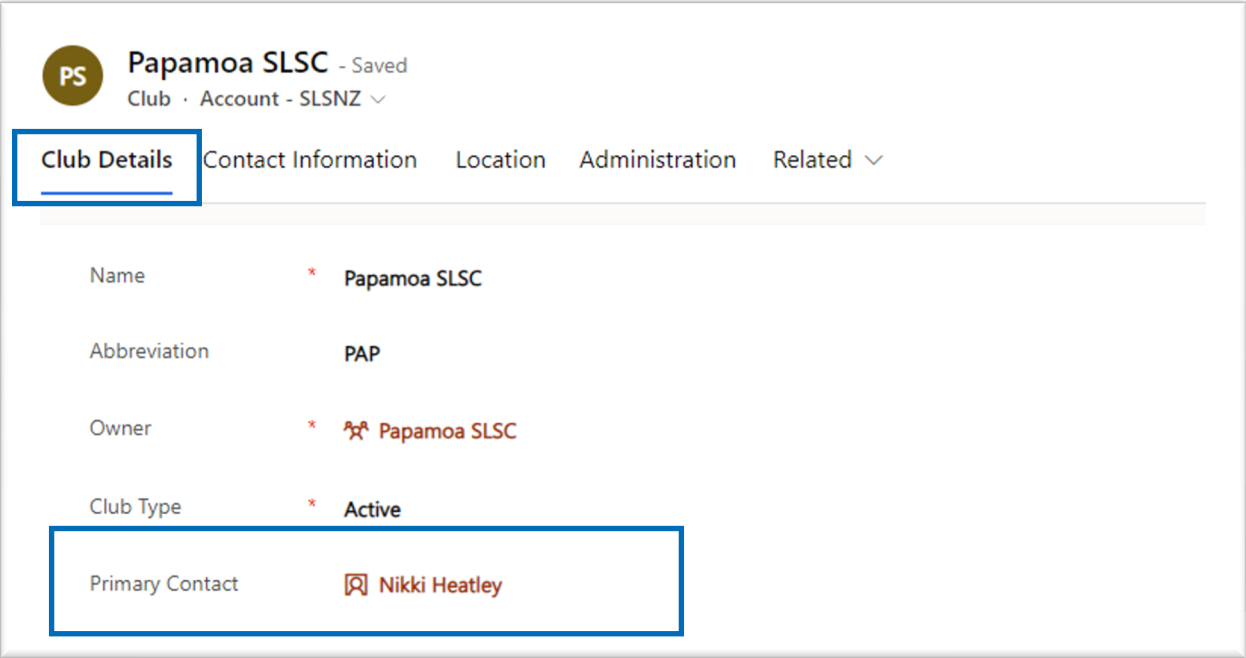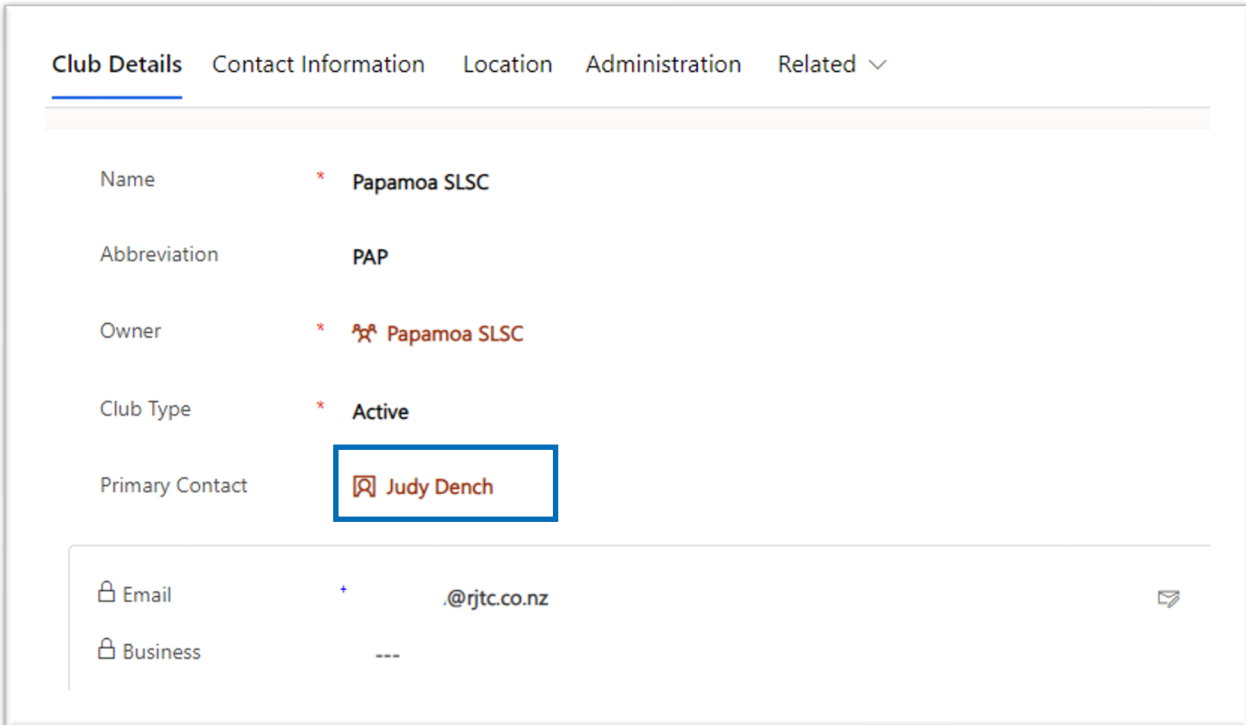
UPDATE THE PRIMARY CONTACT
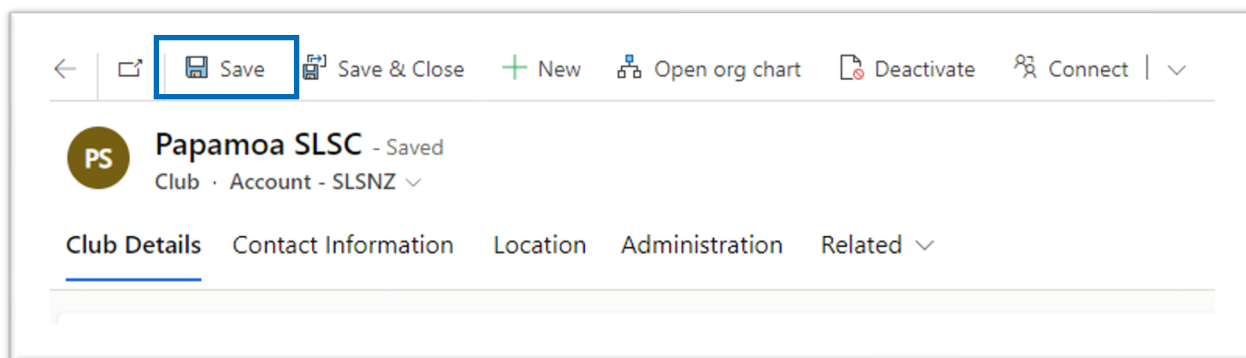
1.	Admin	CRM	The Primary Contact is located on the Club Details tab

2.	Admin	CRM	Click in the Primary Contact box (which appears when you hover over the name) and remove the existing name. Then type in the name of your new Primary Contact. You will note that the locked Email field will update with the member's email address.

3.	Admin	CRM	Click Save
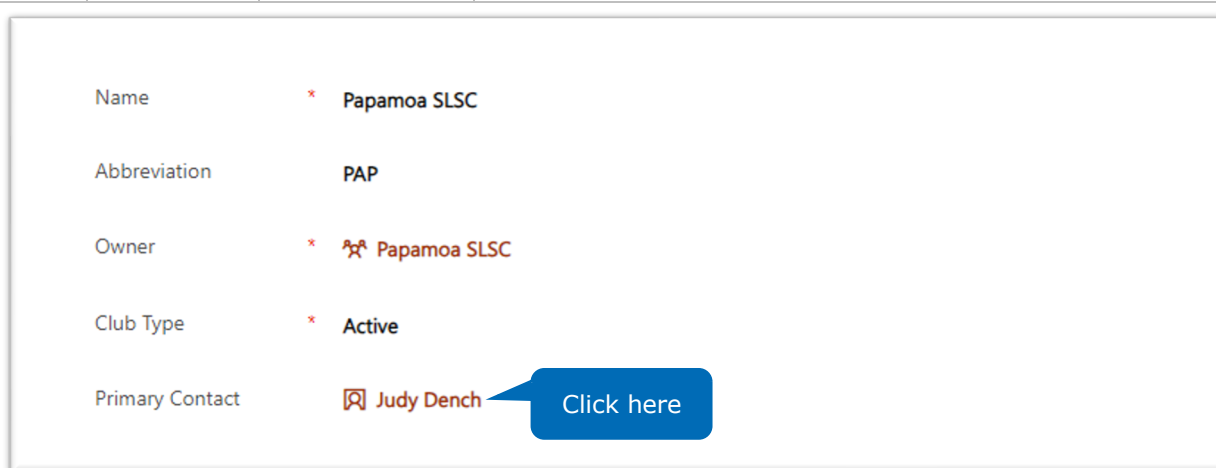
4.	Admin	CRM	Click on the new contact's name to go to the Contact screen
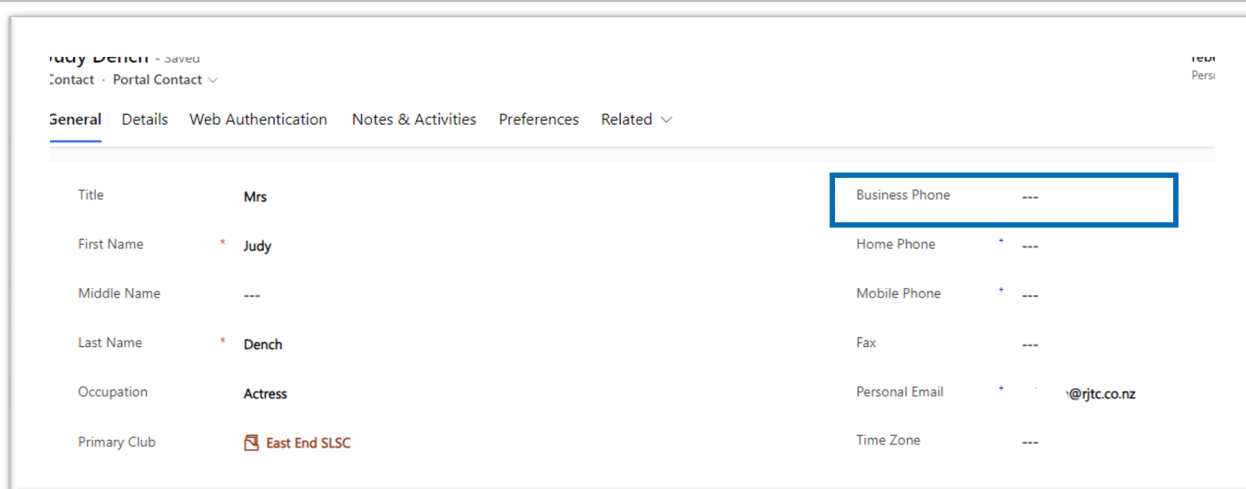
4.	Admin	CRM	If necessary, update the contact's Business Phone to that of the club as this will display on the club page. Then click Save. (This will not update the Main Phone field for the club.)

Contacts

Security role required:	_SLSNZ – Admin Level 1 (Club) OR _SLSNZ – Admin Level 2 (Regional) OR _SLSNZ Base Role

Points to note:
1. You should have no need to create a new contact. A Contact is created by the system when a new membership is created. To see this process, go to Membership Applications
2. A person should only have one Contact record. (However, they may have multiple memberships.)
3. The Contact record is linked to the club where the primary membership is held.
4. Your security role provides access to Contacts within your business unit. This means:
    a. If your Business Unit is an individual club, you will have the access to view and edit all the Contacts from your club
    b. If your Business Unit is a Region, you will have the access to view and edit all Contacts from the clubs within your region.
5. If you don't have access, you will see a grey Read Only banner across the top.

QUALIFICATIONS

Qualifications are linked to the Contact. This means that only the Primary club can see a member's qualifications.

AWARDS

Awards are linked to the Contact. Only the primary club can see a member's qualifications

Membership

Security role required:	_SLS – Admin Level 1 (Club) OR _SLS - Admin Level 2 (Regional) OR _SLS – Base Role

Points to note:
1. You should have no need to create a new membership. A Membership is created by the system when a new membership application is created. To see this process, go to Membership Applications
2. A person may have multiple memberships.
   a. The person may only have one Primary membership, this is the club they compete with.
   b. The person may have additional secondary or associate memberships.
3. Your security role provides access to Members within your business unit. This means:
   a. If your Business Unit is an individual club, you will have the access to view and edit all the Members from your club
   b. If your Business Unit is a Region, you will have the access to view and edit all Members from the clubs within your region.
4. You will only be able to see the Members you have access to.

MEMBERSHIP

The Membership screen gives you access to information relating to the person's membership with your club, including their subscription status and the number of patrol hours they completed.

There are links to further information related to the membership which can be accessed by clicking the down arrow next to Related:
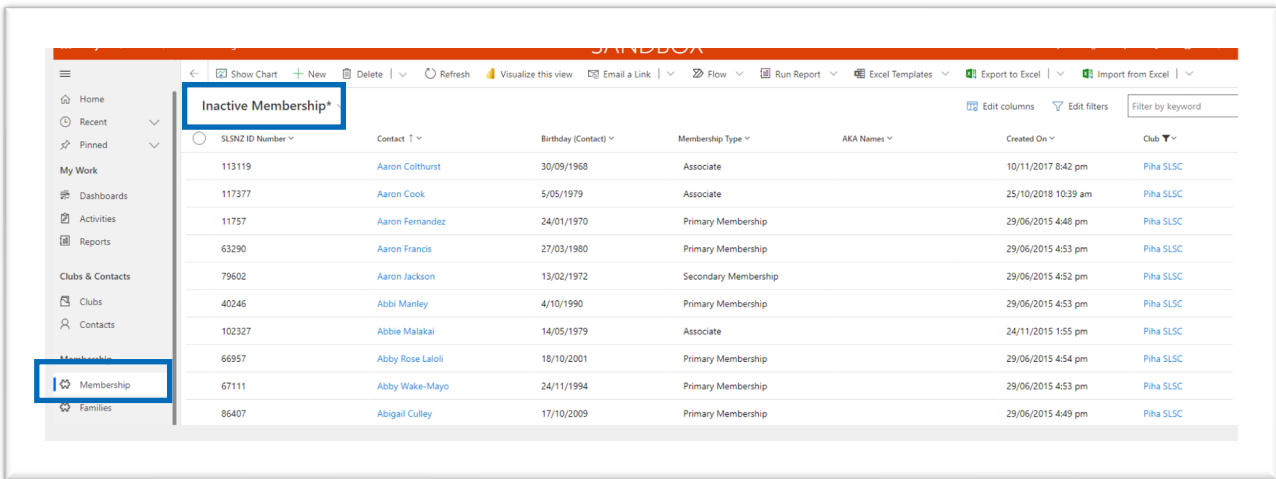
RENEW A MEMBERSHIP IN THE CRM
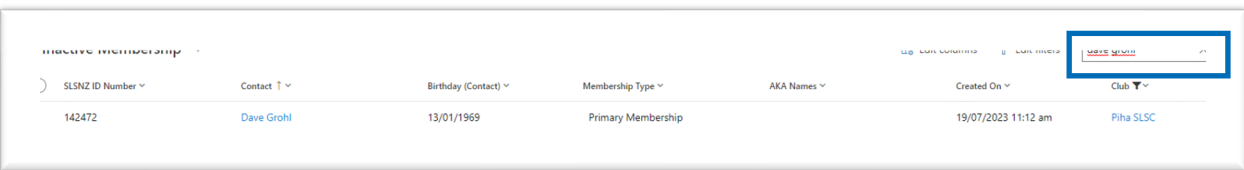
If an existing member wants to return this season and become an active member you need to find their inactive membership record and roll it over into the current season.

Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role
Prerequisites	Member must exist
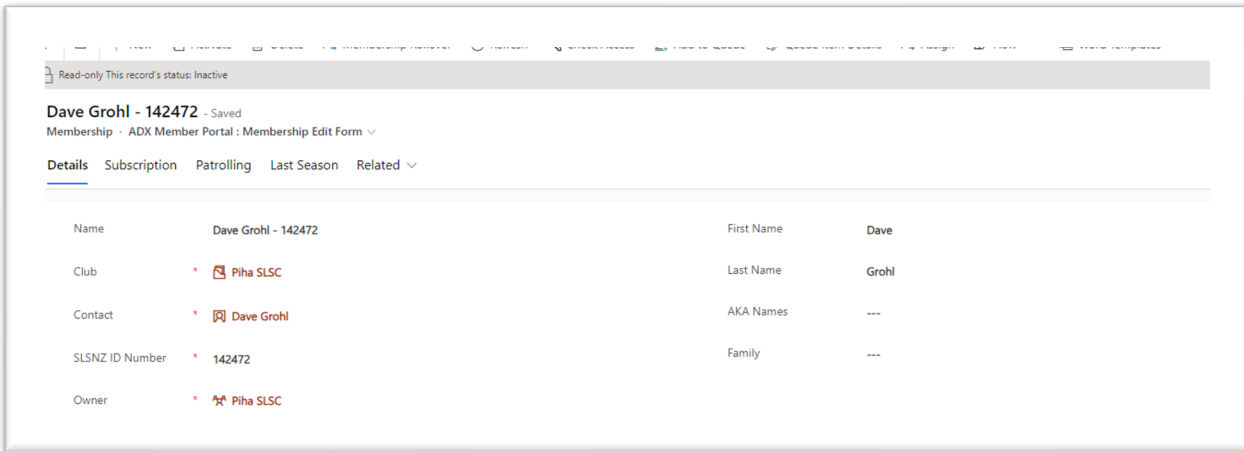
Step	Person	System	Step
1.	Member	N/A	Makes request to renew
2.	Club admin	CRM	In the CRM Membership module, go to Memberships and filter by Inactive Memberships.

| 3. | Club admin | CRM | Use the search option to find the record you want to make active |

| 4. | Club admin | CRM | Double click on the record to open it |

5.	Club admin	CRM	Select Membership Rollover

6.	Club admin	CRM	Confirm the request

7.	Club admin	CRM	The member will now appear under Active Memberships

Applications

Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role
Post requisites	Renew a membership in the CRM If an existing member wants to return this season and become an active member you need to find their inactive membership record and roll it over into the current season.

Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role
Prerequisites	Member must exist

Step	Person	System	Step
1.	Member	N/A	Makes request to renew
2.	Club admin	CRM	In the CRM Membership module, go to Memberships and filter by Inactive Memberships.

Step	Person	System	Step
3.	Club admin	CRM	Use the search option to find the record you want to make active

Step	Person	System	Step
4.	Club admin	CRM	Double click on the record to open it

| 5. | Club admin | CRM | Select Membership Rollover |

| 6. | Club admin | CRM | Confirm the request |

7.	Club admin	CRM	The member will now appear under Act Memberships

7

Points to note:
1. A Contact can have multiple Membership records associated to it as they could be a member of multiple clubs.
2. The Membership Regulation requires a member to have no more than one primary membership. This is the club that they compete with.
3. A member can have multiple secondary memberships, but these memberships can only be used for patrolling (not competing).
4. The process documented below only applies to Primary Memberships. Click here to go to: Secondary memberships

MEMBERSHIP APPLICATIONS

Step	Person	System	Step
1.	Applicant	Member Portal	Open member portal https://memberportal.surflifesaving.org.nz/
2.	Applicant	Member Portal	Select *Join Surf* from the navigation bar

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7 This process needs to be done by a System Administrator.

Step	Person	System	Step

3.	Applicant	Member Portal	Complete the application form

4.	Applicant	Member Portal	Click the *Submit* button at the bottom of the form to submit application
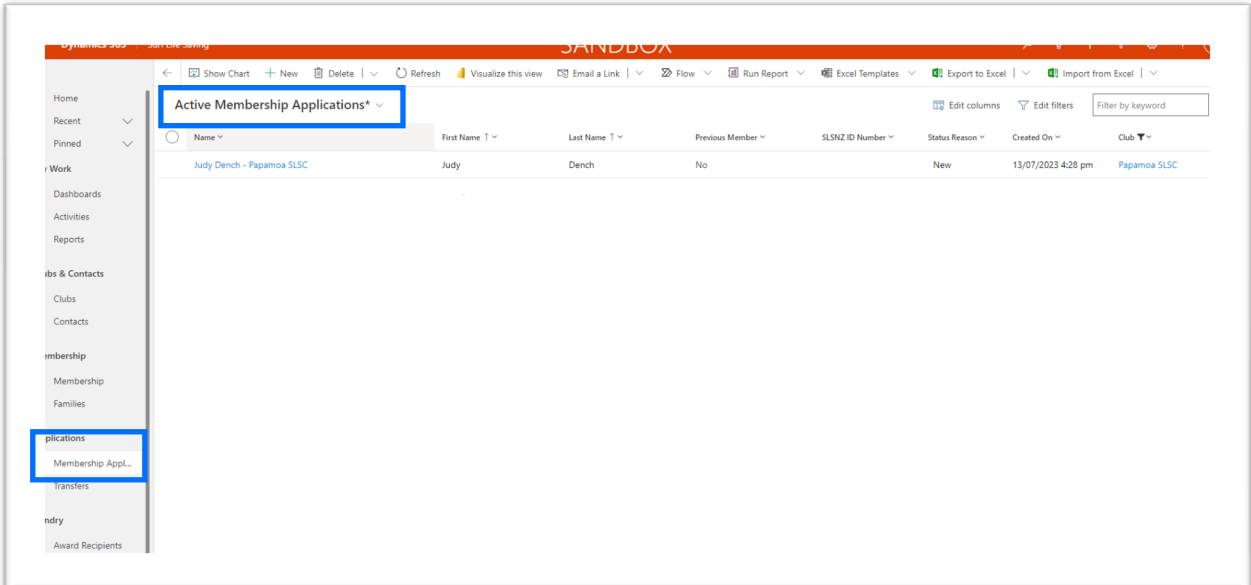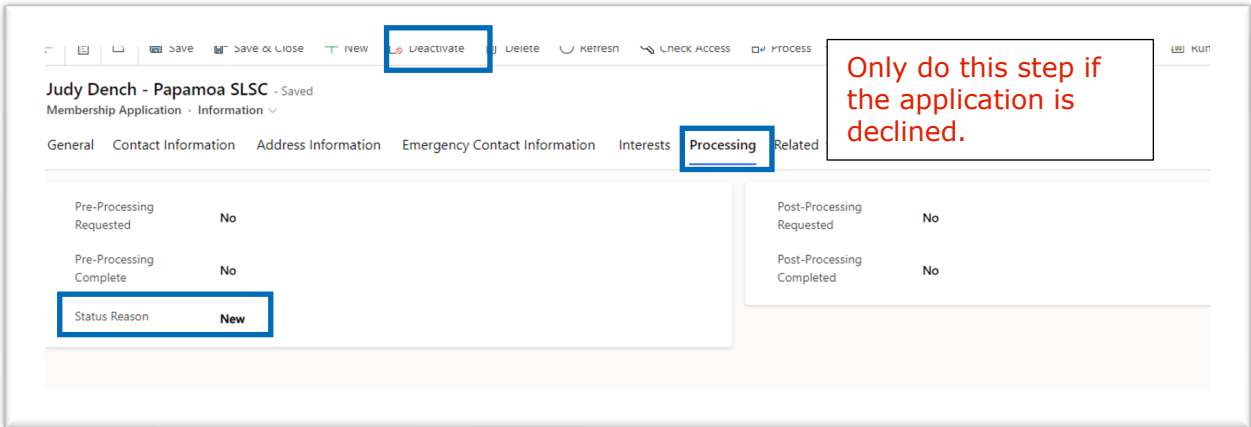
5	*Workflow*	*CRM*	*Create new Membership Application record*
6.	Club admin	CRM	Locate membership application. Go to Membership Module > Membership Applications > Active Membership Applications Double click on the record to open it.

7.	Club admin	CRM	Complete checks. Ensure the member does not already exist in CRM. Does the member exist already?

If	Then
Yes	Contact the member to ascertain whether they want to Transfer a member or request a Secondary memberships.
No	Go to step 8

8	Club admin	CRM	Is the application approved?

If	Then
Yes	Go to step 9
No	Go to the processing tab and change the Status Reason to Cancelled
Then click Deactivate to remove the record from the Active list.
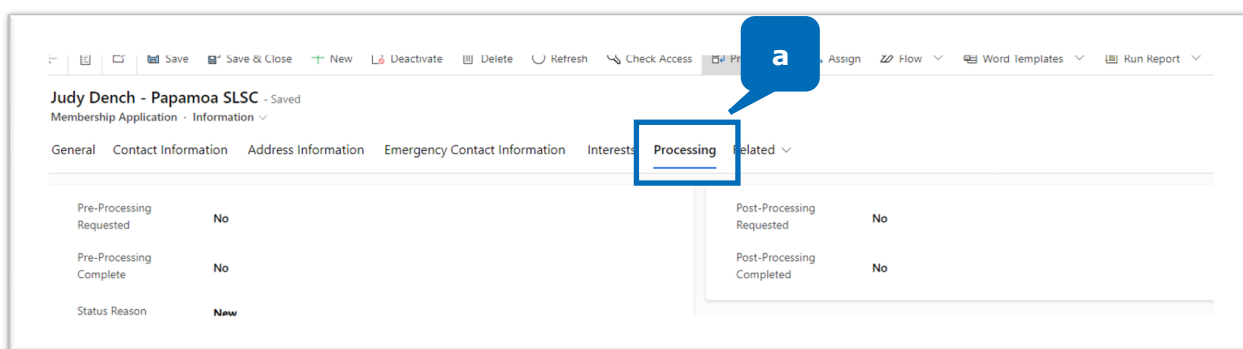
Only do this step if the application is declined.

9.	Club admin	CRM	Update the processing screen
			a. Click on the *Processing* tab
			b. Change the *Status Reason* to Post Processed
			c. Change the *Post Processing* Requested to Yes (this starts the workflow to create the Contact and Membership)
			d. Change the *Post Processing* Completed to Yes
			e. Click *Save*
			f. Then click *Deactivate* to remove the record from the Active Applications.

10.	Workflow	CRM	The system creates new Contact record in the Membership module

11.	Workflow	CRM	The system creates a new Primary Membership record in the Membership Module, and assigns a membership number

SECONDARY MEMBERSHIPS

Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role
Prerequisites	Member must exist in the CRM already

Points to note:
1. A member can have multiple secondary memberships.
2. If a member has one primary membership already (it does not need to be active in the CRM), and want to join another club, they either need to transfer their primary membership (if they intend to compete for the new club) or apply for a secondary membership if they just wish to patrol.
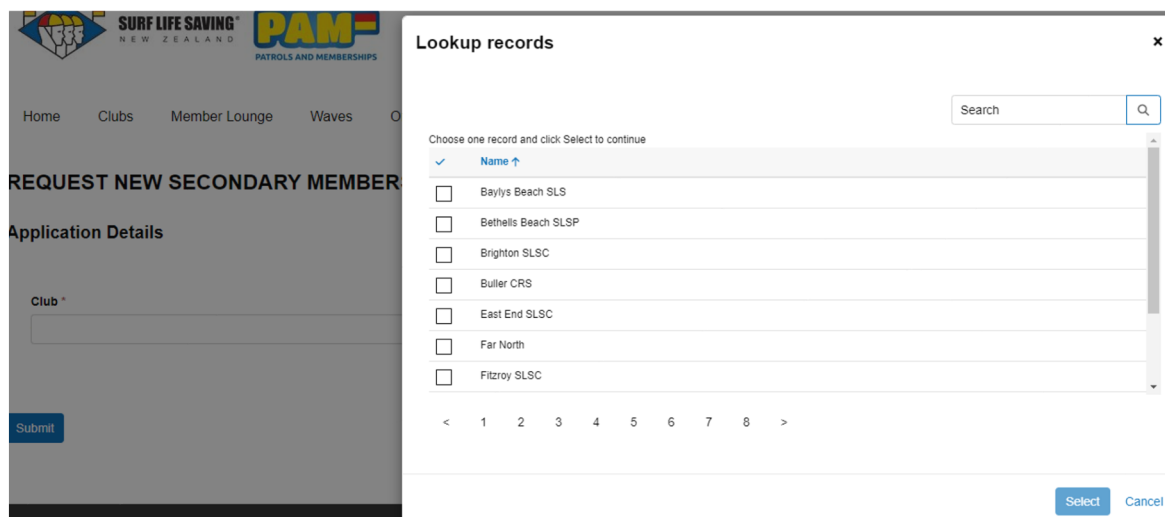
Step	Person	System	Step
1.	Applicant	Member Portal	Open member portal and logs in https://memberportal.surflifesaving.org.nz/
2.	Applicant	Member Portal	Go to Member Lounge > Membership Desk

Step	Person	System	Step
3.	Applicant	Member Portal	Select *Request New Secondary Membership*
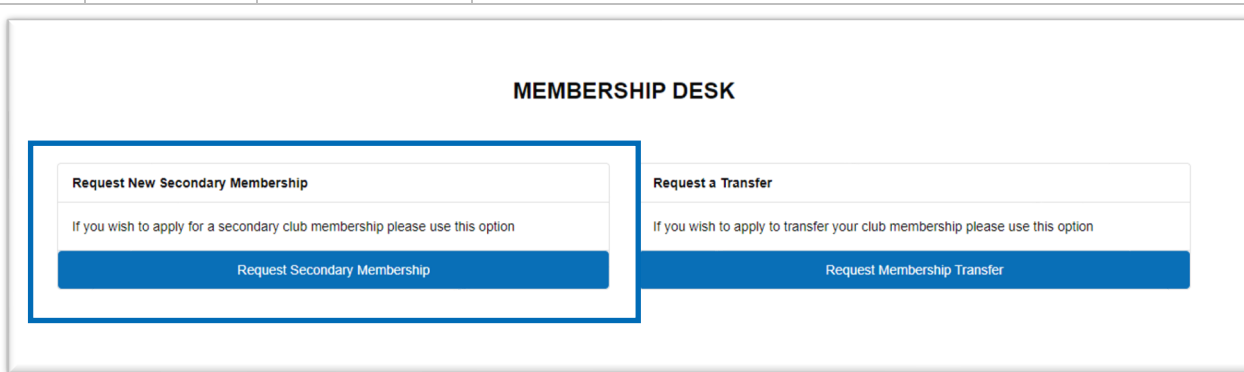
4.	Applicant	Member Portal	Click on the magnifying glass and select the club you wish to join

5.	Applicant	Member Portal	Click Submit

| 6. | Club Admin | CRM | In the CRM, go to Membership Applications and ensure Active Membership Applications are displayed. |

| 7. | Club Admin | CRM | Open the application. Ensure the member has selected a Secondary membership.
If they have requested a primary membership, follow **Error! Reference source not found.** |

8.	Club admin	CRM	Complete checks. Ensure the member does not already exist in CRM. Does the member exist already?

If	Then
Yes	Contact the member to ascertain whether they want to Transfer a member or request a Secondary memberships.
No	Go to step 9

9.	Club admin	CRM	Is the application approved?

If	Then
Yes	Go to step 10
No	Go to the Processing tab and change the Status Reason to Cancelled Then click Deactivate to remove the record from the Active list.

Only do this step if the application is declined.

10.	Club admin	CRM	Update the processing screen a. Click on the *Processing* tab b. Change the *Status Reason* to Post Processed c. Change the *Post Processing* Requested to Yes (this starts the workflow to create the Contact and Membership) d. Change the *Post Processing* Completed to Yes e. Click *Save* f. Then click *Deactivate* to remove the record from the Active Applications.

Note: You may need to go back to the *General* tab and fill out the Ethnicity. The user isn't asked for this when they request a second membership, but it is a mandatory field.

11.	Workflow	CRM	The system creates a new Secondary Membership record in the Membership Module.

TRANSFER A MEMBER IN THE CRM
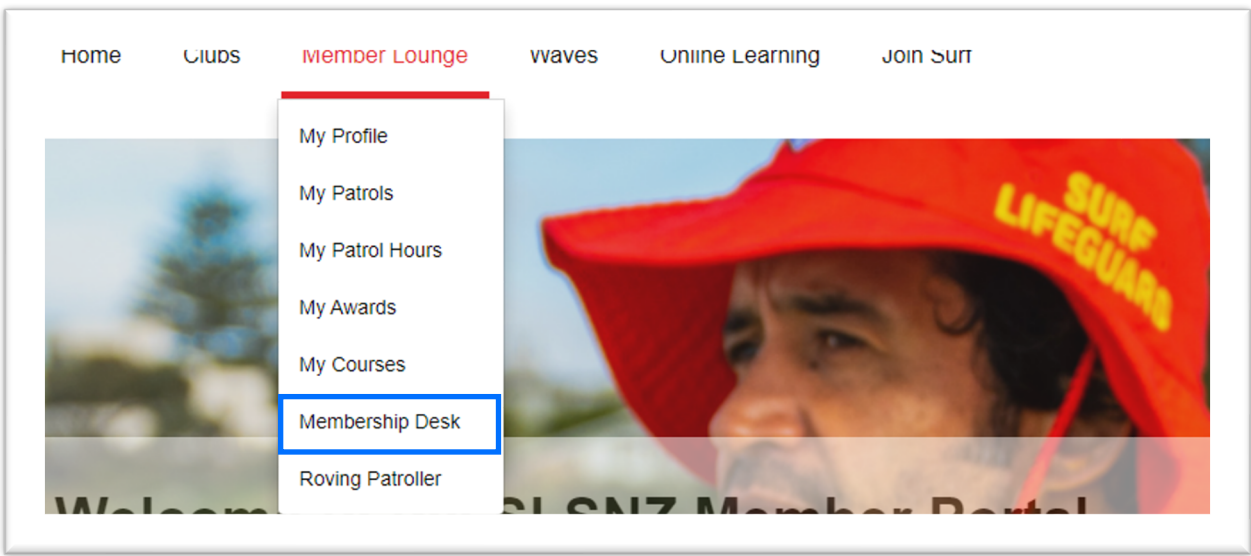
Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role
Prerequisites	Member must exist Both the "Leaving" and the "Joining" club administrators must have the appropriate security role.
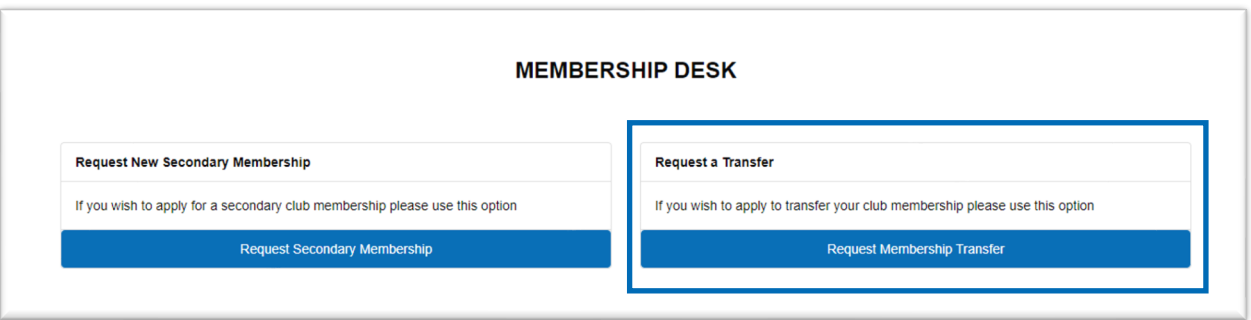
Points to note:
1. A Transfer is used when a member wants to change Primary club
2. Only one transfer per competition year is allowed. This is not controlled by the system.
3. Once a member is transferred, they become an active member of the new club, even if they were Inactive prior to the transfer.

Step	Person	System	Step
1.	Applicant	Member Portal	Open member portal and logs in https://memberportal.surflifesaving.org.nz/

Step	Person	System	Step
2.	Applicant	Member Portal	Go to Member Lounge > Membership Desk

Step	Person	System	Step
3.	Applicant	Member Portal	Select *Request Membership Transfer*

| 4. | Applicant | Member Portal | Click on the magnifying glass to select the destination club |

| 5. | Applicant | Member Portal | Filter the clubs and then tick the one you want to join. Then click Select. |

6.	Applicant	Member Portal	Click Submit

REQUEST A TRANSFER

General

Destination Club *

East End SLSC   × 🔍

Submit

7.	*Workflow*	*CRM*	*Send email to*
			- Existing club
			- Receiving club
			Notifying them of the request to transfer

8.	Club admin – existing club	CRM	In the CRM, go to the Membership module and select Transfers

Applications

🧩 Membership Appl...

🧩 Transfers

Sundry

🧩 Award Recipients

🧩 Non Patrol Hours

🧩 Club Season Mem...

🧩 Member Season P...

M Membership ⌄

9.	Club admin – existing club	CRM	Open the record. (Do not click on a blue link)

10.	Club admin – existing club	CRM	Click the Transfer Details tab

11.	Club admin – existing club	CRM	Review request, and when ready select *Approved* in the Transfer From Approval field. Then click Save & Close.

| 12. | Club admin – existing club | CRM | Now when the Receiving Club locates the record, they should see that the Transfer Status and the Transfer From Approved fields have updated |

| 13. | Club admin – receiving club | CRM | Open the record and click on the Transfer Details Tab |

| 14. | Club admin – receiving club | CRM | Review request, and when ready select *Approved* in the Transfer To Approval field. Then click Save & Close. |

| 15. | Workflow | CRM | The Transfer Status is marked as Complete |
| 16. | Workflow | CRM | The Transfer Request is marked as Deactivated. The request is removed from the Active Transfers. |

Note: If those final stages **cannot run** (the cause of this is usually that a membership for the new club already exists – a member has applied for a new membership mistakenly instead of doing only the transfer), the transfer will stay stuck at *Transfer to Approved* and when you look at the Contact record it will still have the original club in the Primary Club and Owner fields. It is a manual process to identify these errors; these can be identified by transfers marked as approved which are still appearing on the list of Active Transfers.

In this latest upgrade, we have requested the following:

- Remove the ability to "Join Surf" when you are logged in. The only options available should be to request a secondary membership or transfer a membership.
- Allow a user to Join Surf when not logged in.

Patrolling Module

Patrol Occurrences
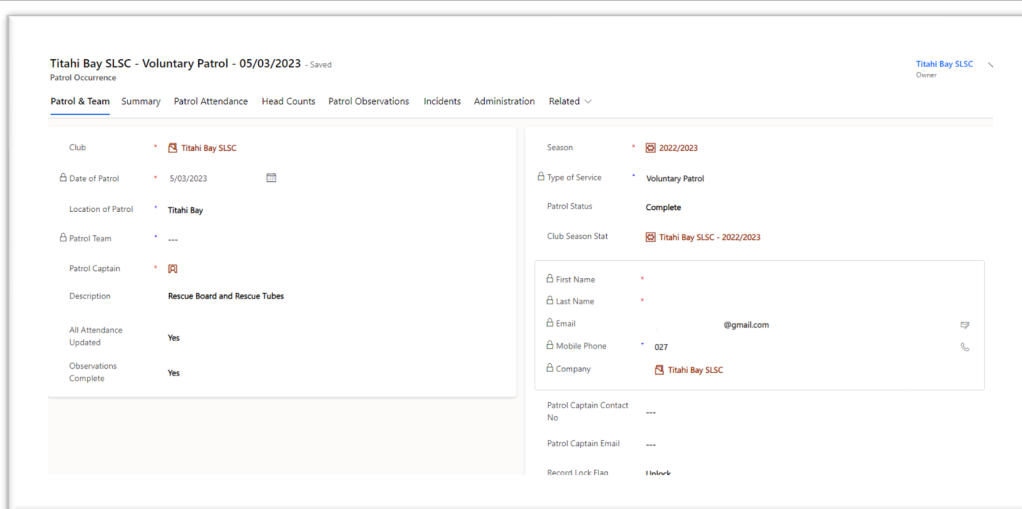
Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role

Points to note:

1. Patrol Occurrences should be created from Patrol Planning, not on this screen.
2. Use this screen to view any Planned or Completed patrol occurrences.

PATROL OCCURRENCE

Step	Person	System	Step
1.	Admin	CRM	In the Patrolling module, go to Patrol Occurrences and open the occurrence you want to view
2.	Admin	CRM	The Summary tab provides information about the surf and weather at the time of the patrol

3.	Admin	CRM	The Patrol Attendance tab gives you information about who was on patrol and what roles they played. (Names have been removed for privacy reasons.) Note that there may be more than one page of information, as highlighted in yellow.

4.	Admin	CRM	The Head Counts tab show the hourly count of people on the beach and in the water. Again, there may be more than one tab of data.

5.	Admin	CRM	The Patrol Observations tab tells you the equipment available and the actions taken (assists, preventions etc).
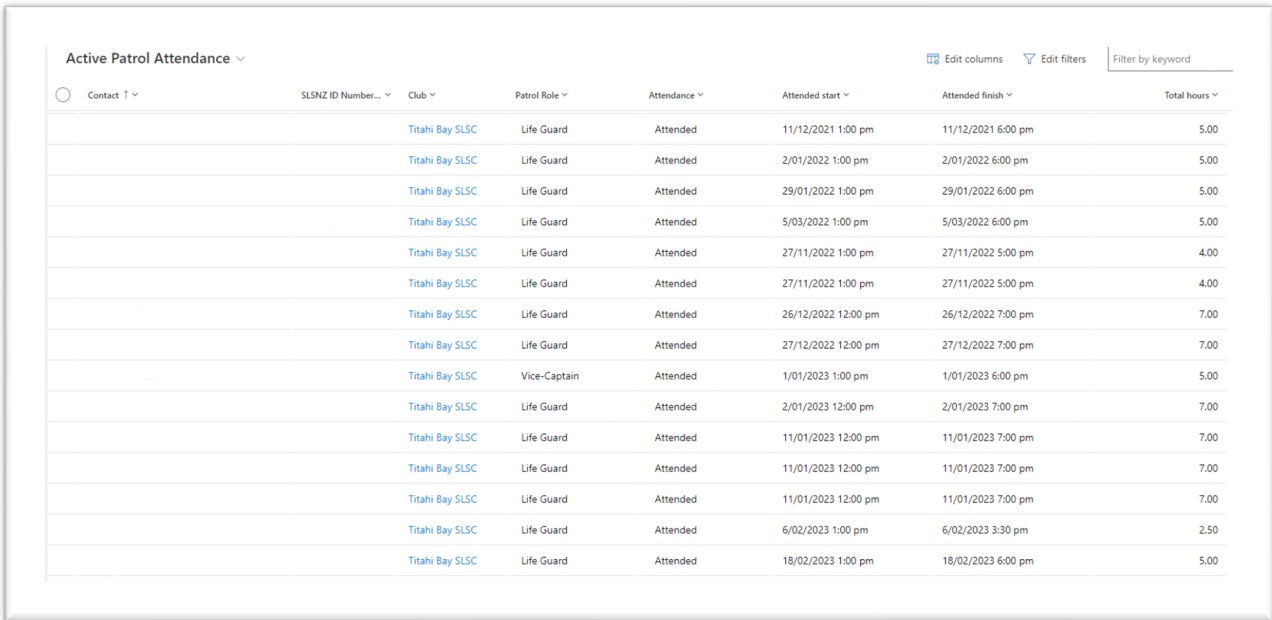
6.	Admin	CRM	The Incidents tab shows you if there was an incident linked to the patrol. In this instance there weren't any. (You can link an existing incident on this screen.)
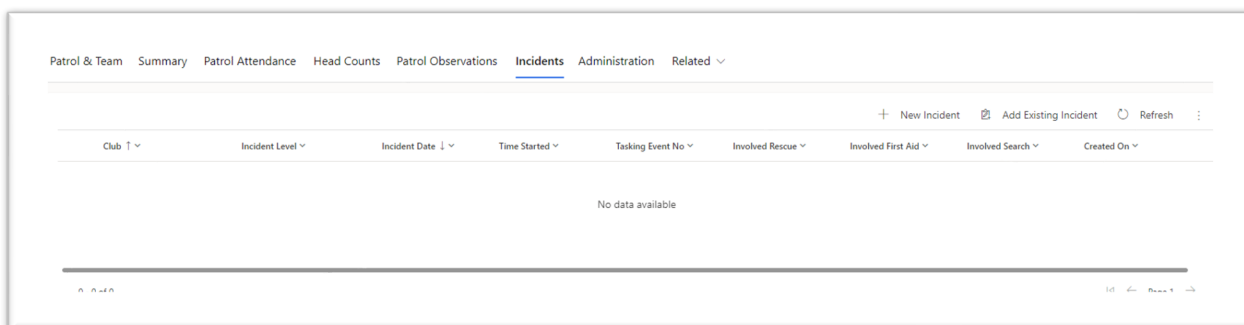
PATROL ATTENDANCE

The Patrol Attendance item allows you to see Patrol Occurrences attributed to an individual
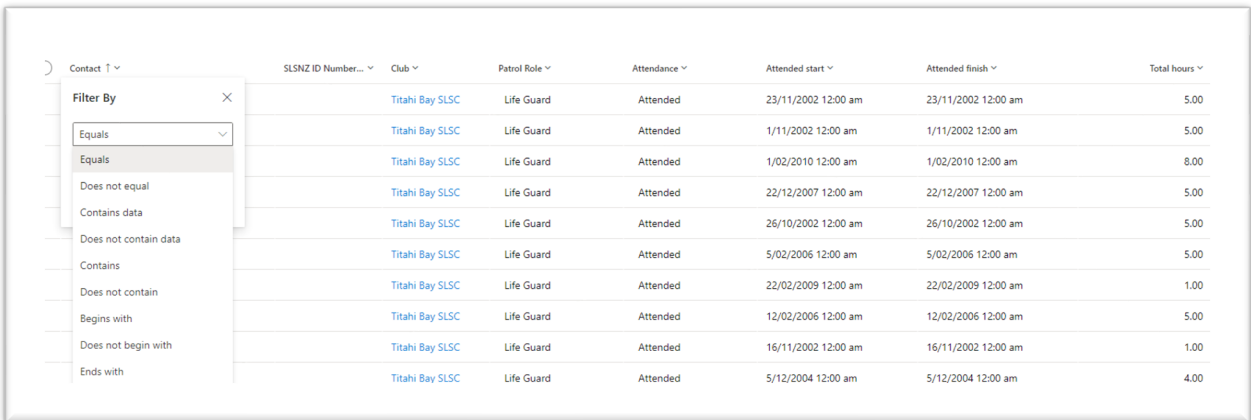
Step	Person	System	Step
1.	Admin	CRM	In the Patrolling module, go to Patrol Attendance. In this example, a single person has completed each of these patrols (name and ID blocked for privacy reasons.

Step	Person	System	Step
2.	Admin	CRM	If you want to filter the results, click the drop-down arrow next to the column name and select Filter By.

Step	Person	System	Step
3.	Admin	CRM	If you want to filter the results, click the drop-down arrow next to the column name and select Filter By. Then select one of the options presented. You can then tailor the information presented to you.

CREATE AN INCIDENT

CRM Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role

Step	Person	System	Step
1.	Admin	CRM	In the Patrolling module, go to Incidents. Click +New to create a new one

Step	Person	System	Step
2.	Admin	CRM	Complete the required fields, as well as any additional information that you know. If it occurred during a Patrol, select the Patrol from the Patrol Occurrence field. If a specific team was involved, tag them in the Patrol Team field.

3.	Admin	CRM	On the Summary of Incident tab, add as much information as you can about the incident. Try to ensure spelling is accurate as this will help with searching for incidents in the future.

Overview   **Summary of Incident (What, When...**   Detail   Resources   Patients   Members

50YO male walking along rocks, slipped and fell. Left foot had 2 lacerations from oyster shells. Judy cleaned the wounds and applied bandages. No pain relief required.

4.	Admin	CRM	On the Detail tab, check the boxes as appropriate

Overview   Summary of Incident (What, When,...   **Detail**   Resources   Patients   Members

Incident Type

Rescue	☐
Patient Assist	☑
First Aid	☐
Search	☐
Near Miss	☐

Activities Involved

Swimming	☐		Fishing	☐
Surfing/bodyboarding	☐		Attempt To Rescue Others	☐
Sail or Boat	☐		SLS Competition / Training	☐
Walking/Running	☑		Other	---

Incident Conditions

5.	Admin	CRM	On the Resources tab, check the boxes as appropriate

Overview   Summary of Incident (What, When,...   Detail   **Resources**   Patients   Members

IRB	☐		Radios	☐
Rescue Tube	☐		RWC	☐
Rescue Board	☐		No Equipment	☐
Rescue Vehicle / ATV	☐		First Aid Supplies	☑
Other	---		Methoxyflurane	☐

6.	Admin	CRM	Click Save

← ☐ | 🖫 **Save**   🖫 Save & Close   + New

New Incident - Unsaved

Overview   Summary of Incident (What, When,...   Detail   **Resources**   Patients   Members

IRB	☐		Radios	☐

Add a patient

7.	Admin	CRM	Once saved, you will be able to add a new patient. Open the Patients tab and click +New Patient.

Overview   Summary of Incident (What, When,...   Detail   Resources   **Patients**   Members   Related ⌄

+ New Patient   🔄 Refresh   🖩 Run Report ⌄   ⋮

Incident ↑ ⌄	Incident Date (Incident) ⌄	Club (Incident) ⌄	First Name ⌄	Last Name ⌄	Age Range ⌄	Ethnic Origin ⌄	Gender ⌄

No data available

0 - 0 of 0 |◁ ← Page 1 →

8.	Admin	CRM	The mandatory fields are the patient's gender and whether they are a member of SLSNZ. If you know the patient's personal details, enter them here.
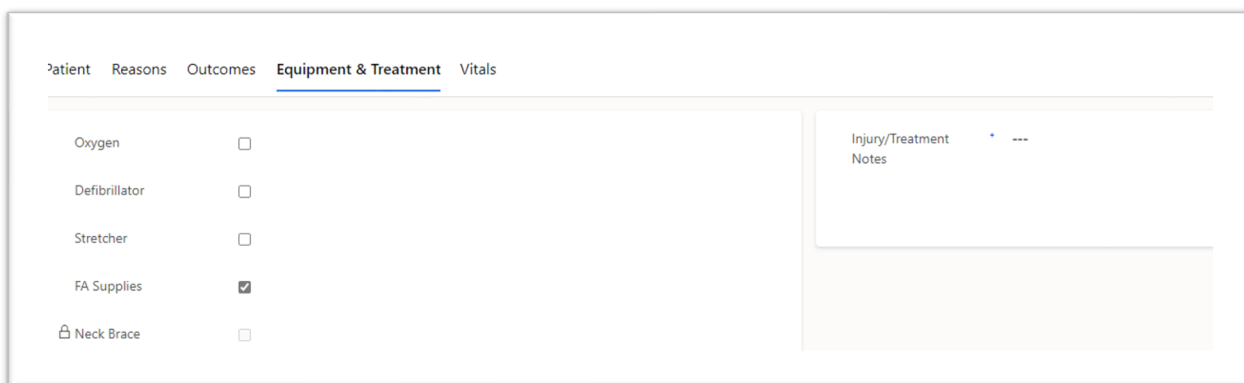
9.	Admin	CRM	On the Reasons tab, select all that are applicable
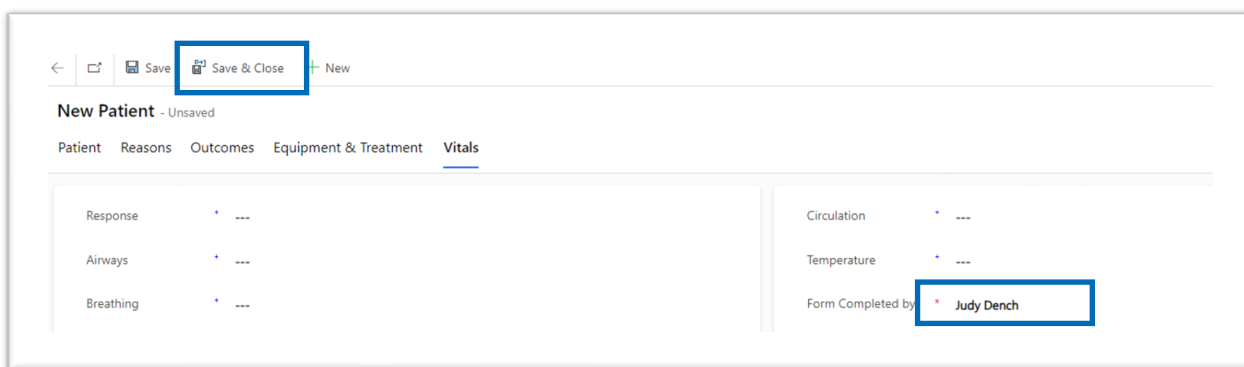
10.	Admin	CRM	On the Equipment & Treatment tab, select all that are applicable

11.	Admin	CRM	On the Vitals tab, select all that are applicable. Ensure your name is added to the Form Completed By field. Then click Save & Close.

12.	Admin	CRM	Your Incident will now be closed with the Patient details attached.

PATIENTS

CRM Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role

Points to note:

1. This screen provides a summary of all Patients that have been created.
2. Do not use this view to create a patient. If you want to create a new patient, create an incident first. The process can be found here: Create an Incident
3. Your security role provides access to Patients within your business unit. This means:
   a. If your Business Unit is an individual club, you will have the access to create, view, and edit the Patients linked to your club
   b. If your Business Unit is a Region, and you have the Base Role, you will have the access to create, view, and edit all Patients from the clubs within your region.
   c. If your Business Unit is Surf Life Saving NZ, and you have the Base Role, you will have the access to create, view, and edit all Patients from all clubs.

HEAD COUNT

CRM Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role

Points to note:

1. This screen provides a summary of Head Counts that have been recorded during patrols.
2. Do not use this view to create a Head Count. If you want to create a new Head Count, do it from Patrol Occurrence.
3. Your security role provides access to Head Counts within your business unit. This means:
   a. If your Business Unit is an individual club, you will have the access to create, view, and edit the Patrol Occurrences linked to your club
   b. If your Business Unit is a Region, and you have the Base Role, you will have the access to create, view, and edit all Head Counts from the clubs within your region.
   c. If your Business Unit is Surf Life Saving NZ, and you have the Base Role, you will have the access to create, view, and edit all Head Counts from all clubs.

PATROL TEAMS

CRM Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role

Points to note:

1. Your patrol teams can be created before the season starts. Once the teams are established you can select the dates that this team will patrol on.
2. Once a member has been selected for a team they can log into their Member Lounge and see "My Patrols".
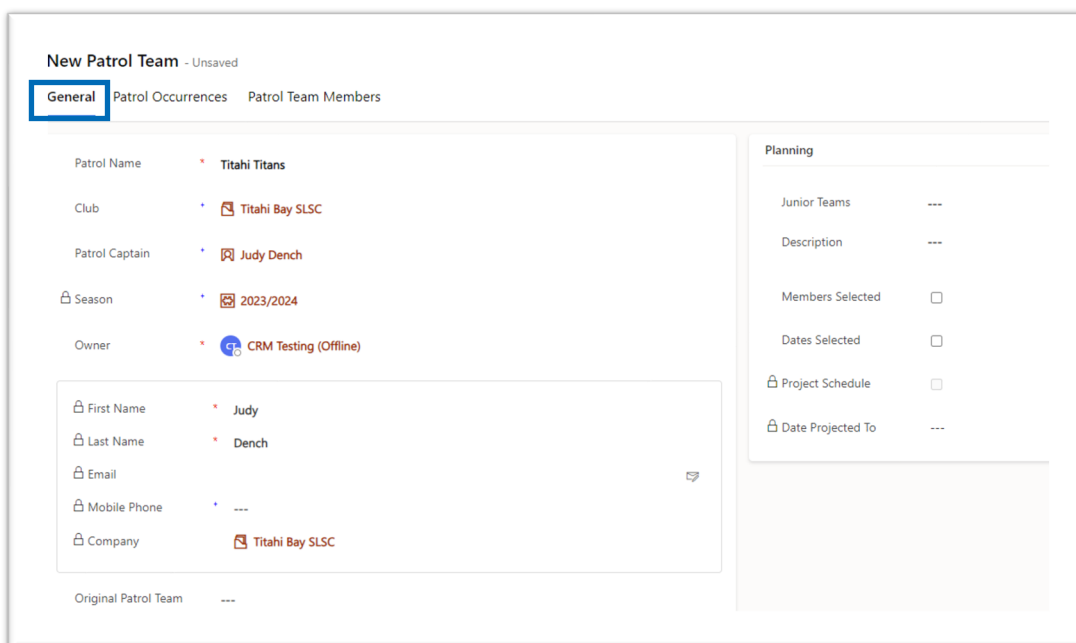
Step	Person	System	Step
1.	Admin	CRM	In the Patrolling module, go to Patrol Teams under the Patrol Planning heading
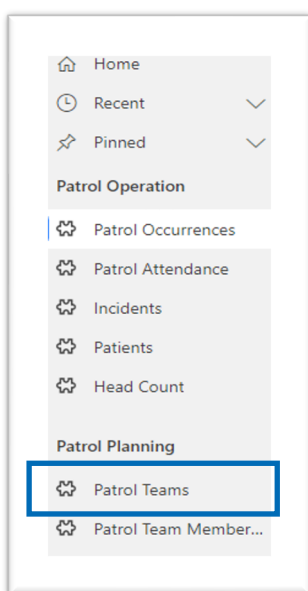
2.	Admin	CRM	Click +New to add a new Team
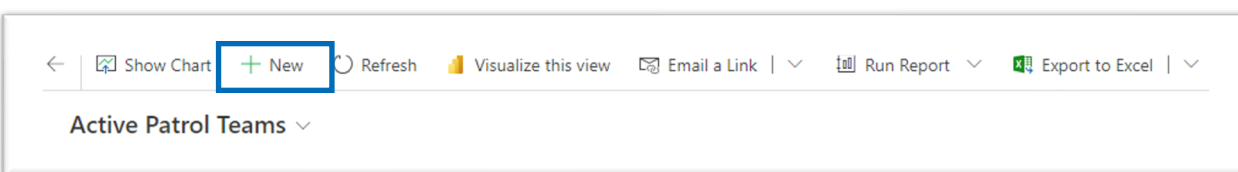
3.	Admin	CRM	On the General tab, complete the following: Team name The Club Select a captain
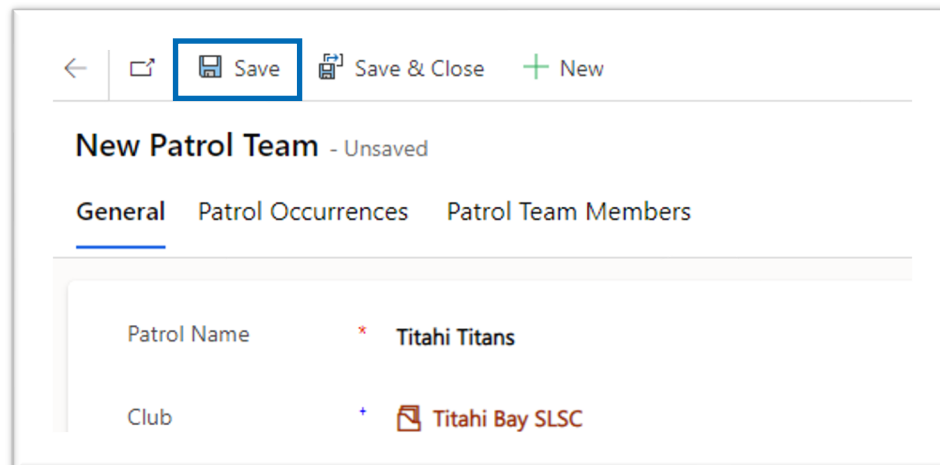
4.	Admin	CRM	Click Save

Add Team Members

5.	Admin	CRM	Click on the Patrol Team Members tab. The captain will already be listed. Click +New Patrol Team Member
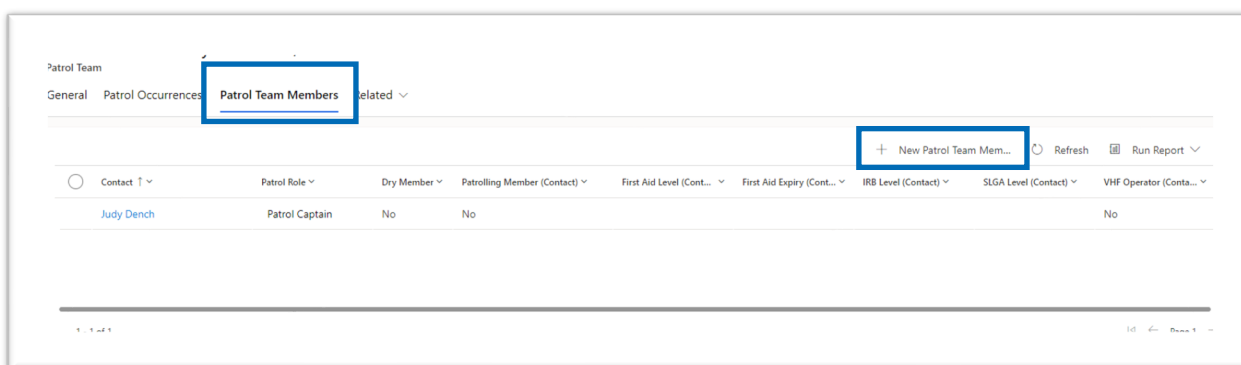
6.	Admin	CRM	In the Member field, select a member of your club that you would like to add to the team.
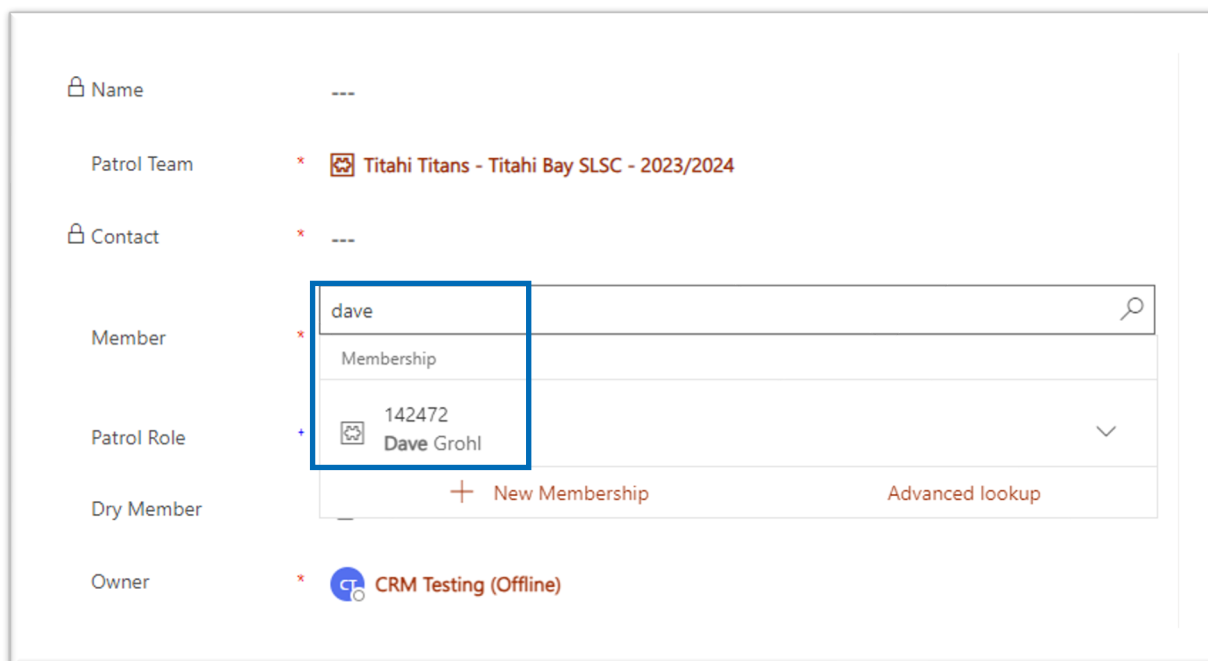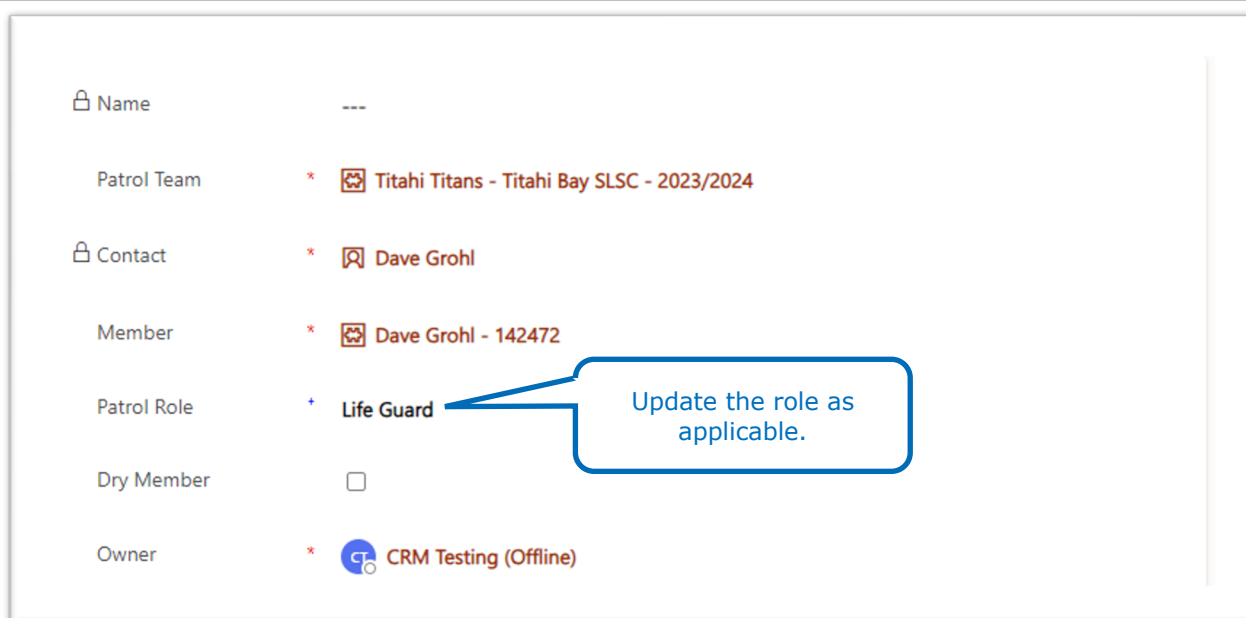
7.	Admin	CRM	Each team member must be added individually. Locate the Member you want to add. By selecting them, the rest of the page will populate. This search function only looks for Active memberships.

Update the role as applicable.

8.	Admin	CRM	If you want to add more members, click Save. If you are finished, click Save and Close

Add Patrol Occurrences

9.	Admin	CRM	Click on the Patrol Occurrences tab

10.	Admin	CRM	Click on the Patrol Occurrences tab

11.	Admin	CRM	Click +New Patrol Occurrence

12.	Admin	CRM	Complete the Date of Patrol, Location, and Type of Service.

13.	Admin	CRM	On the Summary tab, complete the start and finish times of the patrol. Then click Save.
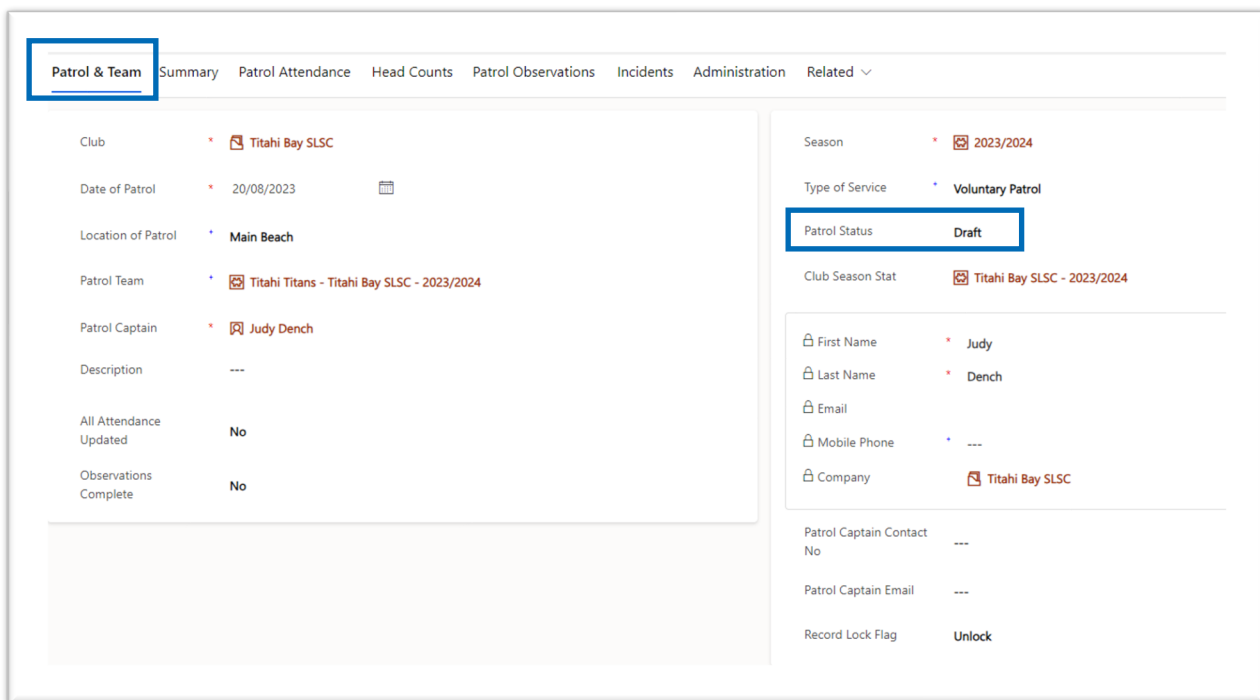
14.	Admin	CRM	When you are ready, go back to the Patrol & Team tab and change the status from Draft to Ready to Project. Click Save

15.	Admin	CRM	Now go back to Patrol Teams, locate and open your team
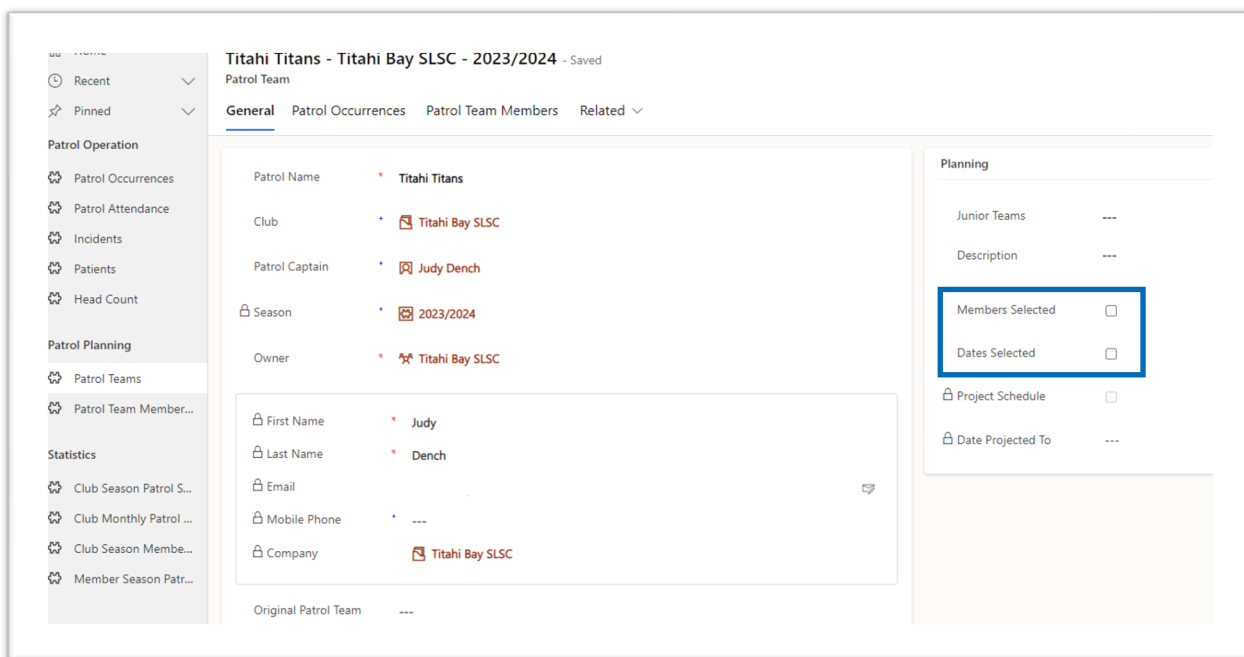
16.	Admin	CRM	Tick the Members Selected and Dates Selected. This will unlock the Project Schedule box for you to tick. Once all three are ticked, click Save and Close.

17.	Workflow	CRM	A process will then run in the background which updates the Patrol Status to Planned.

When team members log into the portal, they will now see the planned patrol:

National Module
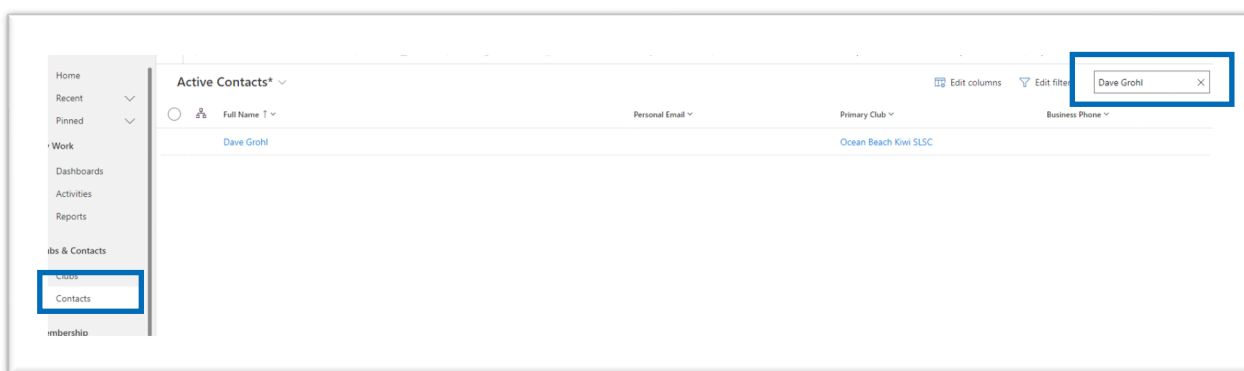
Vetting

All staff, and anyone who works with children, must be police vetted. Vetting is completed every two years.
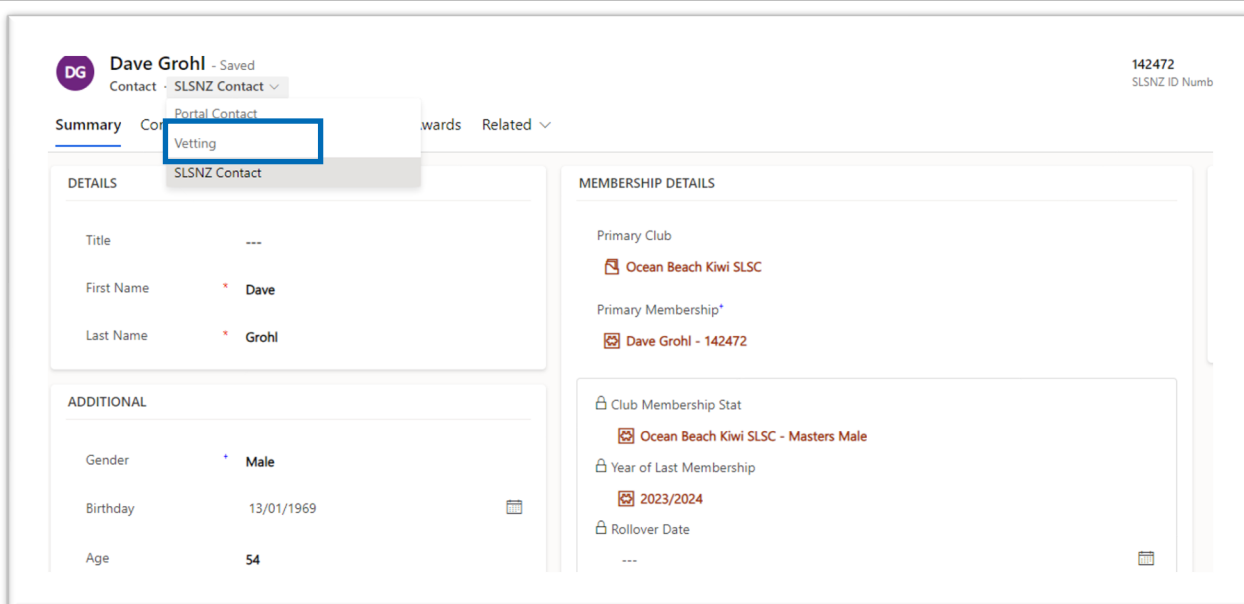
RECORD THE VETTING STATUS

CRM Security role required:	_SLSNZ – Vetting (Police Liaison)
Prerequisites	Contact must exist in the CRM
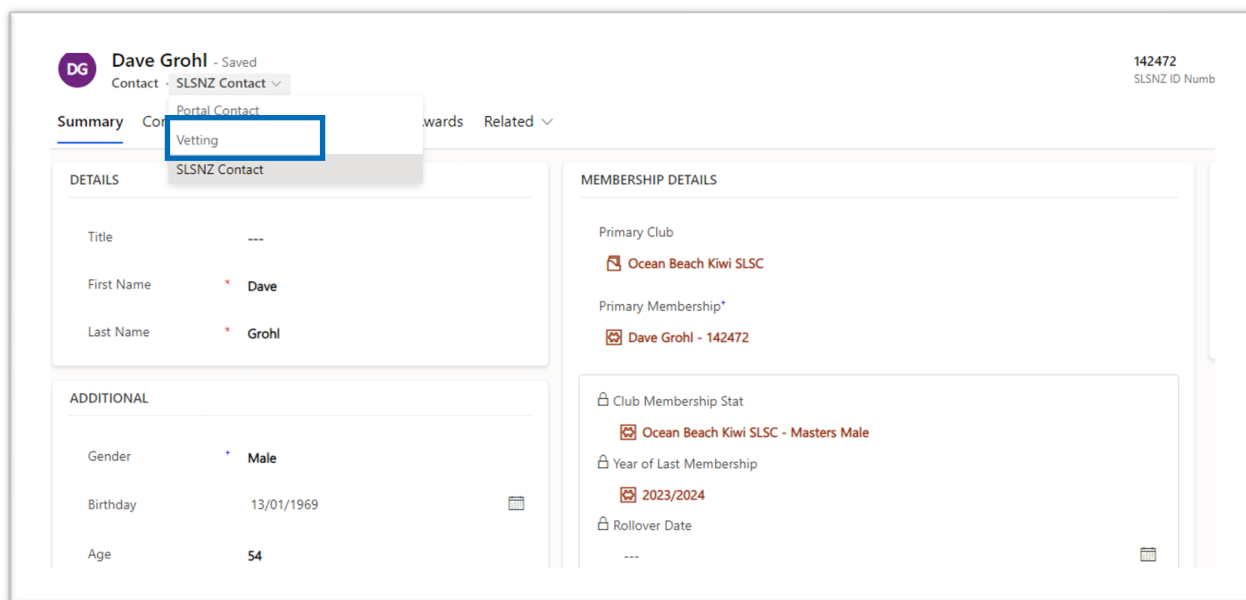
Step	Person	System	Step
1.	Administrator	CRM	In the Membership module, locate the Contact. Go to Contacts > Use the search box to find the contact.

| 2. | Administrator | CRM | Open the record.
Select Vetting from the drop-down list |

3.	Administrator	CRM	Open the record. Select Vetting from the drop-down list
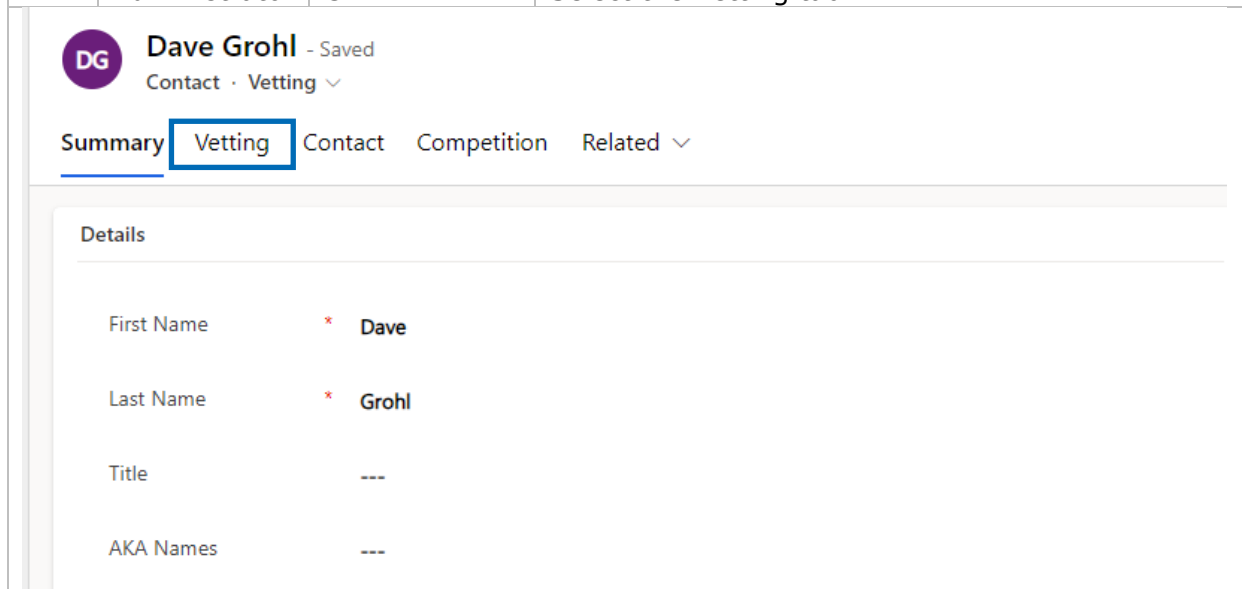
4.	Administrator	CRM	Select the Vetting tab
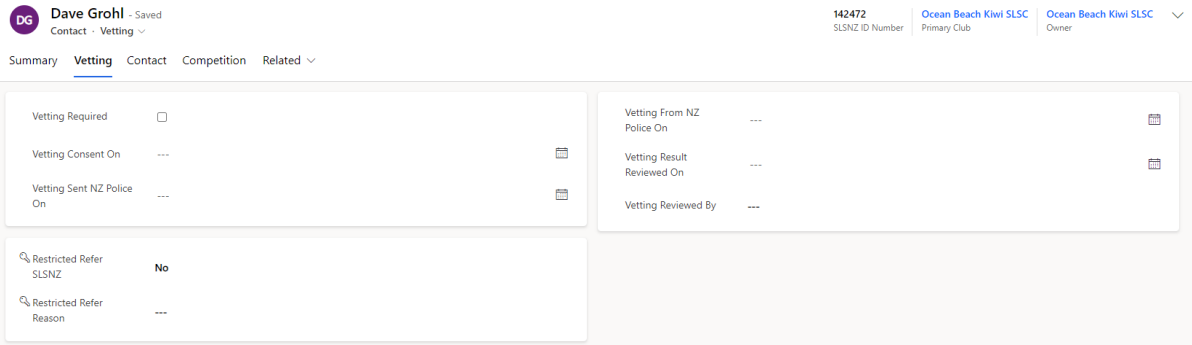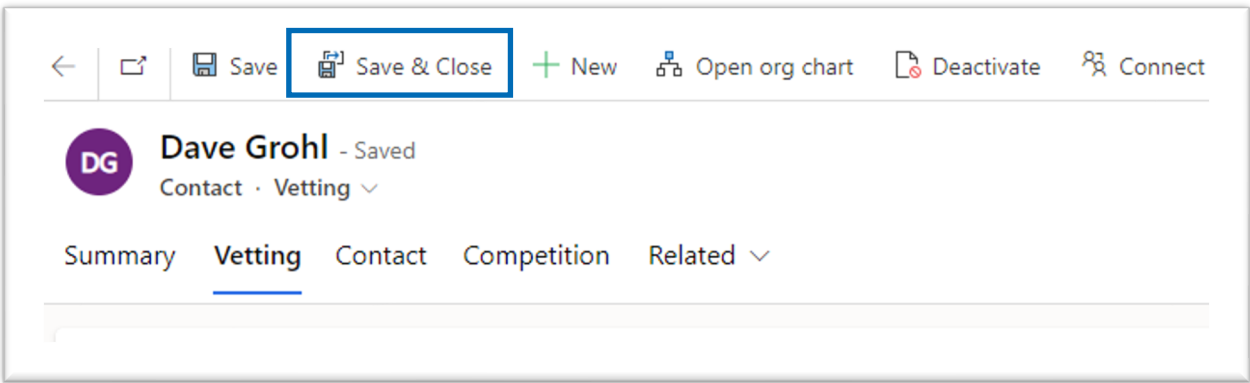
5.	Administrator	CRM	Complete the appropriate fields: Vetting required: tick Vetting consent on: when consent was approved by the contact Once the result is back: Vetting from NZ Police on: the date the result was received Vetting result reviewed on: the date SLSNZ reviewed the result Vetting reviewed by: the person who reviewed the result at SLSNZ

5.	Administrator	CRM	To save changes click Save & Close.

Courses and Awards overview

<u>Points to note:</u>

1. The CRM works with eTrainU, where the CRM is effectively a database, and eTrainU is an online learning platform.
2. Courses are created in eTrainU and this information is transferred to the CRM through a system workflow.
3. Course Instances are created in the CRM.
4. When members want to apply for a course, they contact their CDO who adds them to a Course Instance.
5. When the course has been completed and an award is applied, an Award is recorded against a *Primary Membership*. If a member has a secondary membership with another club, that club will be unable to see the member's awards.
6. An award can be loaded against a member either:
   a. manually by the education team
   b. via a Course Instance in the CRM
   c. by eTrainU
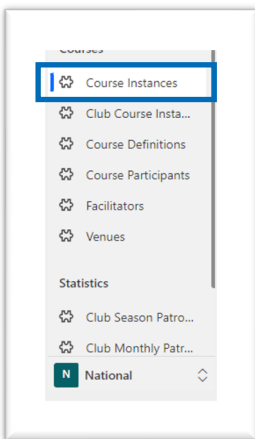
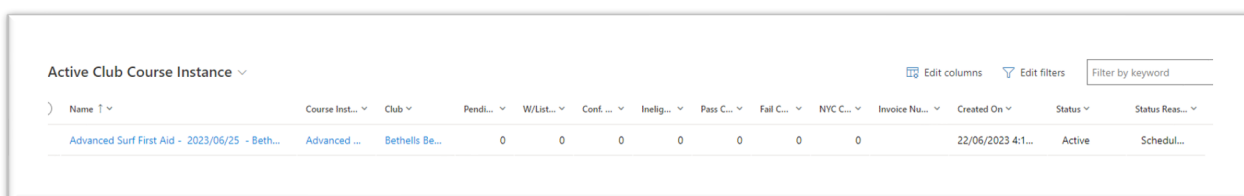# VIEW COURSE INSTANCES
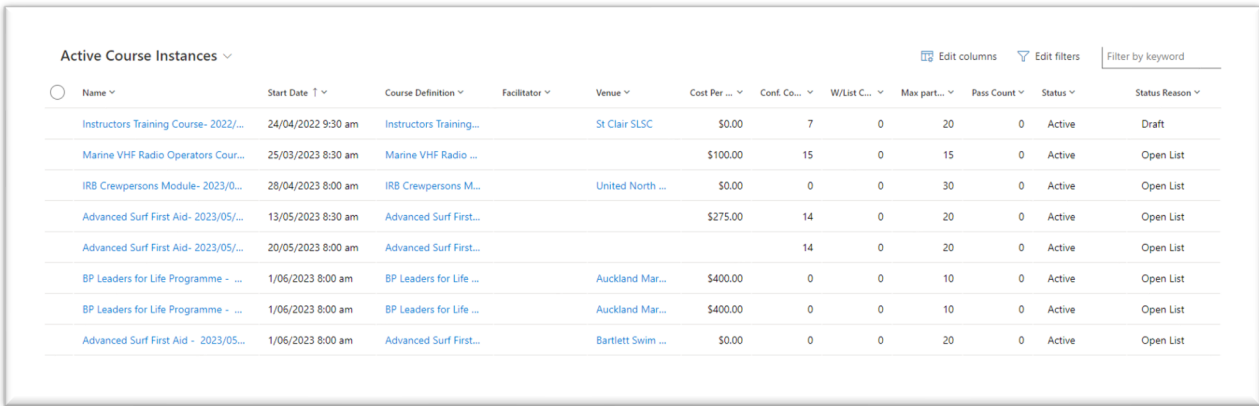
CRM Security role required:	_SLSNZ – Admin Level 2 (Regional) OR _SLSNZ – Admin Level 3 (National)

Step	Person	System	Step
1.	Admin	CRM	In the National module, click on Course Instances

Step	Person	System	Step
2.	Admin	CRM	This will show you all active courses that are available. Even if you have Regional access, you can see active courses around the country.

3.	Admin	CRM	If you open the Course Instance, the General tab will show you the following: - Start date of the course - Where it is being held - The name of the facilitator - The Award you will receive if you complete it - The last date for applications - The cost - The number of participants

4.	Admin	CRM	The Prerequisites & Preparation tab shows you what the attendee needs to do prior to attending the course.

5.	Admin	CRM	The Club Participation tab shows you the clubs that have access to the course instance.

6.	Admin	CRM	The Participants tab shows you the members who are attending and their booking status

7.	Admin	CRM	The Marking & Outcome tab shows you the outcome of the course

VIEW CLUB COURSE INSTANCES

CRM Security role required:	_SLSNZ – Admin Level 2 (Regional) OR _SLSNZ – Admin Level 3 (National)

Step	Person	System	Step
1.	Admin	CRM	In the National module, click on Club Course Instances. This will display all courses for all clubs that you have access to.
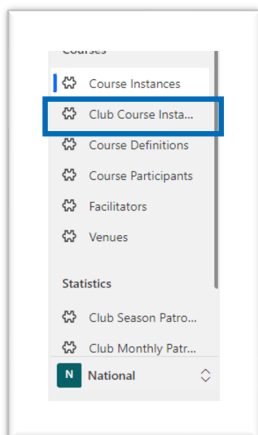
2.	Admin	CRM	Find the course you are looking for by using the Search box, Editing the columns, or filtering an existing column. Double click it to open it.

3.	Admin	CRM	Once you have opened the course instance, you have the ability to view the details of the course, and the participants and their eligibility.

General details

Participants

ENROL A MEMBER IN A COURSE

CRM Security role required:	_SLSNZ – Admin Level 3 (National)

Step	Person	System	Step
1.	Admin	CRM	Complete the steps in View Club Course Instances to locate the course the participant is to be added to. Click on the Participants tab
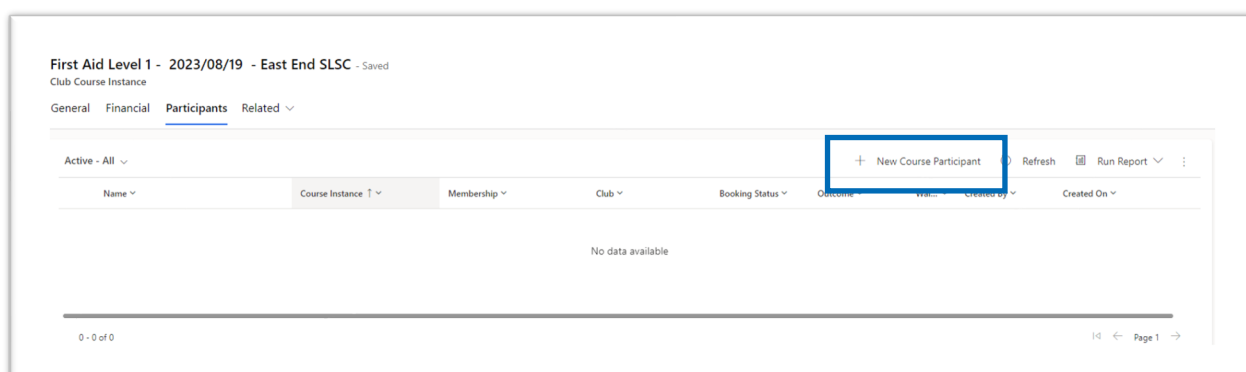
2.	Admin	CRM	Click +New Course Participant
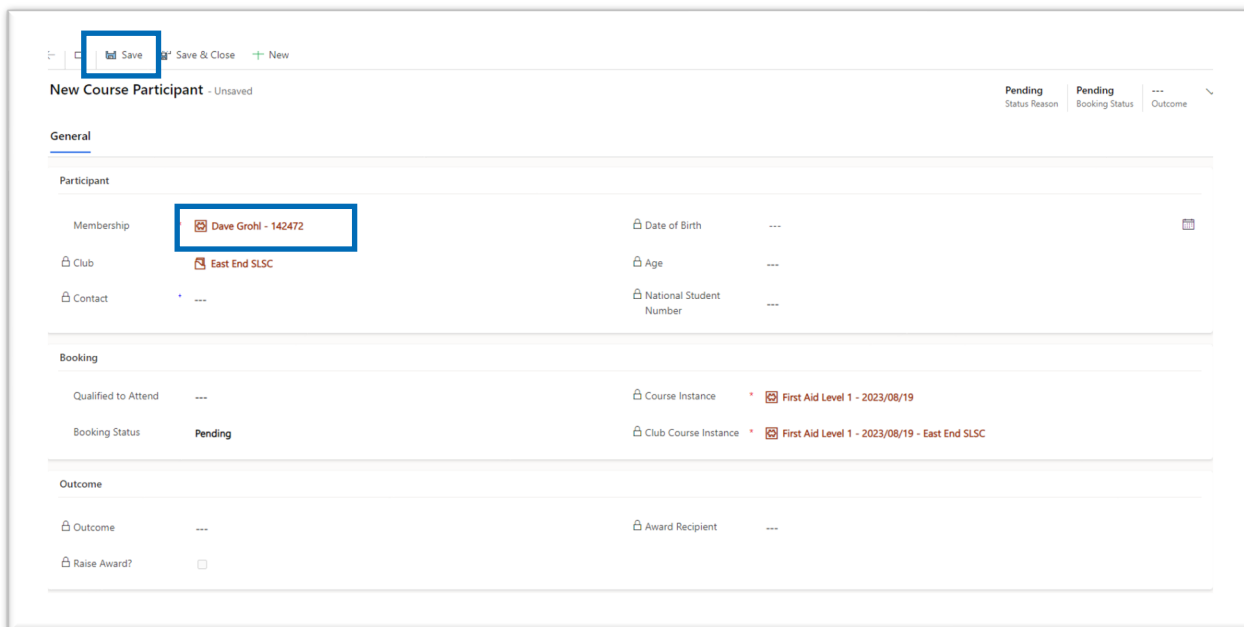
3.	Admin	CRM	In the Membership field, locate the member. Then click Save.
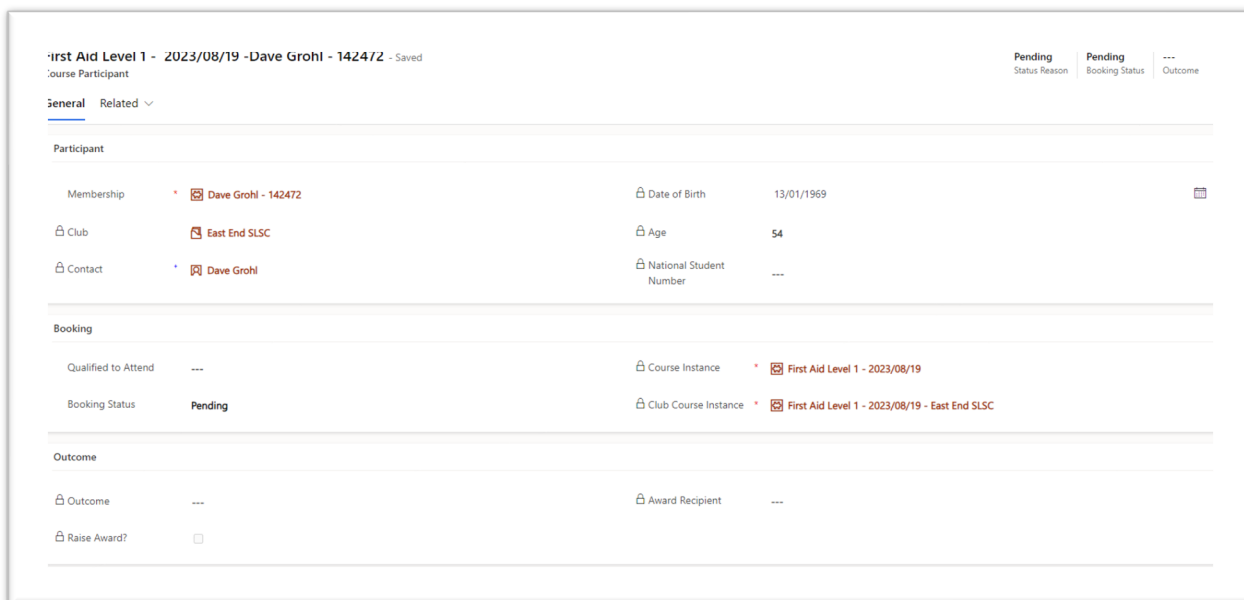
4.	Admin	CRM	Clicking Save will populate the member's data.

5.	Member	Member portal	At this point, the member can see the course in the Portal under Member Lounge > My Courses

If this course is being managed in eTrainU, no further action is required to register. Only continue if the course is managed in the CRM.

6.	Member	CRM	Update the Qualified to Attend field to Yes, then click Save.

7.	Admin	CRM	When the participant has been confirmed, click the arrow at the top right and a drop-down list will display.
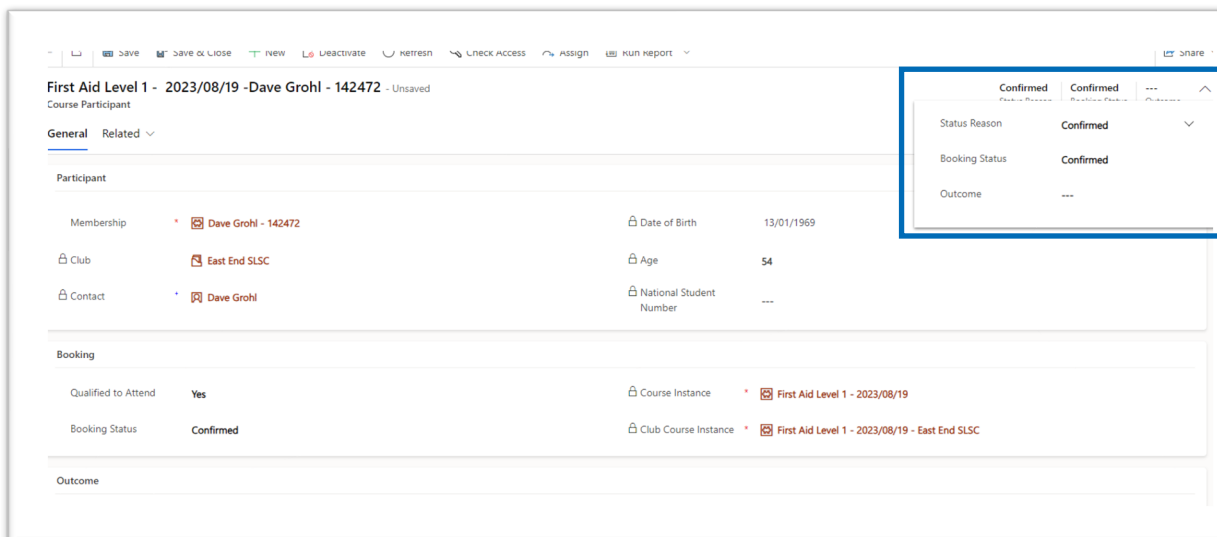
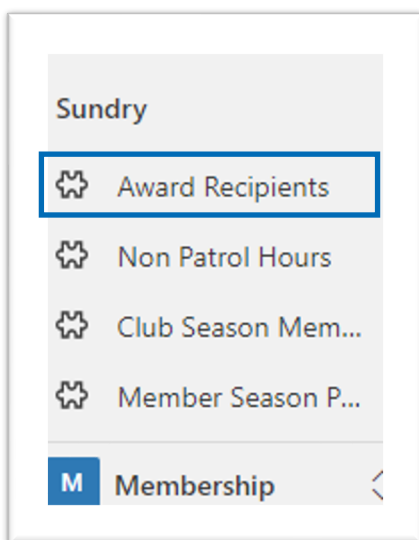| 8.	Admin	CRM	Change the Status Reason and Booking Status to Confirmed. Click Save.

ADD AN AWARD RECIPIENT RECORD

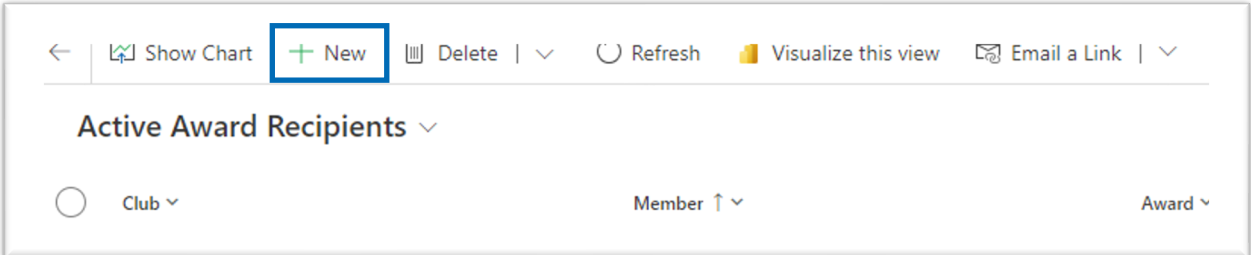| CRM Security role required:	Minimum - _SLSNZ- Admin Level 1 (Club)
Award Approval Level required	National – can approve awards nationally Regional – can approve your region's awards Club – can approve awards for your club members

Points to note:
1. Although every Contact exists just once, they may hold multiple Membership records. We want to select the Membership held with their <u>primary</u> club, but it can be hard to tell which one is which. It is particularly niggly at the beginning of the season when members might not have been made active and are still in the inactive report.
2. Awards, like all the records in the CRM, can either be Active or Inactive status. When an award is added, it is automatically active.
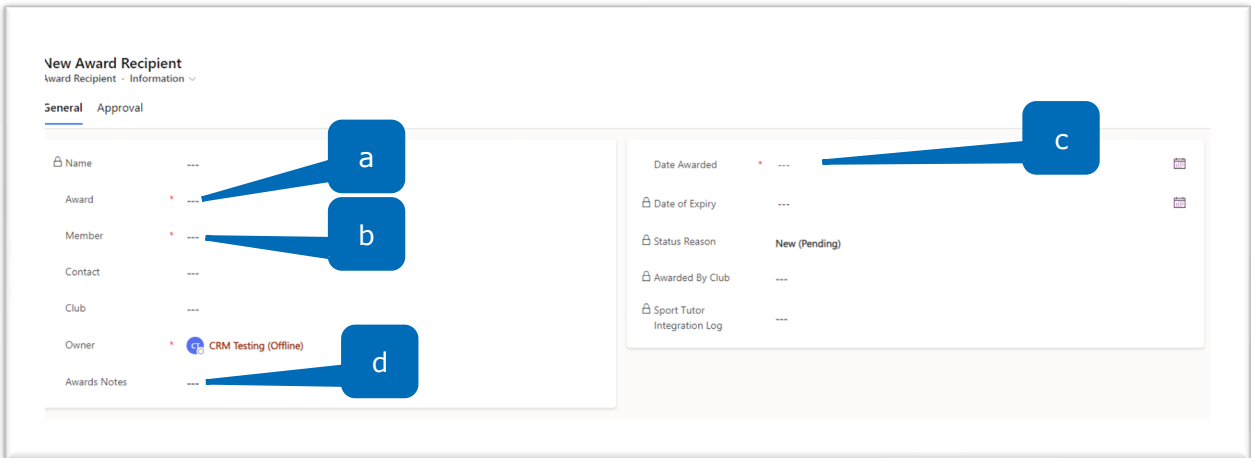3. If you are trying to enter members into the sports system, their awards must be active.

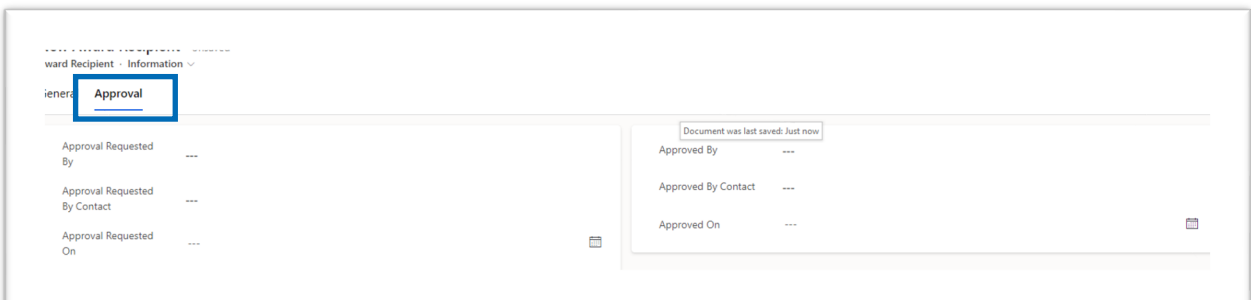| Step	Person	System	Step
1.	Award approver	CRM	In the Membership module, select Award Recipients

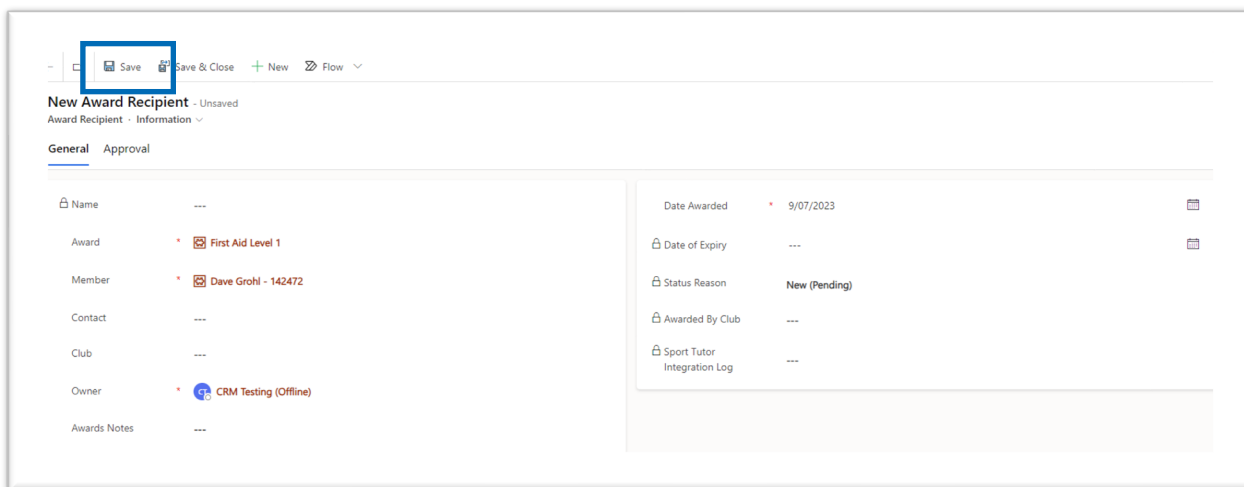| 2.	Award approver	CRM	Click +New

3.	Award approver	CRM	Complete the following information:

a.	Award	Search for the award achieved
b.	Member	Search for the member receiving the award
c.	Date awarded	Enter the date the award was achieved
d.	Award notes	Enter any notes needed, such as where the award was gained.

4.	Award approver	CRM	Click on the Approval tab and check that all six fields are empty.

5.	Award approver	CRM	Click Save
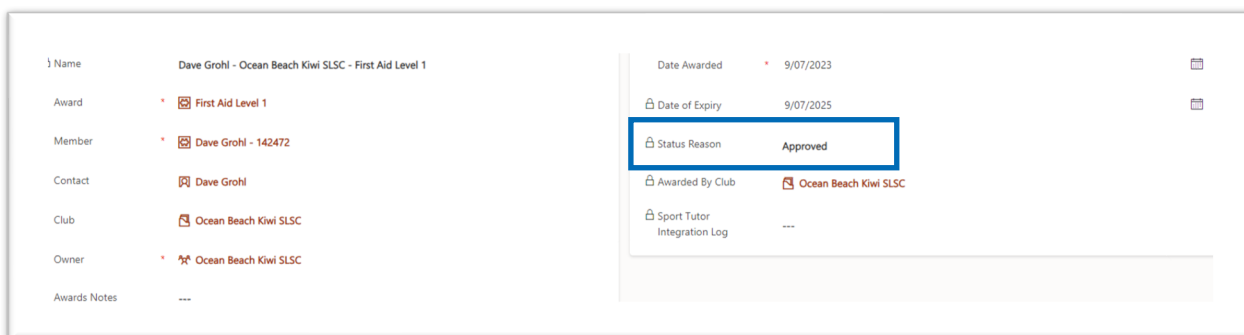
6.	Award approver	CRM	Provided the member has met the prerequisites of the award, and they are an active member, the Status Reason should update to Approved.

If the Status Reason does not update to Approved, the award will not be shown correctly in eTrainU or Waves.