

Microsoft Dynamics 365 (CRM)

User Guide

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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

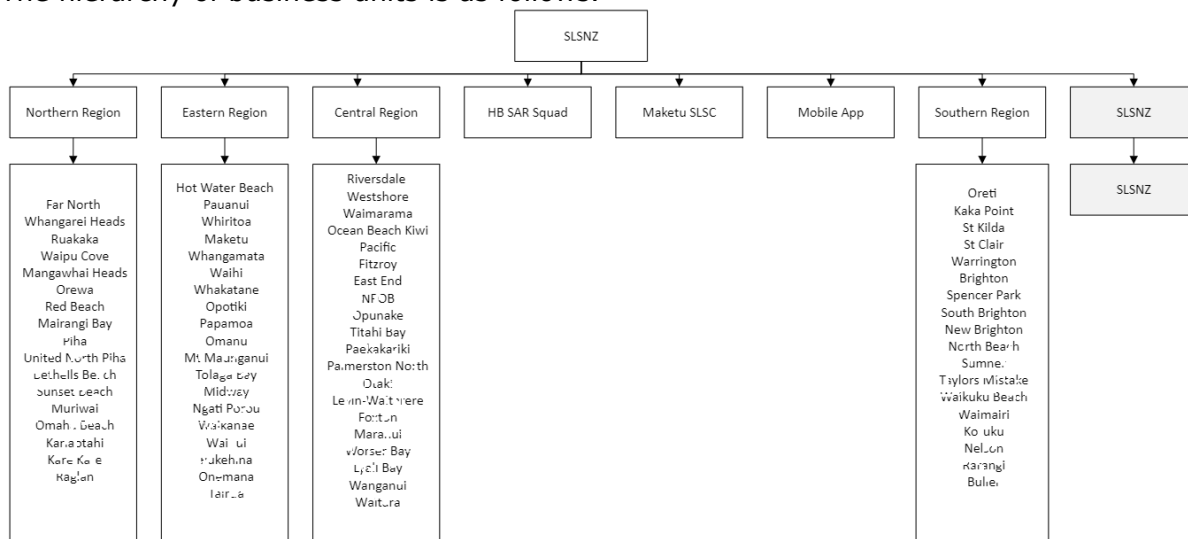
Supported OS

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: <ul style="list-style-type: none"> 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

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

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

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

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

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.

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

Helpful tips

Logging in

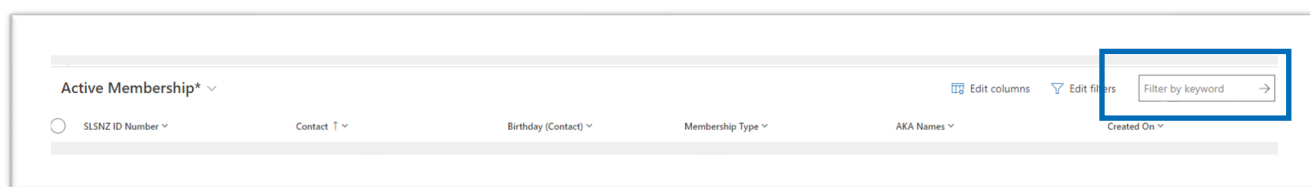
The CRM is now held in the cloud, which means it is accessible from anywhere you have an internet connection.

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.

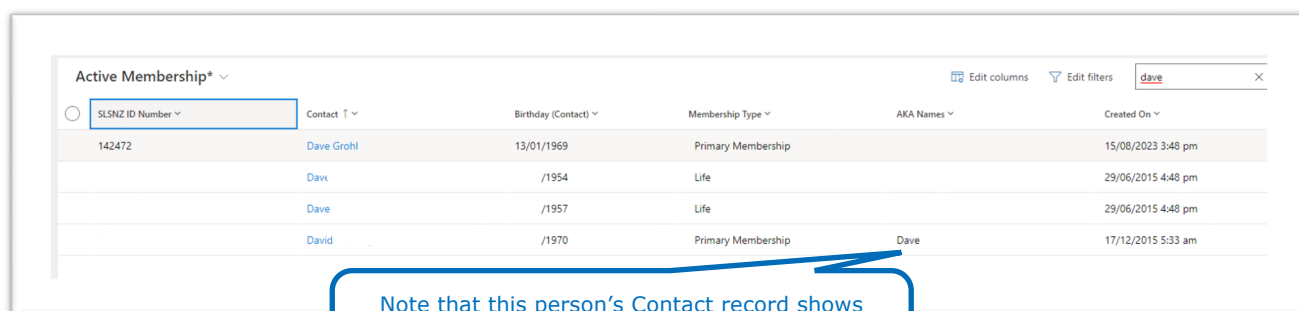


Active Membership* ▾ Edit columns Edit filters Filter by keyword →

SLSNZ ID Number ▾ Contact ↑ ▾ Birthday (Contact) ▾ Membership Type ▾ AKA Names ▾ Created On ▾

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.



Active Membership* ▾ Edit columns Edit filters dave ×

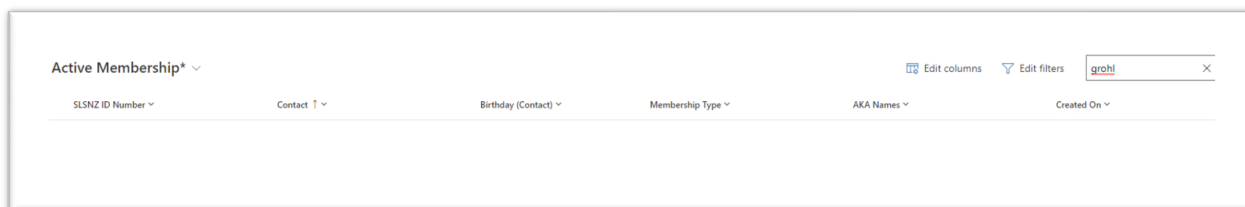
SLSNZ ID Number ▾	Contact ↑ ▾	Birthday (Contact) ▾	Membership Type ▾	AKA Names ▾	Created On ▾
142472	Dave Grohl	13/01/1969	Primary Membership		15/08/2023 3:48 pm
	Dave	/1954	Life		29/06/2015 4:48 pm
	Dave	/1957	Life		29/06/2015 4:48 pm
	David	/1970	Primary Membership	Dave	17/12/2015 5:33 am

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.

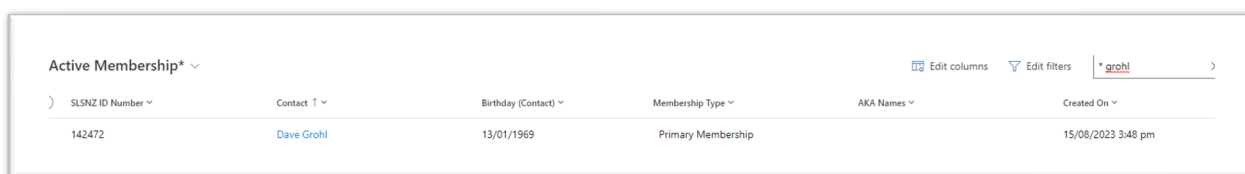
For example, I want to find someone in the CRM, but I don’t know his full name. I know his surname is Grohl. If I search “Grohl” no results are returned:



Active Membership* ▾ Edit columns Edit filters grohl X

SLSNZ ID Number ▾	Contact ↑ ▾	Birthday (Contact) ▾	Membership Type ▾	AKA Names ▾	Created On ▾
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But if I put a wildcard in in place of the first name, the system is able to find him.



Active Membership* ▾ Edit columns Edit filters * grohl X

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

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.

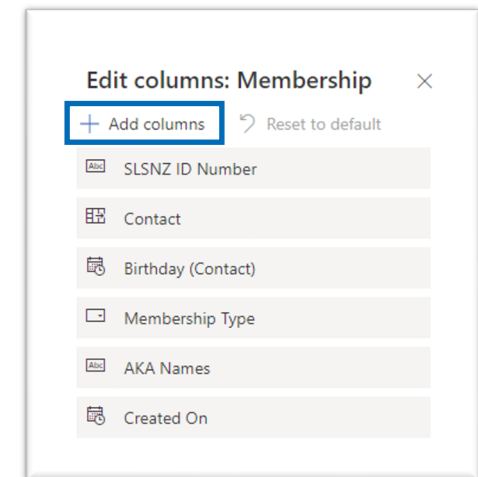
Step	Person	System	Step
1.	User	CRM	Click Edit Columns



Active Membership* ▾ Edit columns Edit filters * grohl X

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

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

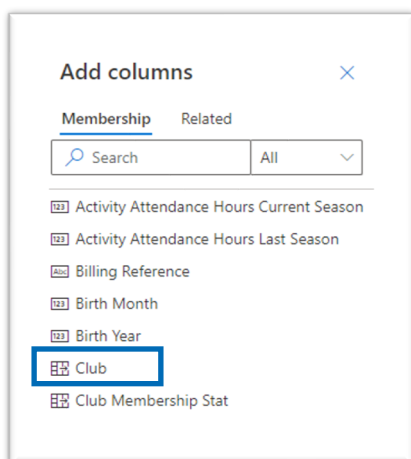


Edit columns: Membership X

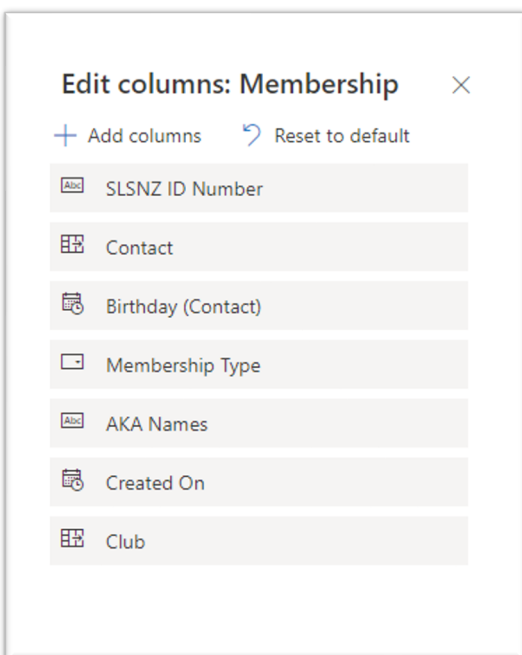
+ Add columns Reset to default

- SLSNZ ID Number
- Contact
- Birthday (Contact)
- Membership Type
- AKA Names
- Created On

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.
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4.	User	CRM	The system then displays the list of columns that will be shown. I've added Club to my list. Click Apply.
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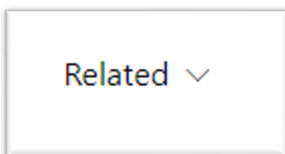


5.	User	CRM	The screen will then refresh with the new column(s) added at the end.
----	------	-----	---

Active Membership* ▼						
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

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.

Dave Grohl - 142472 - Saved

Membership

Details

Patrolling

Subscription

Patrol Hours

Related ▾

Name	Dave Grohl - 142472
Club	* Titahi Bay SLSC
Contact	* Dave Grohl
🔒 Season	2022/2023
Membership Type	Primary Membership
🔒 Is Last Season	Yes
🔒 Is Current Season	No
Competition Category	---
Owner	* Titahi Bay SLSC

🔒 First Name	Dave
🔒 Last Name	Grohl
🔒 AKA Names	---
🔒 Family	---

Related - Patrolling

Patrol Membership

Patrol Dates

Related - Membership

Membership Applications

Transfers

Non Patrol Hours

Related - History

Awards

Member Season History

Related - Common

Activities

Connections

Activities Attendance

Member Season Patrol Stats

Contact

Activities Attendance

Course Participants

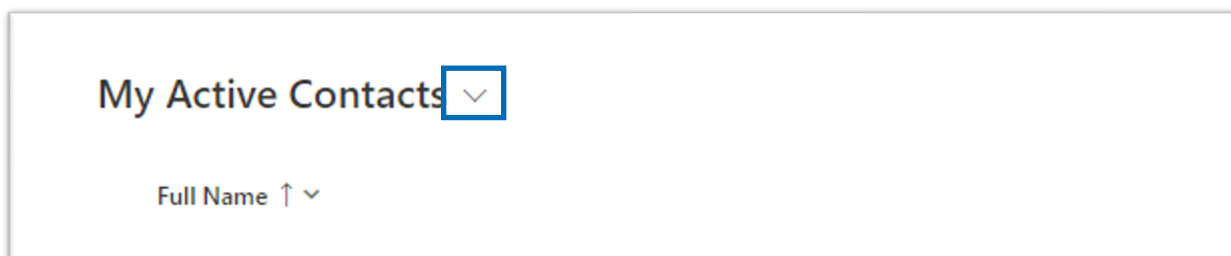
Facilitators

Roving Patrollers

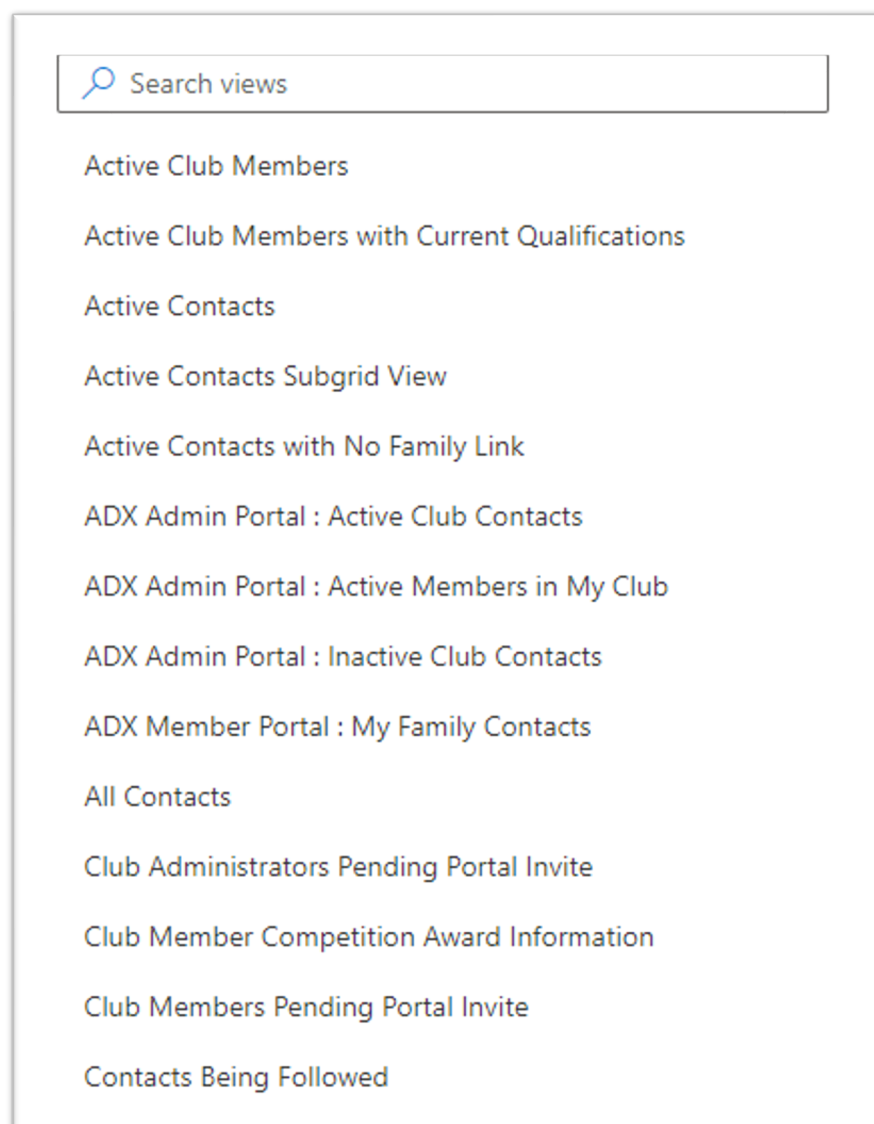
Setting default views

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.

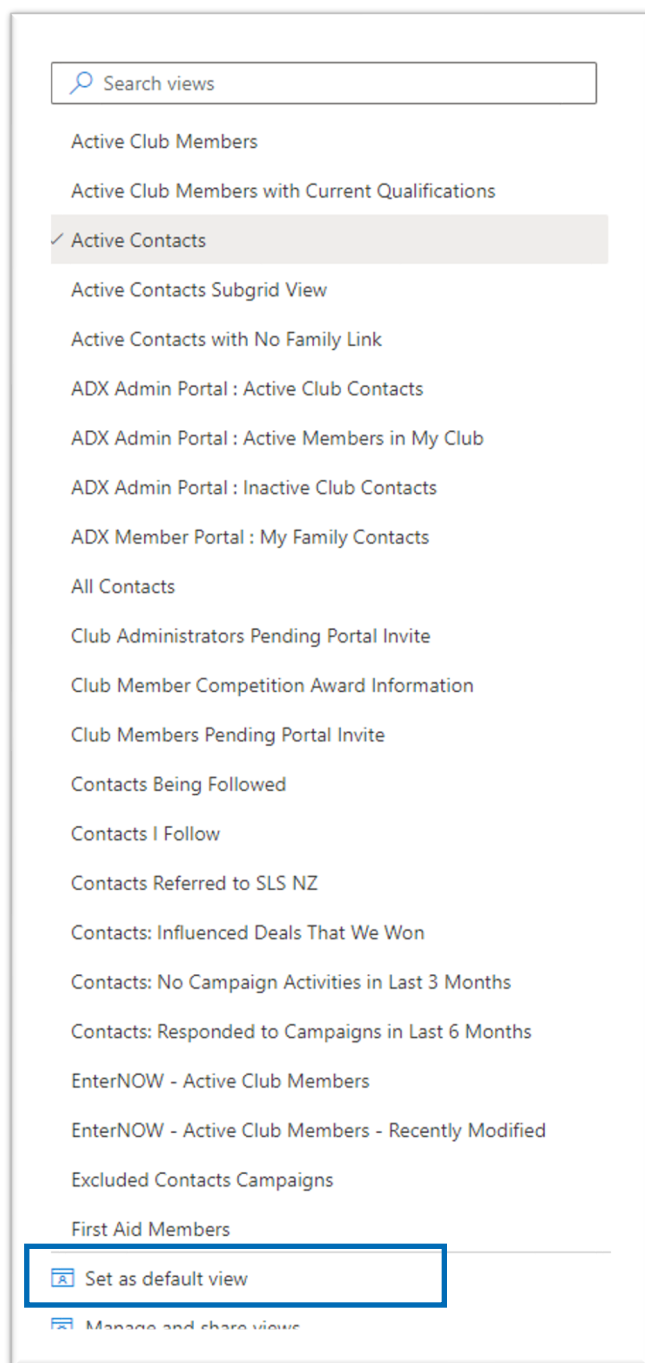
To change this, click the down arrow next to the heading:



Select the view you want to use.



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.



Membership Module

Dashboards

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

Points to note:

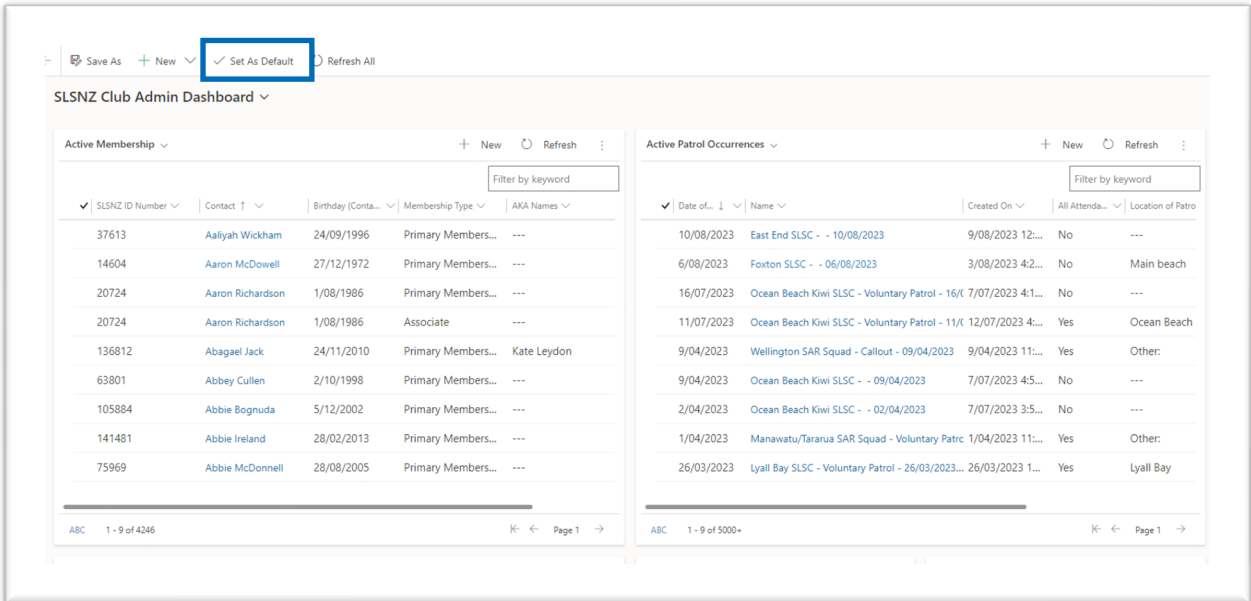
As a club or regional admin, you do not have the access to be able to create a new dashboard, but there are a number you can choose from. Among those is the SLSNZ Club Admin Dashboard which shows you:

- 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.

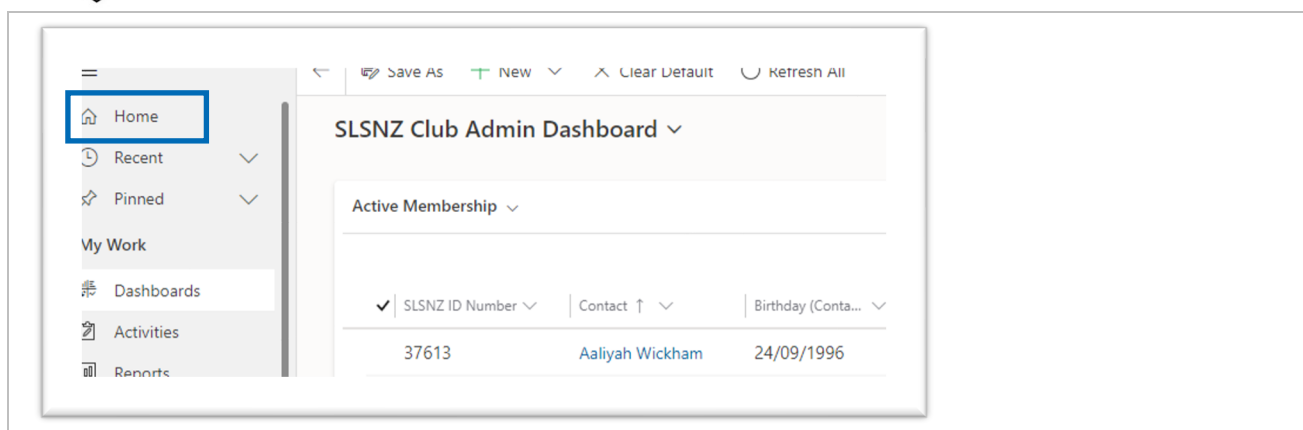
Step	Person	System	Step
1.	Admin	CRM	In the Membership module, select Dashboards
2.	Admin	CRM	Find the dashboard you want to save
3.	Admin	CRM	Click Set as Default



The screenshot shows the SLSNZ Club Admin Dashboard. At the top, there are buttons for 'Save As', 'New', 'Set As Default' (highlighted with a blue box), and 'Refresh All'. Below this, the dashboard is divided into two main sections:

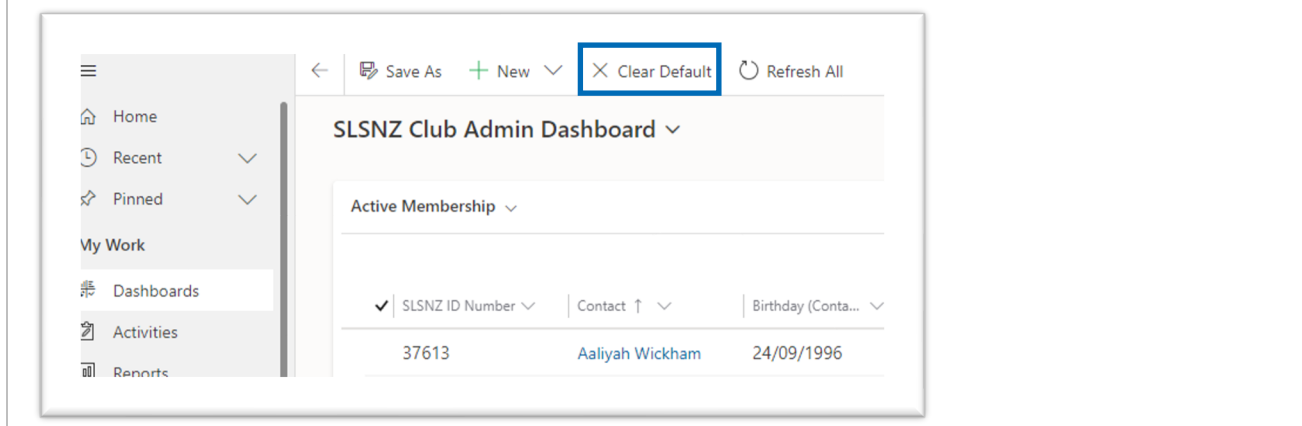
- Active Membership:** A table with columns for SLSNZ ID Number, Contact, Birthday (Contact), Membership Type, and AKA Names. It lists several members, including Aaliyah Wickham, Aaron McDowell, Aaron Richardson, Abagael Jack, Abbey Cullen, Abbie Bognuda, Abbie Ireland, and Abbie McDonnell.
- Active Patrol Occurrences:** A table with columns for Date of, Name, Created On, All Attendees, and Location of Patrol. It lists various patrol occurrences, including East End SLSC, Foxton SLSC, Ocean Beach Kiwi SLSC, Wellington SAR Squad, and Lyall Bay SLSC.

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

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



The screenshot shows the SLSNZ Club Admin Dashboard. In the top right corner of the dashboard area, the 'Clear Default' button is highlighted with a blue box. The sidebar on the left is identical to the previous screenshot, with 'Home' highlighted. The main content area shows the 'Active Membership' table with the same data as before.

Activities

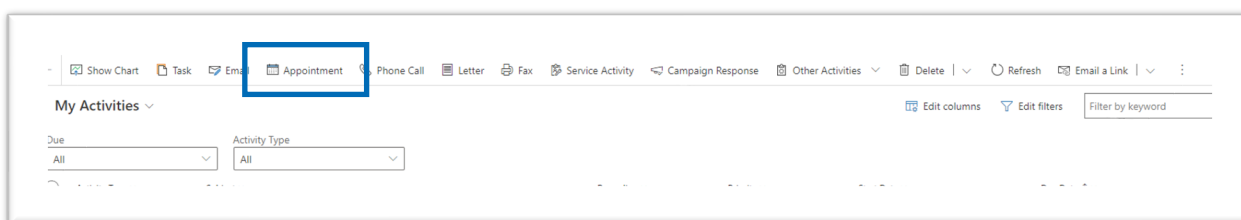
Security role required:	_SLSNZ – Admin Level 1 (Club) OR _SLSNZ-Admin Level 2 (Regional) OR _SLSNZ Base Role
-------------------------	--

Points to note:

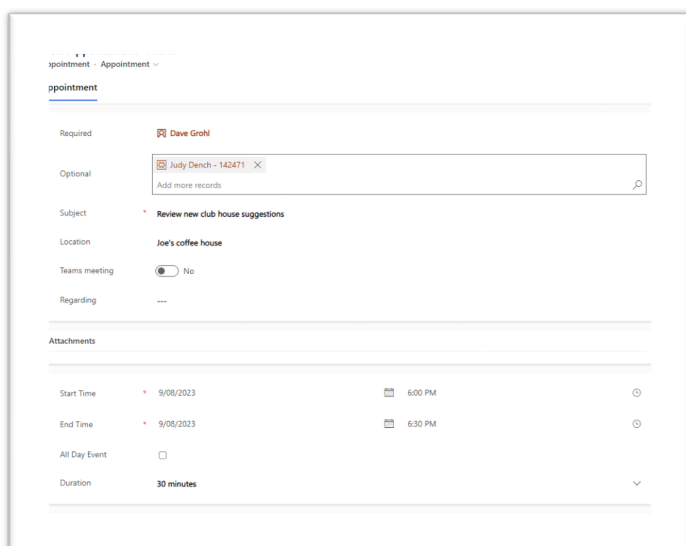
1. You will only have access to the Activities that you create or are assigned to you.
2. An Activity is a record of an interaction. They are not linked to a member.

CREATE AN ACTIVITY

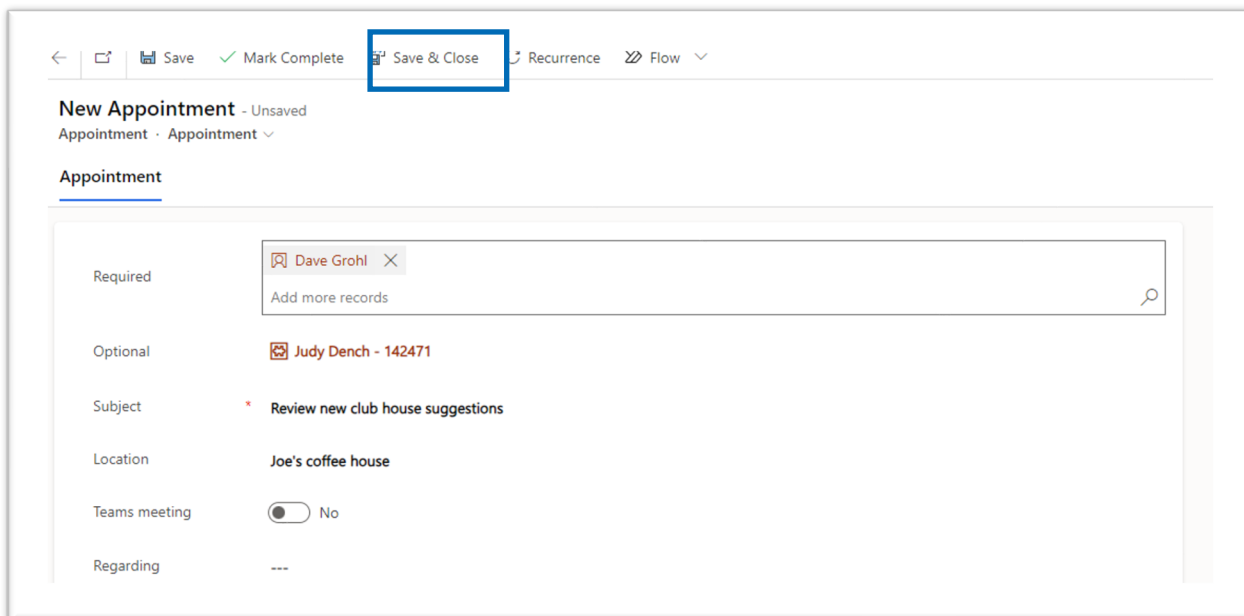
Step	Person	System	Step
1.	Admin	CRM	In the Membership module, go to Activities. This will default to All Activities, but you can change the default to My Activities if you wish.
2.	Admin	CRM	Listed at the top of the screen are the types of activities you can create. Select one. This example uses <i>Appointment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



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.




← Save ✓ Mark Complete **Save & Close** Recurrence Flow

New Appointment - Unsaved
Appointment · Appointment

Appointment

Required  Dave Grohl 
Add more records

Optional  Judy Dench - 142471

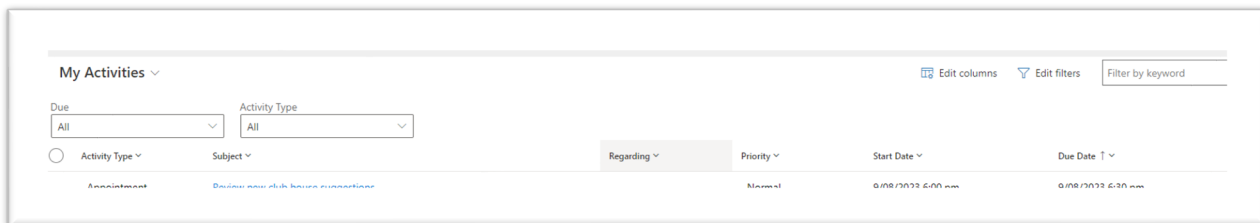
Subject * Review new club house suggestions

Location Joe's coffee house

Teams meeting ☐ No

Regarding ---

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.



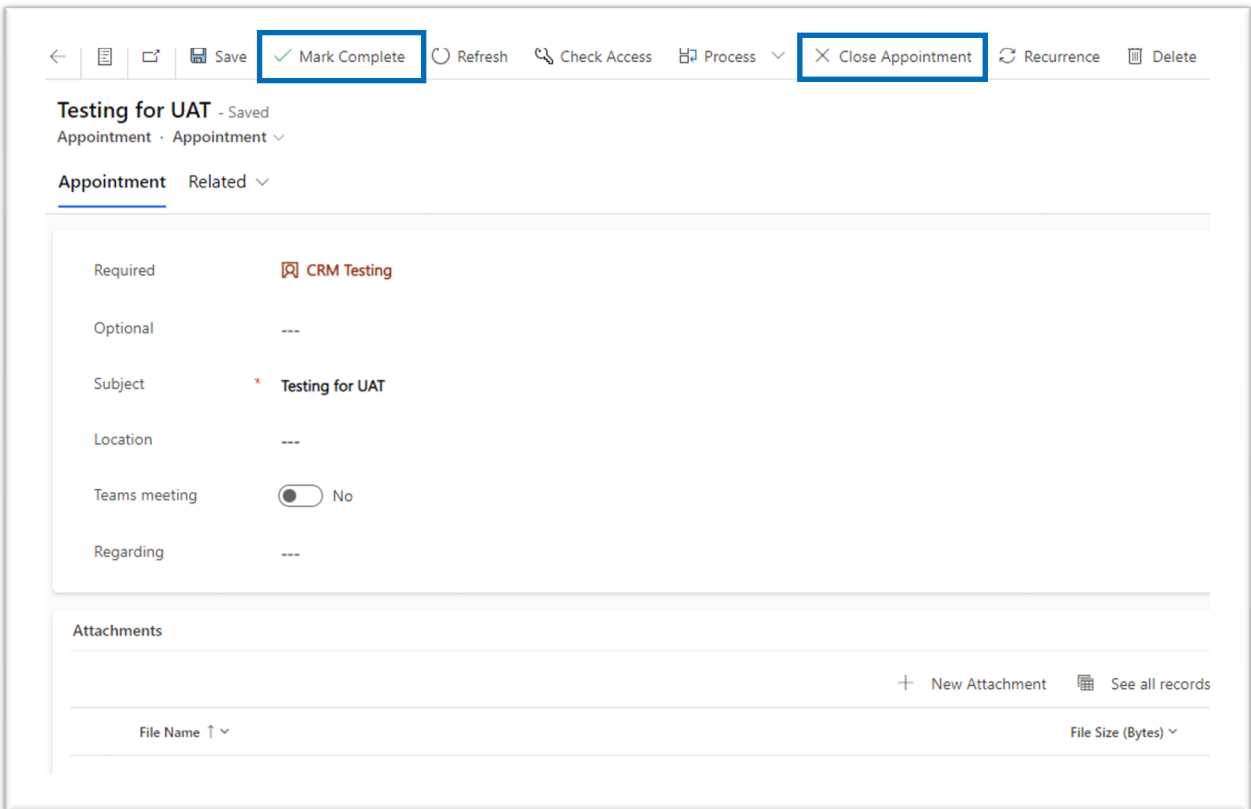
My Activities Edit columns Edit filters Filter by keyword

Due All Activity Type All

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Appointment	Review new club house suggestions	Normal	Normal	01/08/2022 6:00 am	01/08/2022 6:30 am


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



The screenshot shows the CRM interface for an appointment titled "Testing for UAT". The top toolbar contains several buttons: "Save", "Mark Complete" (highlighted with a blue box), "Refresh", "Check Access", "Process", "Close Appointment" (highlighted with a blue box), "Recurrence", and "Delete". Below the toolbar, the appointment details are displayed, including fields for "Required" (CRM Testing), "Optional", "Subject" (Testing for UAT), "Location", "Teams meeting" (No), and "Regarding". At the bottom, there is an "Attachments" section with a "New Attachment" button and a "See all records" link.

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 <i>My Activities</i> .
----	-------	-----	---



The screenshot shows the CRM interface after the appointment has been marked as complete. A message at the top states "Read-only This record's status: Completed". The appointment details are now "Testing as regional admin". The status is updated to "Completed" (highlighted with a blue box), and the priority is "Normal". The owner is "CRM Testing".

Reports

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

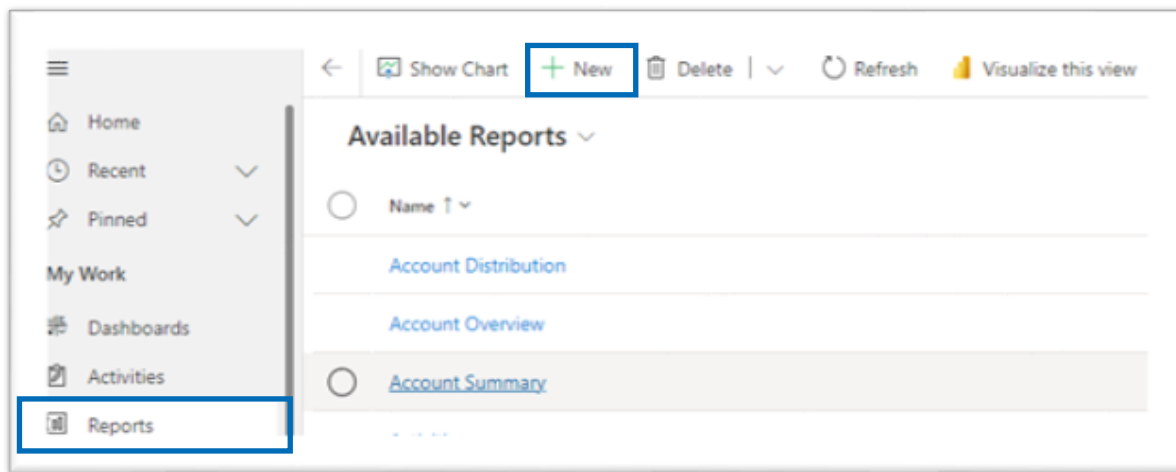
Points to note:

1. Your access allows you to create and run your own reports.

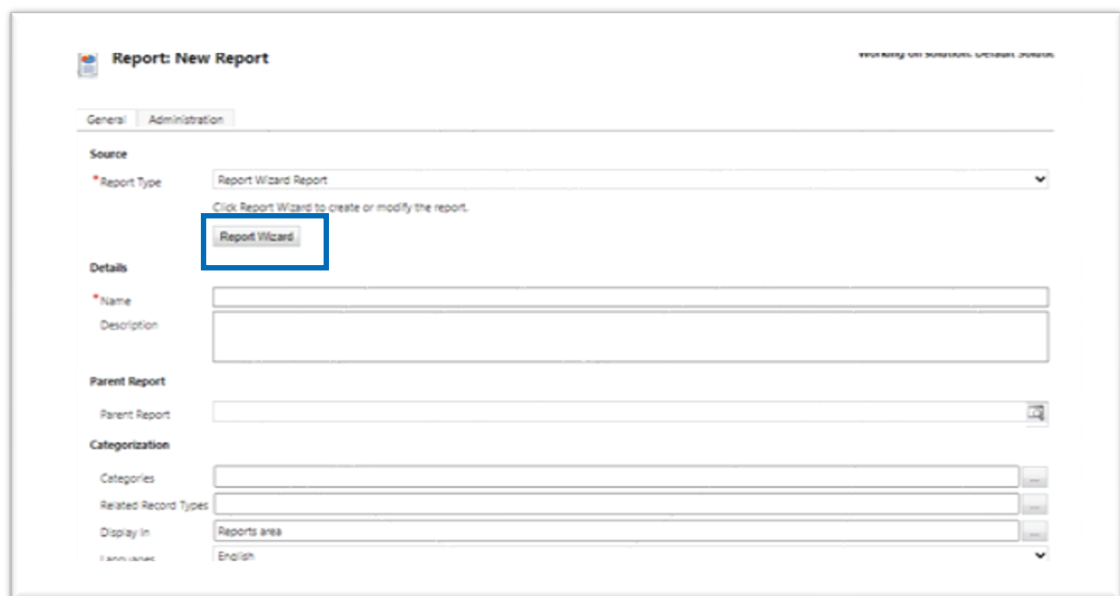
CREATE A NEW REPORT

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 <i>Clubs</i> . 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	<p>Add the fields you want the report to pull data from.</p> <ul style="list-style-type: none">○ If you want all the data in that field, select <i>Contains Data</i>.○ If you just want a report to show specific information, select <i>Equals</i> and then tell the report what information you want from those fields. <p>Then click Next.</p>
----	-------	-----	--

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

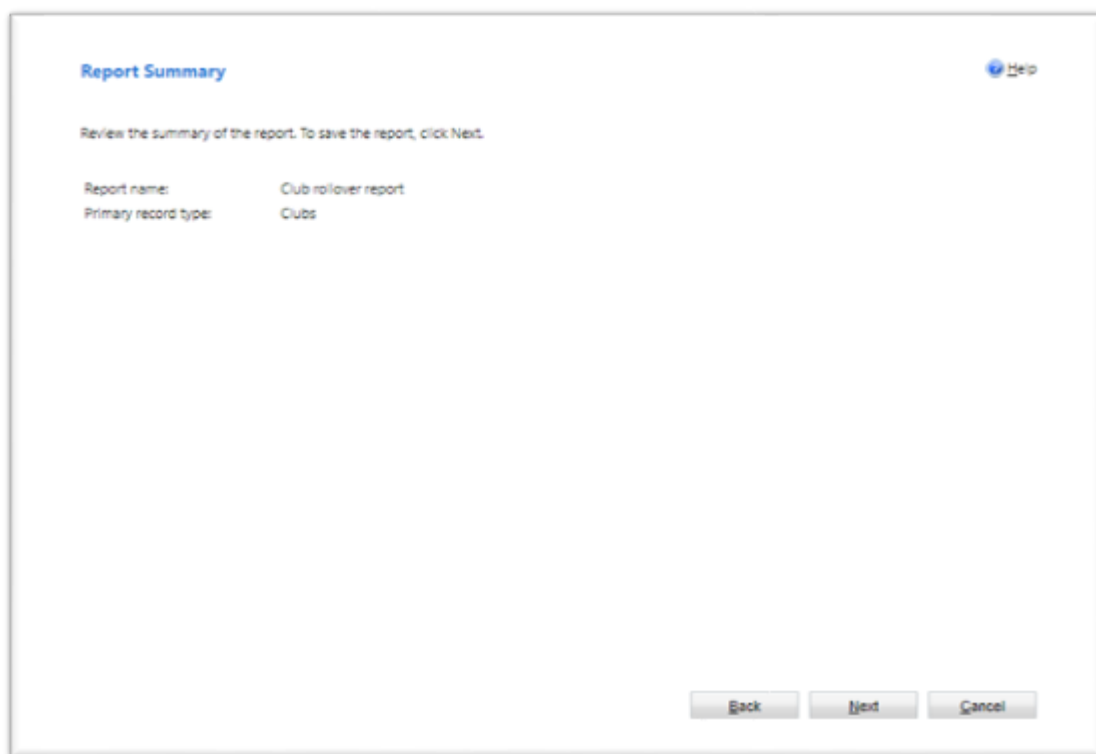
- Region Equals Central Region/Eastern Regi...
- Club Contains Data
- Current Season Contains Data
- Run End of Season Contains Data
- Run Start of Season Contains Data

Select

Back Next Cancel

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

7.	Admin	CRM	Click Next.
----	-------	-----	-------------



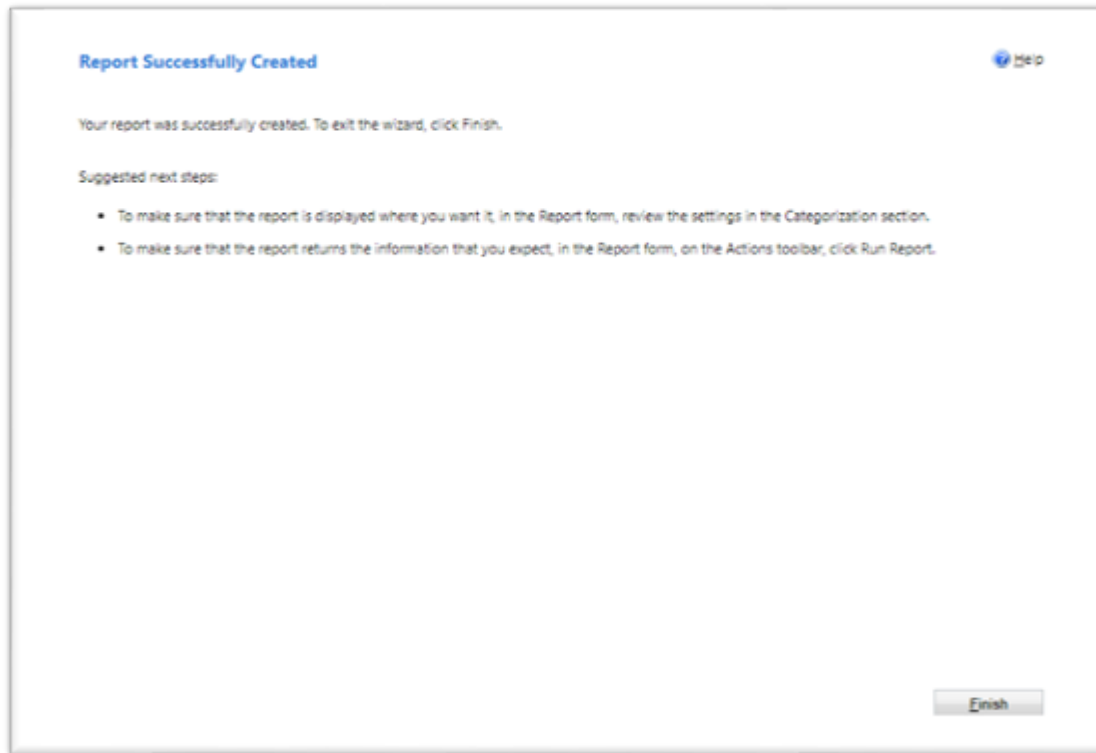
Report Summary [Help](#)

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:
----	-------	-----	---------------



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

http://www.surf lifesaving nz.co.nz/crmreports/reportproperty.aspx?id=%7b5158D6FC-3336-EE11-BDF4-000D3AE1A9C0%7d&fro...

Save and Close Run Report

Report: Club Rollover Report Working on solution: Default Solution

! Your report has been saved. You can edit the properties of the report, or close this form.

General Administration

Source

Report Type Report Wizard Report

Click Report Wizard to create or modify the report.

Report Wizard

Details

Name Club Rollover Report

Description

Parent Report

Parent Report

Categorization

Categories

Related Record Types Cubs

Display In Forms for related record types/Lists for related record types/Reports area


Languages English

Clubs

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

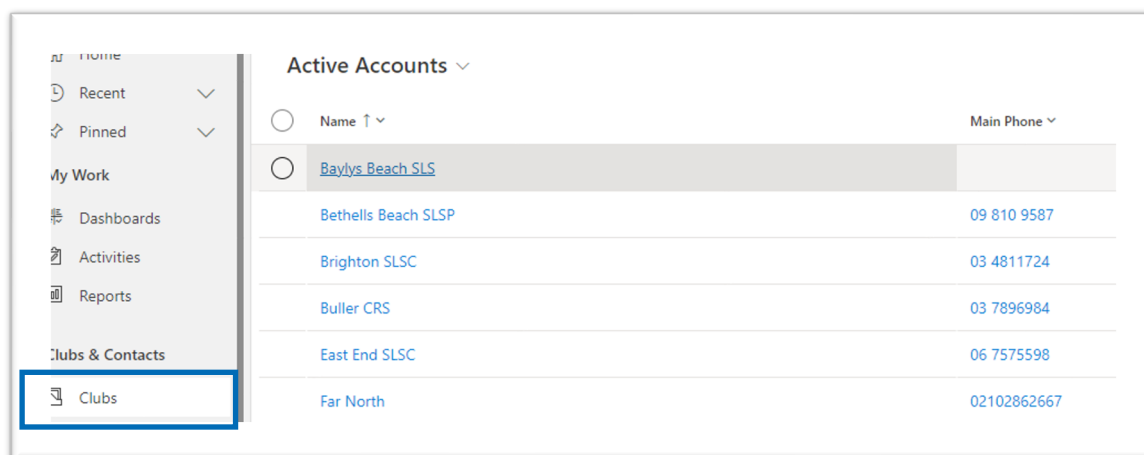
Points to note:

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

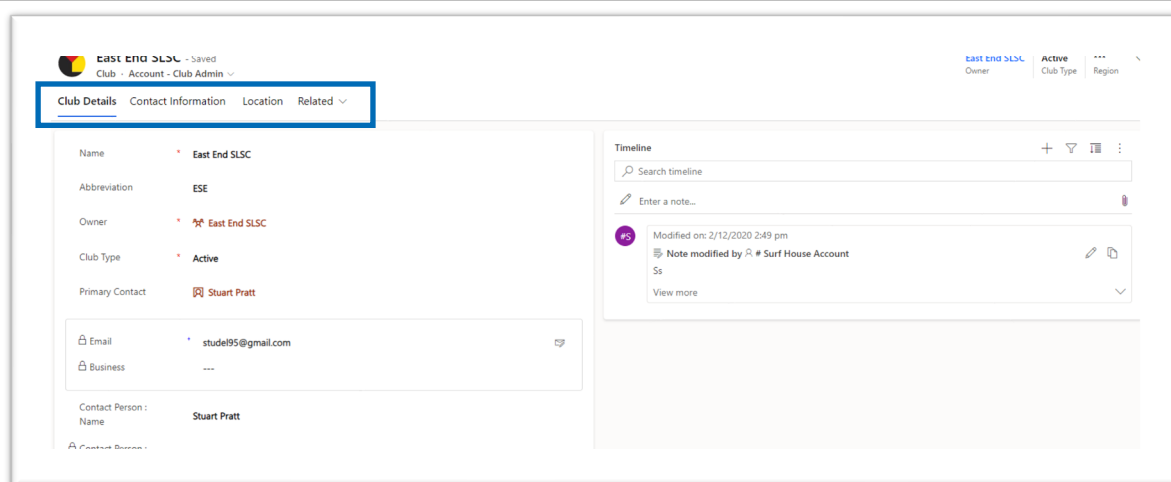
Step	Person	System	Step
1.	Admin	CRM	In the Membership module, select Clubs and click on the Club you want to edit.



Active Accounts ▾

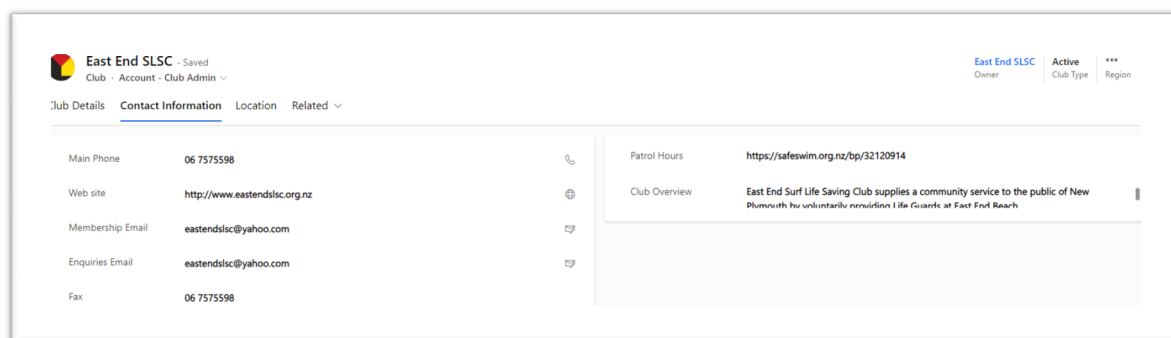
<input type="radio"/> Name ↑ ▾	Main Phone ▾
<input type="radio"/> Baylys Beach SLS	
Bethells Beach SLSP	09 810 9587
Brighton SLSC	03 4811724
Buller CRS	03 7896984
East End SLSC	06 7575598
Far North	02102862667

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
----	-------	-----	---

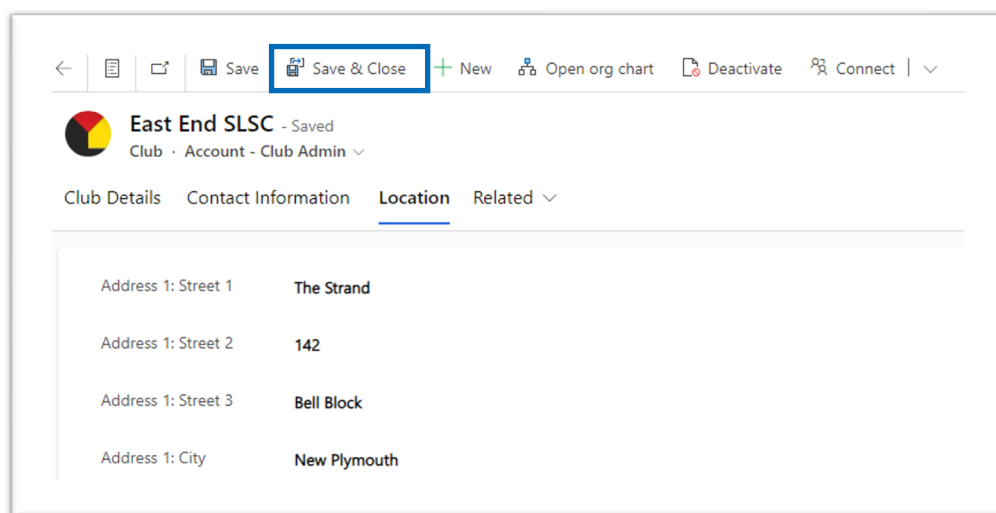
Contact Info tab



Website

<p>Club Details</p> <p>Email: eastendslsc@yahoo.com</p> <p>Website: http://www.eastendslsc.org.nz</p> <p>Phone: 06 7575598</p> <p>Fax: 06 7575598</p> <p>Contact: Stuart Pratt</p>	<p>Addresses</p> <p>Physical</p> <p>Nobs Line Strandon New Plymouth 4312</p> <p>Postal</p> <p>PO Box 3399 Fitzroy New Plymouth 4340</p>
<p>Club Overview</p> <p>East End Surf Life Saving Club supplies a community service to the public of New Plymouth by voluntarily providing Life Guards at East End Beach. 2011 Cadet Cup (Taranaki) for Overall Junior Points</p>	

4.	Admin	CRM	Make your update, then click Save and Close. The update will be made to the website within 24hrs.
----	-------	-----	---

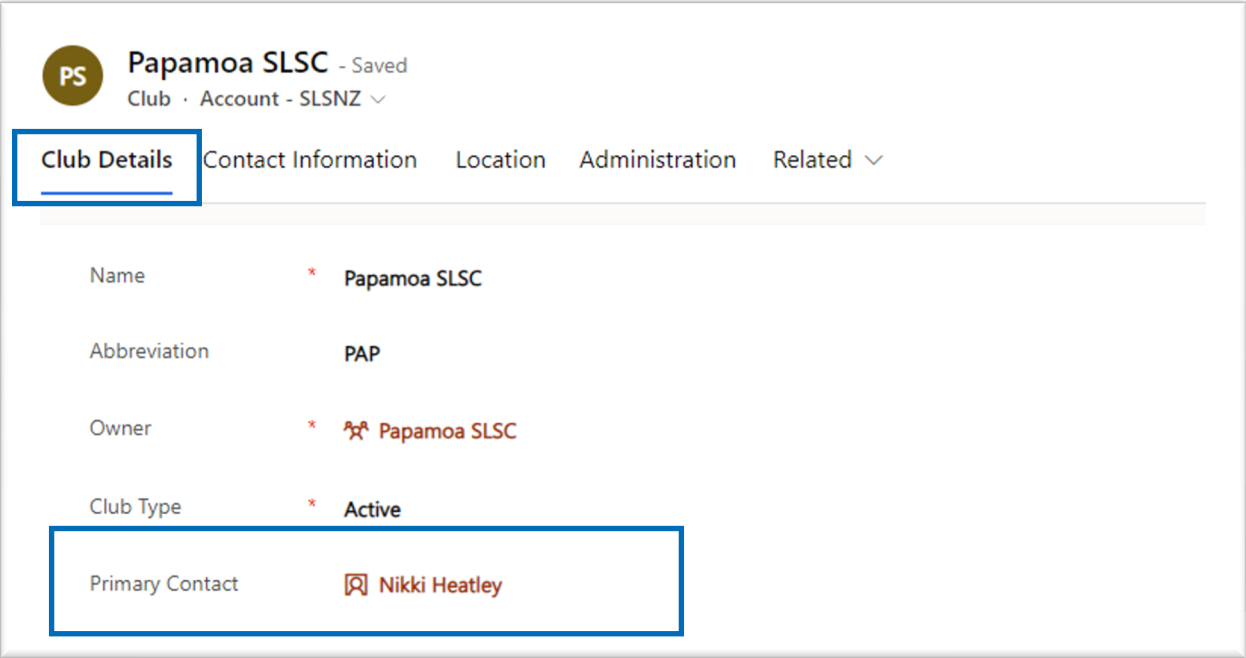


The screenshot shows the 'East End SLSC - Saved' page in the CRM system. The 'Location' tab is selected, displaying the following address information:

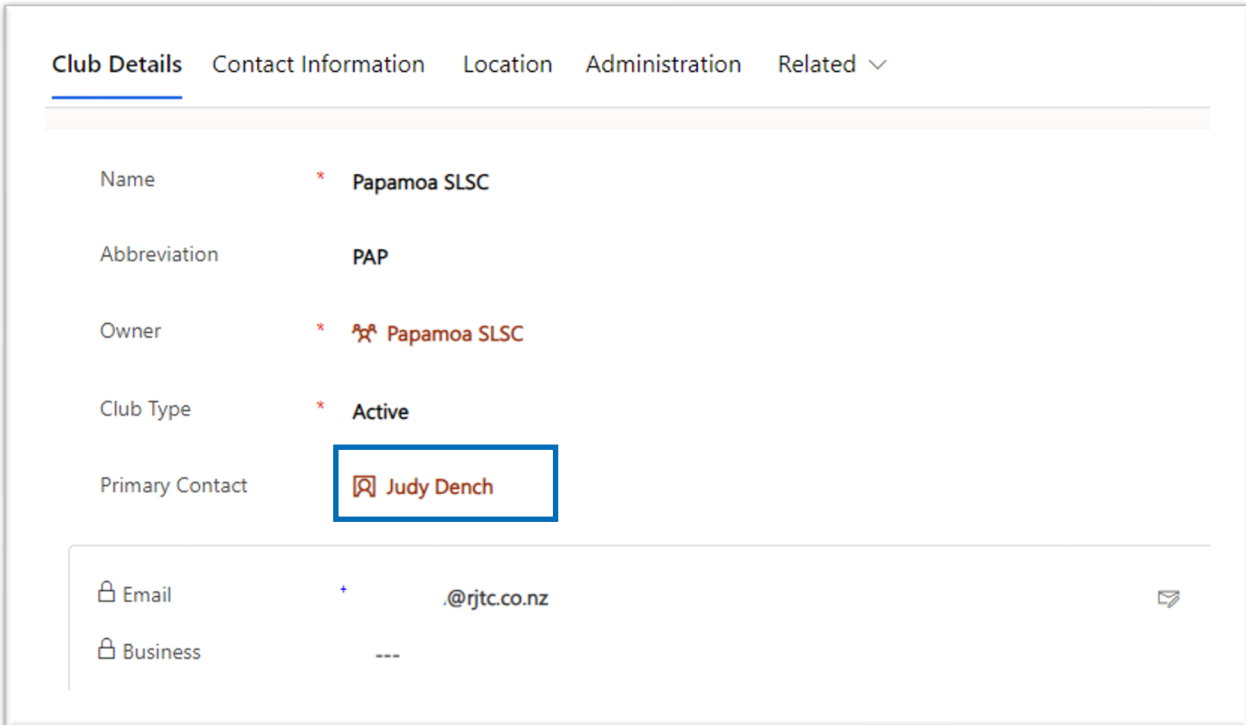
Address 1: Street 1	Address 1: Street 2	Address 1: Street 3	Address 1: City
The Strand	142	Bell Block	New Plymouth

UPDATE THE PRIMARY CONTACT

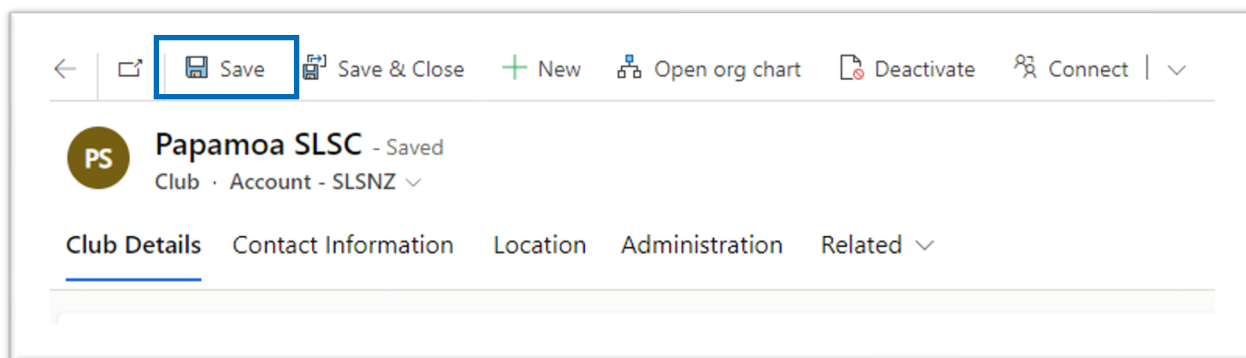
1.	Admin	CRM	The Primary Contact is located on the Club Details tab
----	-------	-----	--



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.
----	-------	-----	---

<div>  </div>			
---	--	--	--

3. Admin CRM Click Save

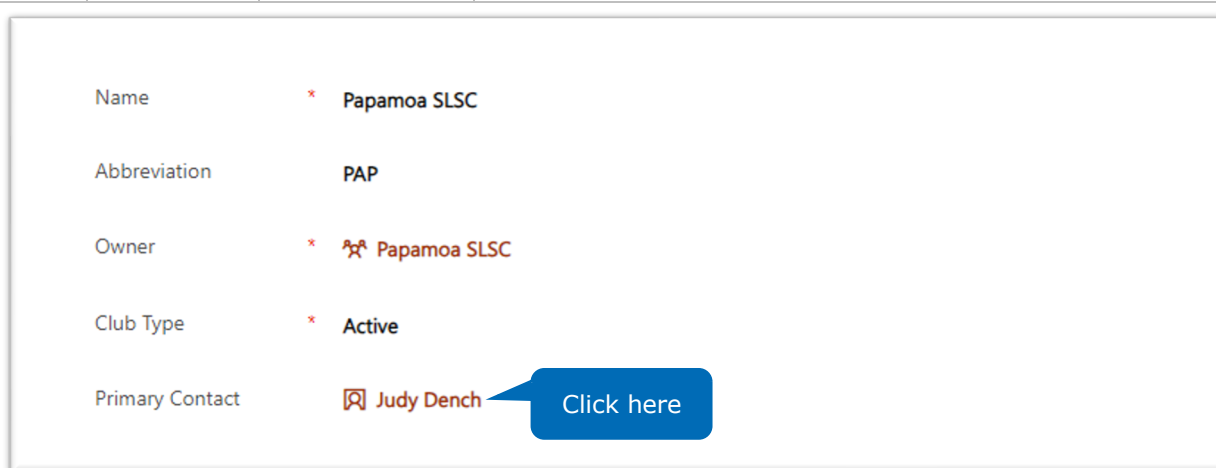


← Save Save & Close + New Open org chart Deactivate Connect | v

PS Papamoa SLSC - Saved
Club · Account - SLSNZ v

Club Details Contact Information Location Administration Related v

4. Admin CRM Click on the new contact's name to go to the Contact screen



Name * Papamoa SLSC

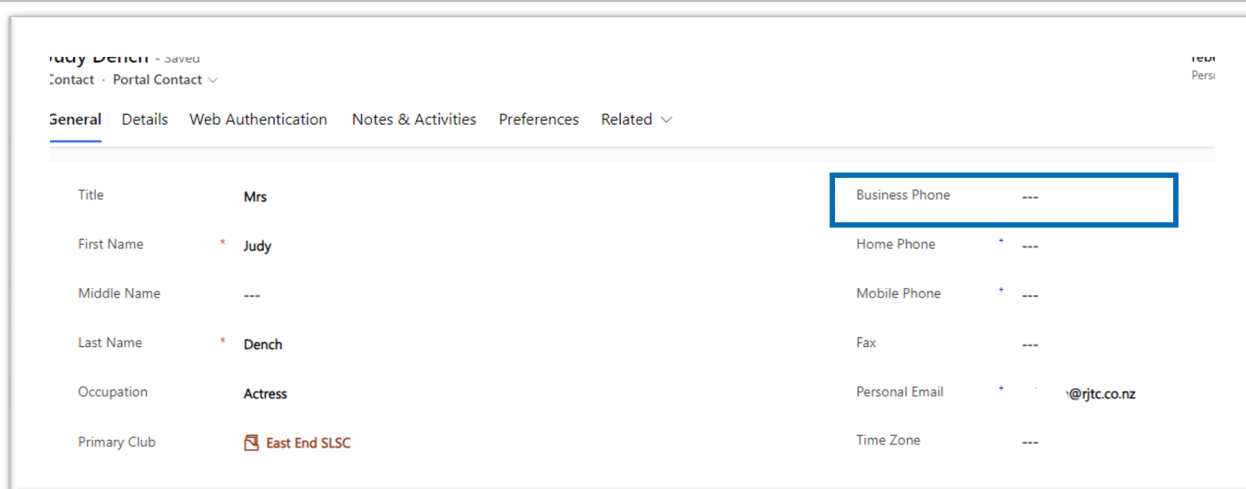
Abbreviation PAP

Owner * Papamoa SLSC

Club Type * Active

Primary Contact Judy Dench Click here

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.)



Judy Dench - Saved
Contact · Portal Contact v

General Details Web Authentication Notes & Activities Preferences Related v

Title Mrs Business Phone ---

First Name * Judy Home Phone + ---

Middle Name --- Mobile Phone + ---

Last Name * Dench Fax ---

Occupation Actress Personal Email + @rjtc.co.nz


Primary Club East End SLSC Time Zone ---

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.

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

QUALIFICATIONS

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


Judy Dench - Saved
Contact

142471
SLSNZ ID Number

Titahi Bay SLSC
Primary Club

Titahi Bay SLSC
Owner

Summary
 Contact Information
 Qualifications
Awards
 Related

QUALIFICATIONS

Surf Lifeguard Award	No	
Surf Lifeguard Award (+Refresher) Expiry Date	---	
Senior Lifeguard Award - IRB	No	
Senior Lifeguard Award - IRB (+Refresher) Expiry date	---	
IRB Crewpersons Module	No	
Junior Surf 200m	No	
Cafatu Raranga	No	

LMS


LMS Status	In LMS
LMS Admin Level	None
LMS Modified Date	1/08/2023
SLSNZ Employee	No
Seasonal Staff	No

INTERESTS

Coaching	Yes
----------	-----

AWARDS

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


Judy Dench - Saved
Contact

142471
SLSNZ ID Number

Titahi Bay SLSC
Primary Club

Titahi Bay SLSC
Owner

[Summary](#)
[Contact Information](#)
[Qualifications](#)
[Awards](#)
[Related](#)

Active Award Recipients					+ New Award Recipient + Add Existing Award Re... ↻ Refresh ⋮
Club	Member	Award	Date Awarded	Date of Expiry	
Titahi Bay SLSC	Judy Dench - 142471	Be Safer Module	1/08/2023		
Titahi Bay SLSC	Judy Dench - 142471	Coffee maker of the year	16/07/2023	31/01/2025	

1 - 2 of 2
 Page 1

Membership

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

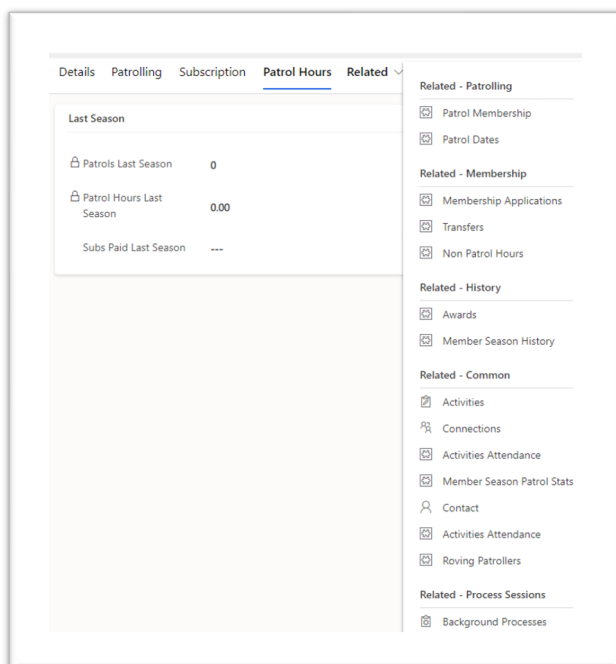
Points to note:

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:

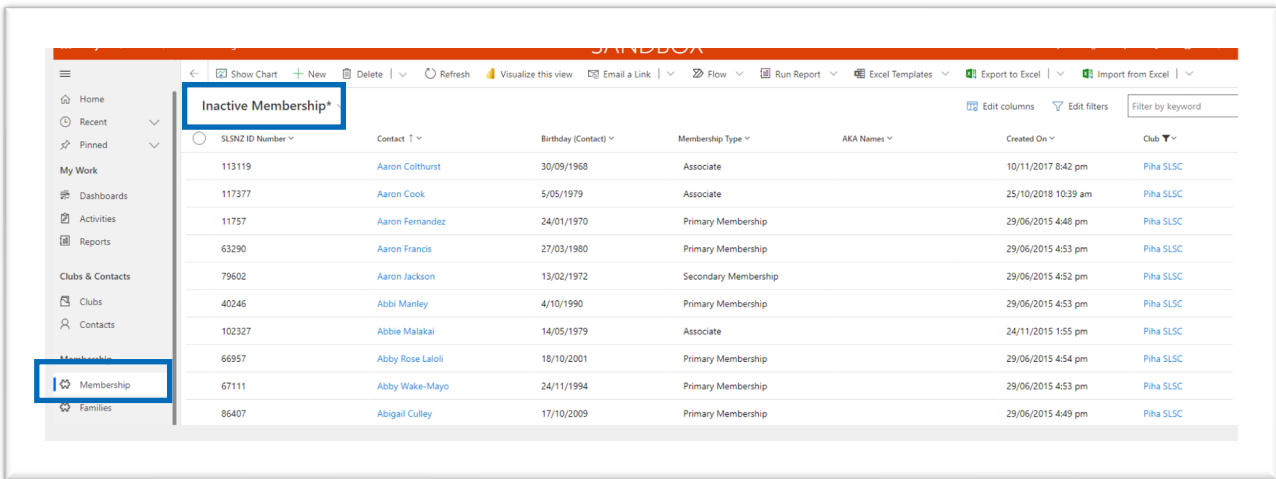


RENEW A MEMBERSHIP IN THE CRM

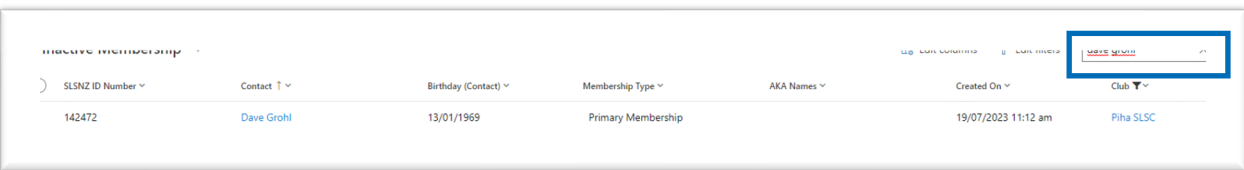
If an existing member wants to return this season and become an active member you need to find their inactive membership record and roll it over into the current season.

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

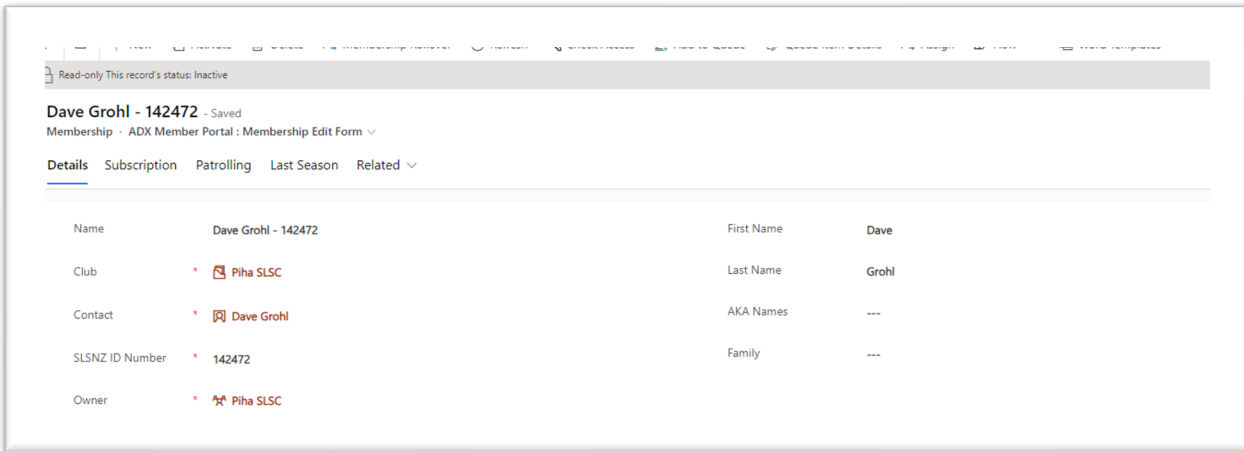
Step	Person	System	Step
1.	Member	N/A	Makes request to renew
2.	Club admin	CRM	In the CRM Membership module, go to Memberships and filter by Inactive Memberships.



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
----	------------	-----	----------------------------

[New](#)
[Activate](#)
[Delete](#)
[Membership Rollover](#)
[Refresh](#)
[Check Access](#)
[Add to Queue](#)
[Queue Item Details](#)
[Assign](#)
[Flow](#)
[Word Templates](#)

Read-only This record's status: Inactive

Dave Grohl - 142472 - Saved
Membership - ADX Member Portal : Membership Edit Form

[Details](#)
[Subscription](#)
[Patrolling](#)
[Last Season](#)
[Related](#)

Name	Dave Grohl - 142472	First Name	Dave
Club	* Piha SLSC	Last Name	Grohl
Contact	* Dave Grohl	AKA Names	---
SLSNZ ID Number	* 142472	Family	---
Owner	* Piha SLSC		

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

Confirm Application of Workflow ×

This workflow will be applied to 1 Membership.

Are you sure that you want to continue?

OK

Cancel

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.
<div><div><div><div>Home</div><div>Recent</div><div>Pinned</div><div>My Work</div><div>Dashboards</div><div>Activities</div><div>Reports</div><div>Clubs & Contacts</div><div>Clubs</div><div>Contacts</div><div>Membership</div><div>Membership</div><div>Families</div></div><div><div>Inactive Membership*</div><div><div><div>SLSNZ ID Number</div><div>Contact</div><div>Birthday (Contact)</div><div>Membership Type</div><div>AKA Names</div><div>Created On</div></div><div><div>113119</div><div>Aaron Colthurst</div><div>30/09/1968</div><div>Associate</div><div></div><div>10/07/2023</div></div><div><div>117377</div><div>Aaron Cook</div><div>5/05/1979</div><div>Associate</div><div></div><div>25/07/2023</div></div><div><div>11757</div><div>Aaron Fernandez</div><div>24/01/1970</div><div>Primary Membership</div><div></div><div>29/07/2023</div></div><div><div>63290</div><div>Aaron Francis</div><div>27/03/1980</div><div>Primary Membership</div><div></div><div>29/07/2023</div></div><div><div>79602</div><div>Aaron Jackson</div><div>13/02/1972</div><div>Secondary Membership</div><div></div><div>29/07/2023</div></div><div><div>40246</div><div>Abbi Manley</div><div>4/10/1990</div><div>Primary Membership</div><div></div><div>29/07/2023</div></div><div><div>102327</div><div>Abbie Malakai</div><div>14/05/1979</div><div>Associate</div><div></div><div>24/07/2023</div></div><div><div>66957</div><div>Abby Rose Laloli</div><div>18/10/2001</div><div>Primary Membership</div><div></div><div>29/07/2023</div></div><div><div>67111</div><div>Abby Wake-Mayo</div><div>24/11/1994</div><div>Primary Membership</div><div></div><div>29/07/2023</div></div><div><div>86407</div><div>Abigail Culley</div><div>17/10/2009</div><div>Primary Membership</div><div></div><div>29/07/2023</div></div></div></div></div></div>			
3.	Club admin	CRM	Use the search option to find the record you want to make active
<div><div><div><div>inactive membership</div><div><div><div>SLSNZ ID Number</div><div>Contact</div><div>Birthday (Contact)</div><div>Membership Type</div><div>AKA Names</div><div>Created On</div></div><div><div>142472</div><div>Dave Grohl</div><div>13/01/1969</div><div>Primary Membership</div><div></div><div>19/07/2023</div></div></div></div></div></div>			
4.	Club admin	CRM	Double click on the record to open it



SURF LIFE SAVING®
NEW ZEALAND

Read-only This record's status: Inactive

Dave Grohl - 142472 - Saved
Membership - ADX Member Portal : Membership Edit Form

Details Subscription Patrolling Last Season Related

Name	Dave Grohl - 142472	First Name	Dave
Club	* Piha SLSC	Last Name	Grohl
Contact	* Dave Grohl	AKA Names	---
SLSNZ ID Number	* 142472	Family	---
Owner	* Piha SLSC		

5. Club admin CRM Select Membership Rollover

New Activate Delete Membership Rollover Refresh Check Access Add to Queue Queue Item Details Assign Flow Word Templates

Read-only This record's status: Inactive

Dave Grohl - 142472 - Saved
Membership - ADX Member Portal : Membership Edit Form

Details Subscription Patrolling Last Season Related

Name	Dave Grohl - 142472	First Name	Dave
Club	* Piha SLSC	Last Name	Grohl
Contact	* Dave Grohl	AKA Names	---
SLSNZ ID Number	* 142472	Family	---
Owner	* Piha SLSC		

6. Club admin CRM Confirm the request

Confirm Application of Workflow ×

This workflow will be applied to 1 Membership.

Are you sure that you want to continue?

OK
Cancel

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

7

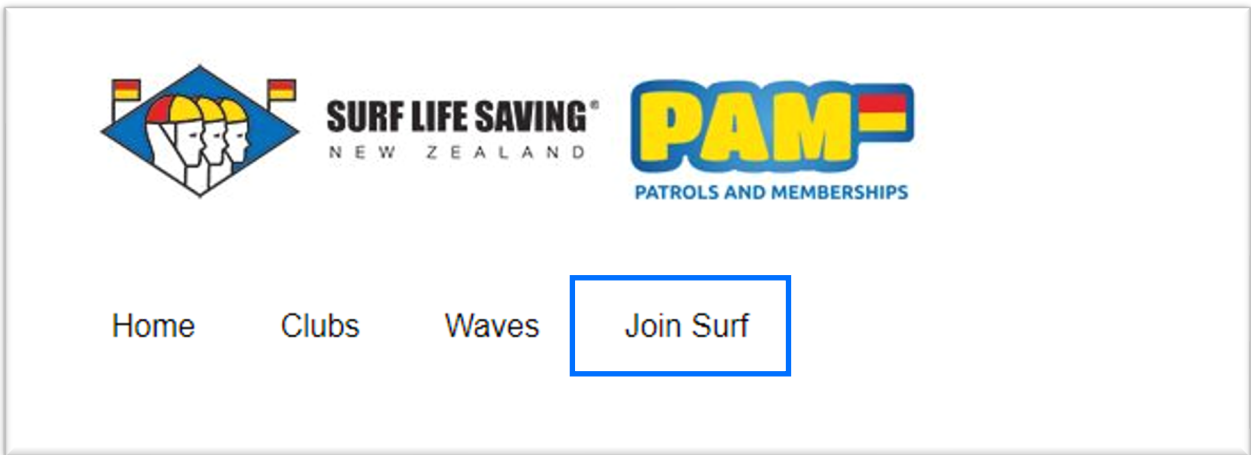
Points to note:

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 <i>Join Surf</i> from the navigation bar

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 <i>Submit</i> button at the bottom of the form to submit application
----	-----------	---------------	--

INTERESTS

Coaching

Patrolling

Junior Surf

Sport

Officials

Power Craft

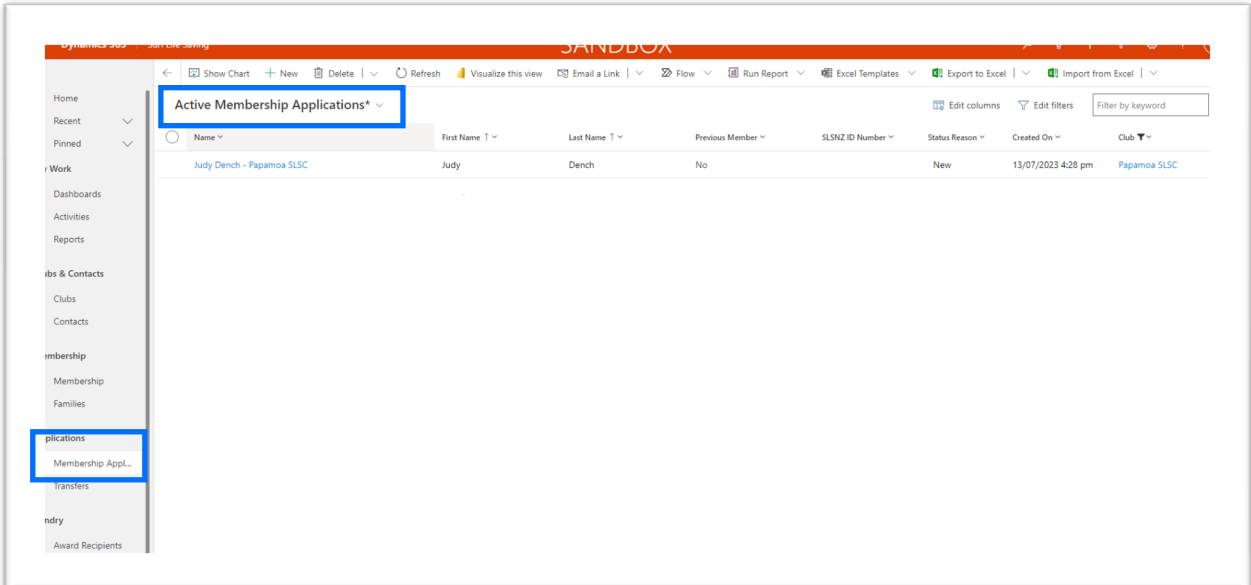
Supporter

[Surf Life Saving NZ Membership Terms & Conditions](#)

☒ I accept the terms and conditions outlined above *

Submit

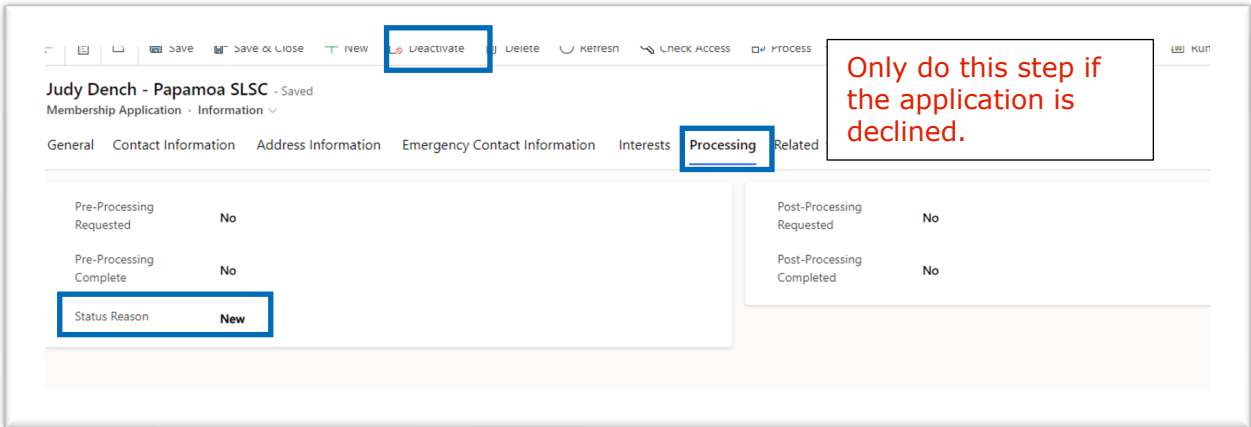
5	Workflow	CRM	Create new Membership Application record
6.	Club admin	CRM	Locate membership application. Go to Membership Module > Membership Applications > Active Membership Applications Double click on the record to open it.



The screenshot shows a CRM interface with a sidebar on the left containing various modules. The 'Applications' module is highlighted, and a sub-item 'Membership Appl...' is also highlighted. The main content area displays a table titled 'Active Membership Applications'. The table has columns for Name, First Name, Last Name, Previous Member, SLSNZ ID Number, Status Reason, Created On, and Club. A single record is visible: Judy Dench - Papamoa SLSC, with first name Judy, last name Dench, previous member status No, SLSNZ ID Number, Status Reason New, Created On 13/07/2023 4:28 pm, and Club Papamoa SLSC.

7.	Club admin	CRM	Complete checks. Ensure the member does not already exist in CRM. Does the member exist already?						
			<table><tr><th>If</th><th>Then</th></tr><tr><td>Yes</td><td>Contact the member to ascertain whether they want to Transfer a member or request a Secondary memberships.</td></tr><tr><td>No</td><td>Go to step 8</td></tr></table>	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
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?						
			<table><tr><th>If</th><th>Then</th></tr><tr><td>Yes</td><td>Go to step 9</td></tr><tr><td>No</td><td>Go to the processing tab and change the Status Reason to Cancelled Then click Deactivate to remove the record from the Active list.</td></tr></table>	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.
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.								



Judy Dench - Papamoa SLSC - Saved
Membership Application - Information

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related

Pre-Processing Requested No

Pre-Processing Complete No

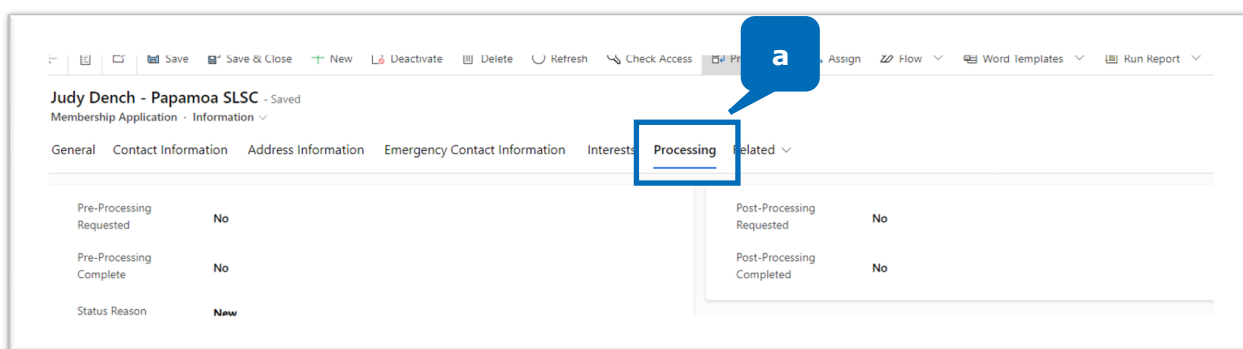
Status Reason **New**

Post-Processing Requested No

Post-Processing Completed No

Only do this step if the application is declined.

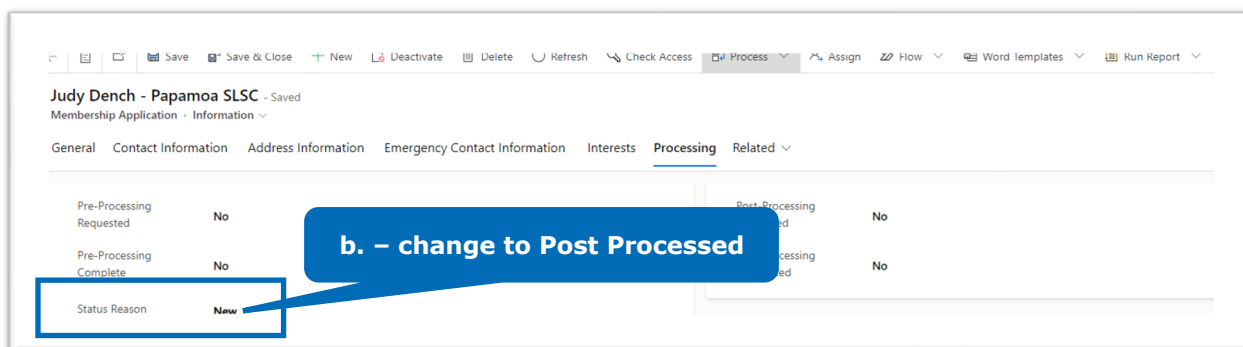
9.	Club admin	CRM	<p>Update the processing screen</p> <ol style="list-style-type: none"> Click on the <i>Processing</i> tab Change the <i>Status Reason</i> to Post Processed Change the <i>Post Processing</i> Requested to Yes (this starts the workflow to create the Contact and Membership) Change the <i>Post Processing</i> Completed to Yes Click <i>Save</i> Then click <i>Deactivate</i> to remove the record from the Active Applications.
----	------------	-----	---



Judy Dench - Papamoa SLSC - Saved
Membership Application · Information

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related

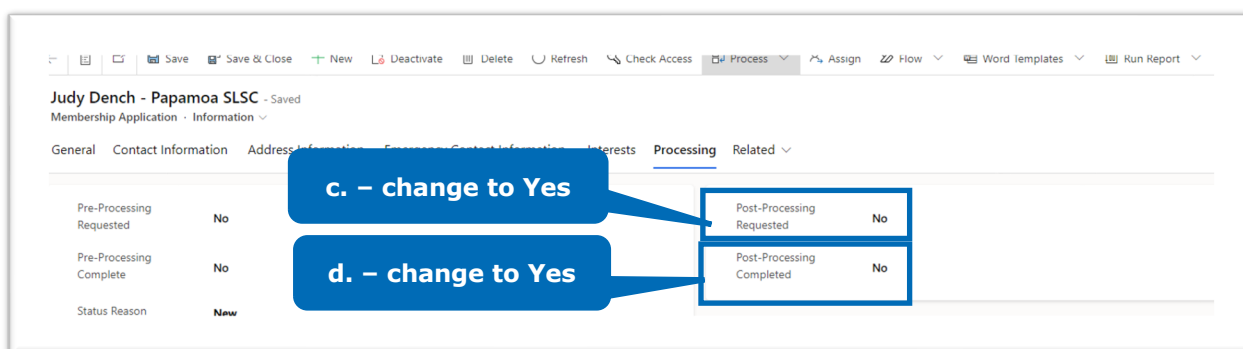
Pre-Processing Requested	No	Post-Processing Requested	No
Pre-Processing Complete	No	Post-Processing Completed	No
Status Reason	New		



Judy Dench - Papamoa SLSC - Saved
Membership Application · Information

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related

Pre-Processing Requested	No	Post-Processing Requested	No
Pre-Processing Complete	No	Post-Processing Completed	No
Status Reason	New		



Judy Dench - Papamoa SLSC - Saved
Membership Application · Information

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related

Pre-Processing Requested	No	Post-Processing Requested	No
Pre-Processing Complete	No	Post-Processing Completed	No
Status Reason	New		

Save Save New Deactivate Delete Refresh Check Access Process Assign Flow Word Templates Run Report

Judy Dench - Papamoa SLSC - Saved
Membership Application - Information

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related

Pre-Processing Requested	No	Post-Processing Requested	No
Pre-Processing Complete	No	Post-Processing Completed	No
Status Reason	New		

Save Save & Close New Deactivate Delete Refresh Check Access Process Assign Flow Word Templates Run Report

Judy Dench - Papamoa SLSC - Saved
Membership Application - Information

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related

Pre-Processing Requested	No	Post-Processing Requested	No
Pre-Processing Complete	No	Post-Processing Completed	No
Status Reason	New		

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

Active Contacts* Edit columns Edit filters Judy Dench

Full Name Personal Email Primary Club Business Phone

Judy Dench Papamoa SLSC

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

Judy Dench - 142471 - Saved
membership - Information

142471
SLSNZ ID Number

Details Patrolling Subscription Patrol Hours Related

Name	Judy Dench - 142471
Club	Papamoa SLSC
Contact	Judy Dench
Season	2022/2023
Membership Type	Primary Membership
Is Last Season	Yes
Is Current Season	No
Competition Category	
Owner	Papamoa SLSC

Primary Club	Papamoa SLSC
First Aid Level	
First Aid Expiry	
IRB Level	
IRB Refreshed Date	
SLGA Level	
SLGA Refreshed Date	
Birthdate	8/12/1994
Restricted Refer SLSNZ	No
Restricted Refer	

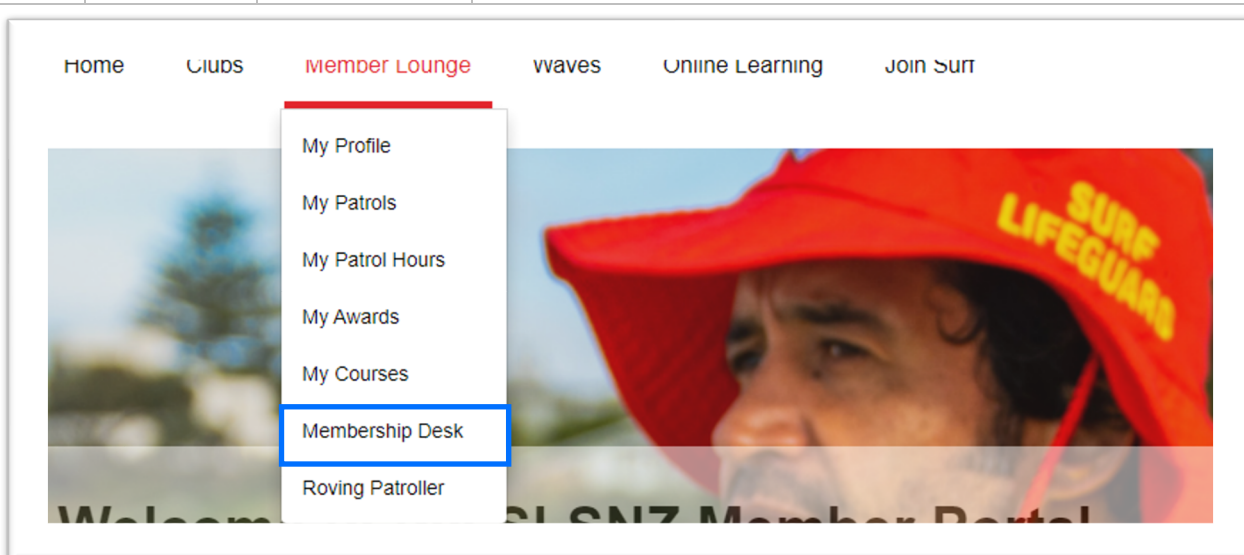
SECONDARY MEMBERSHIPS

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

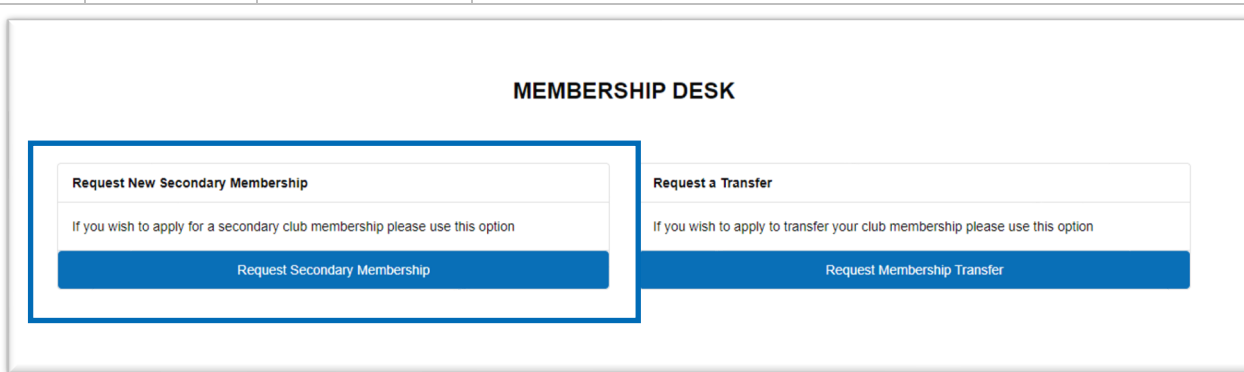
Points to note:

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.

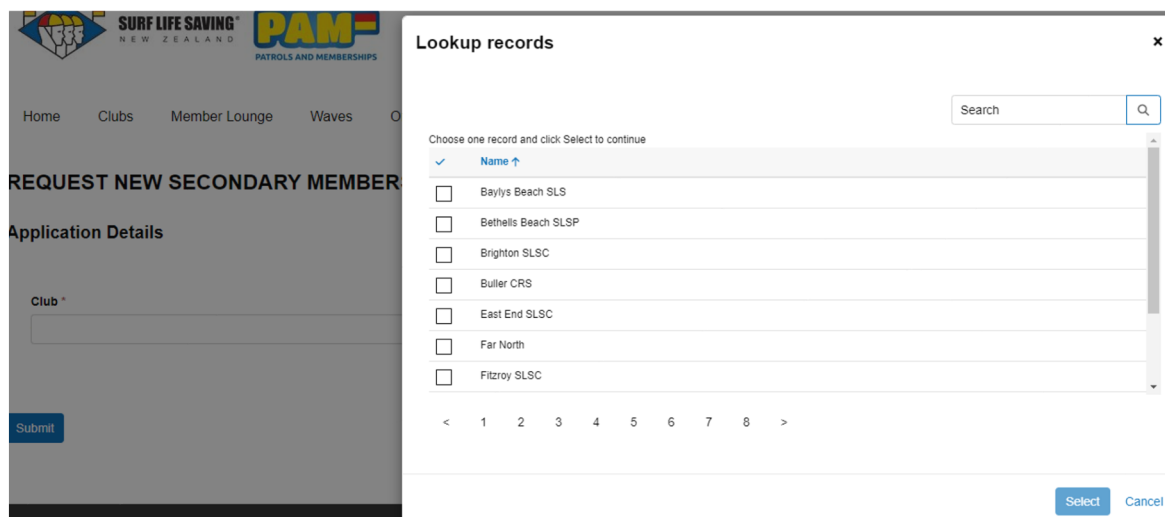
Step	Person	System	Step
1.	Applicant	Member Portal	Open member portal and logs in https://memberportal.surflifesaving.org.nz/
2.	Applicant	Member Portal	Go to Member Lounge > Membership Desk



3.	Applicant	Member Portal	Select <i>Request New Secondary Membership</i>
----	-----------	---------------	--



- | | | | |
|----|-----------|---------------|--|
| 4. | Applicant | Member Portal | Click on the magnifying glass and select the club you wish to join |
|----|-----------|---------------|--|



The screenshot shows the 'REQUEST NEW SECONDARY MEMBER' form on the Surf Life Saving New Zealand website. The form is titled 'REQUEST NEW SECONDARY MEMBER' and 'Application Details'. It has a 'Club *' dropdown menu and a 'Submit' button. A 'Lookup records' modal is open, showing a search bar and a list of clubs. The clubs listed are: Baylys Beach SLS, Bethells Beach SLSP, Brighton SLSC, Buller CRS, East End SLSC, Far North, and Fitzroy SLSC. The modal also has a 'Select' button and a 'Cancel' button.

- | | | | |
|----|-----------|---------------|--------------|
| 5. | Applicant | Member Portal | Click Submit |
|----|-----------|---------------|--------------|

REQUEST NEW SECONDARY MEMBERSHIP

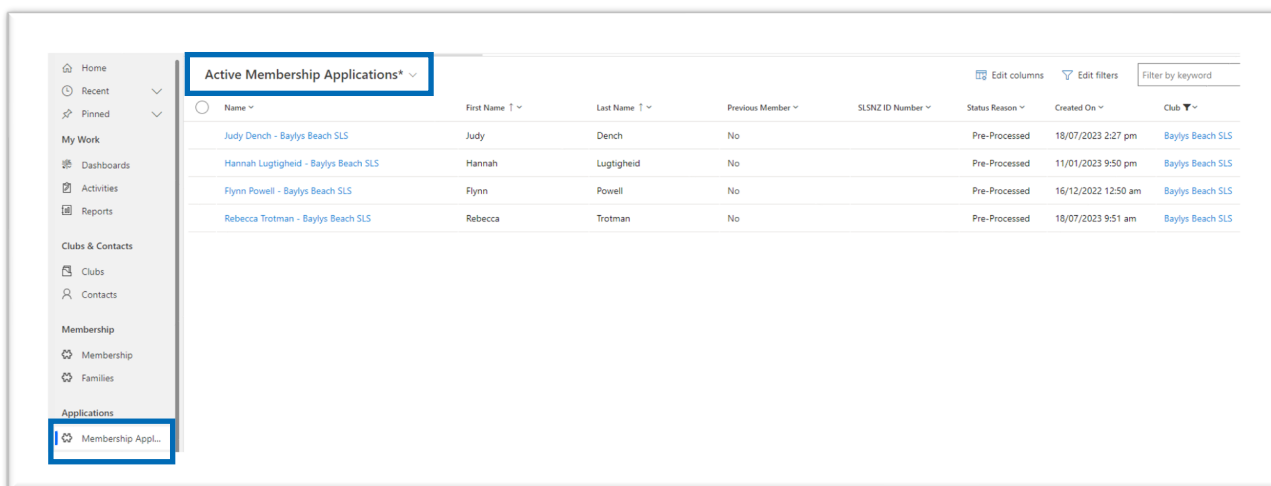
Application Details

Club *

Baylys Beach SLS

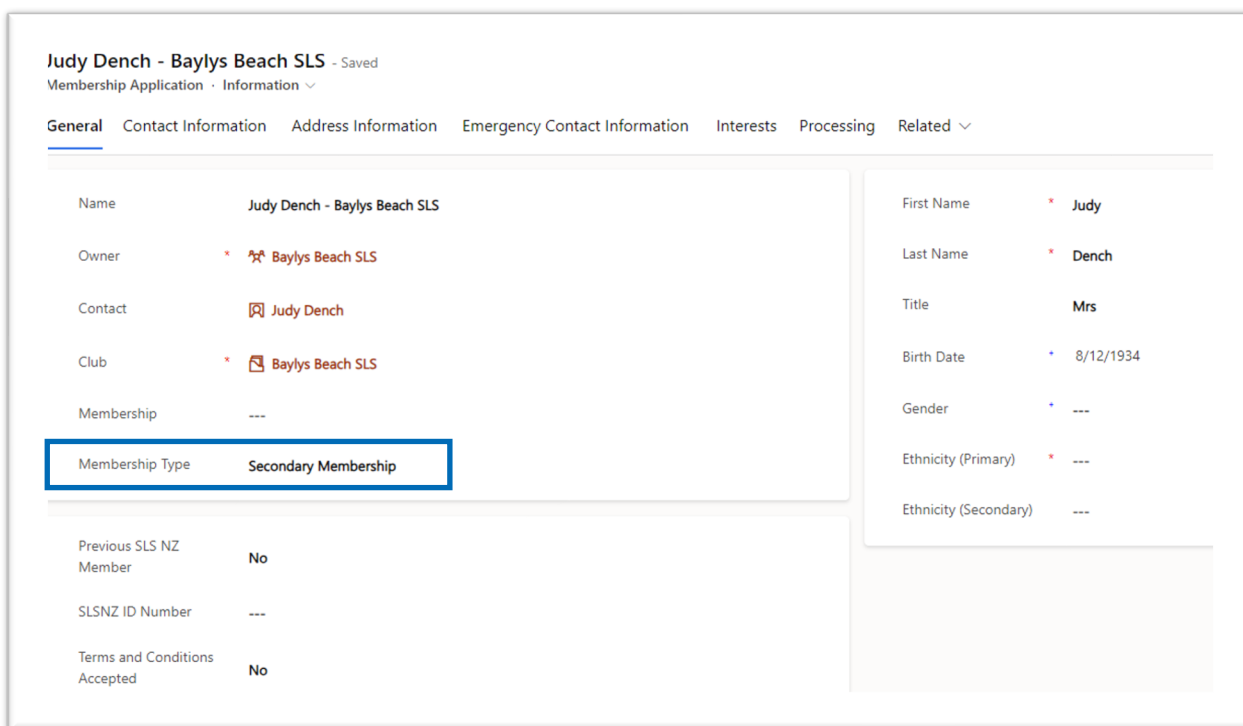
Submit

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



Name	First Name	Last Name	Previous Member	SLSNZ ID Number	Status Reason	Created On	Club
Judy Dench - Bayllys Beach SLS	Judy	Dench	No		Pre-Processed	18/07/2023 2:27 pm	Bayllys Beach SLS
Hannah Lugtigheid - Bayllys Beach SLS	Hannah	Lugtigheid	No		Pre-Processed	11/01/2023 9:50 pm	Bayllys Beach SLS
Flynn Powell - Bayllys Beach SLS	Flynn	Powell	No		Pre-Processed	16/12/2022 12:50 am	Bayllys Beach SLS
Rebecca Trotman - Bayllys Beach SLS	Rebecca	Trotman	No		Pre-Processed	18/07/2023 9:51 am	Bayllys Beach SLS

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.
----	------------	-----	--



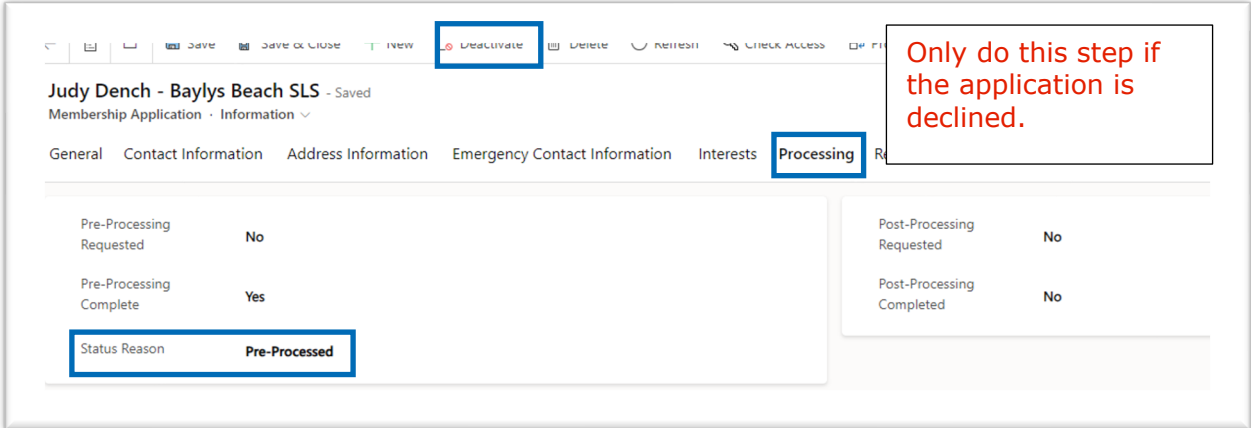
Judy Dench - Bayllys Beach SLS - Saved
Membership Application · Information

General | Contact Information | Address Information | Emergency Contact Information | Interests | Processing | Related

Name	Judy Dench - Bayllys Beach SLS	First Name	Judy
Owner	Bayllys Beach SLS	Last Name	Dench
Contact	Judy Dench	Title	Mrs
Club	Bayllys Beach SLS	Birth Date	8/12/1934
Membership	---	Gender	---
Membership Type	Secondary Membership	Ethnicity (Primary)	---
		Ethnicity (Secondary)	---
Previous SLS NZ Member	No		
SLSNZ ID Number	---		
Terms and Conditions Accepted	No		

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.



Judy Dench - Baylys Beach SLS - Saved
Membership Application · Information

General Contact Information Address Information Emergency Contact Information Interests **Processing**

Pre-Processing Requested	No
Pre-Processing Complete	Yes
Status Reason	Pre-Processed

Post-Processing Requested	No
Post-Processing Completed	No

Only do this step if the application is declined.

10.	Club admin	CRM	<p>Update the processing screen</p> <ol style="list-style-type: none"> Click on the <i>Processing</i> tab Change the <i>Status Reason</i> to Post Processed Change the <i>Post Processing</i> Requested to Yes (this starts the workflow to create the Contact and Membership) Change the <i>Post Processing</i> Completed to Yes Click <i>Save</i> Then click <i>Deactivate</i> to remove the record from the Active Applications.
-----	------------	-----	---

Judy Dench - Baylys Beach SLS - Saved
Membership Application · Information ▾

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related ▾

Pre-Processing Requested	No	Post-Processing Requested	No
Pre-Processing Complete	Yes	Post-Processing Completed	No
Status Reason	Pre-Processed		

Judy Dench - Baylys Beach SLS - Saved
Membership Application · Information ▾

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related ▾

Pre-Processing Requested	No	Post-Processing Requested	No
Pre-Processing Complete	Yes	Post-Processing Completed	No
Status Reason	Pre-Processed		

b. – change to Post Processed

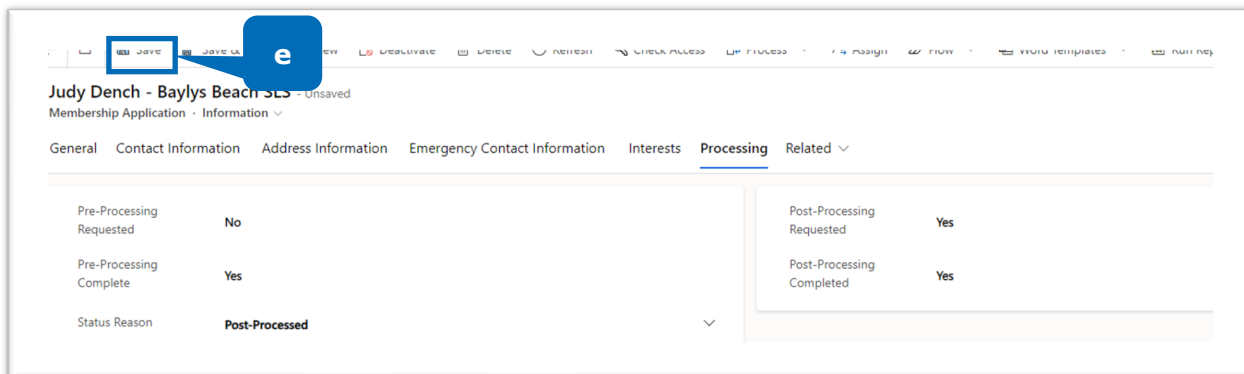
Judy Dench - Baylys Beach SLS - Saved
Membership Application · Information ▾

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related ▾

Pre-Processing Requested	No	Post-Processing Requested	No
Pre-Processing Complete	Yes	Post-Processing Completed	No
Status Reason	Pre-Processed		

c. – change to Yes

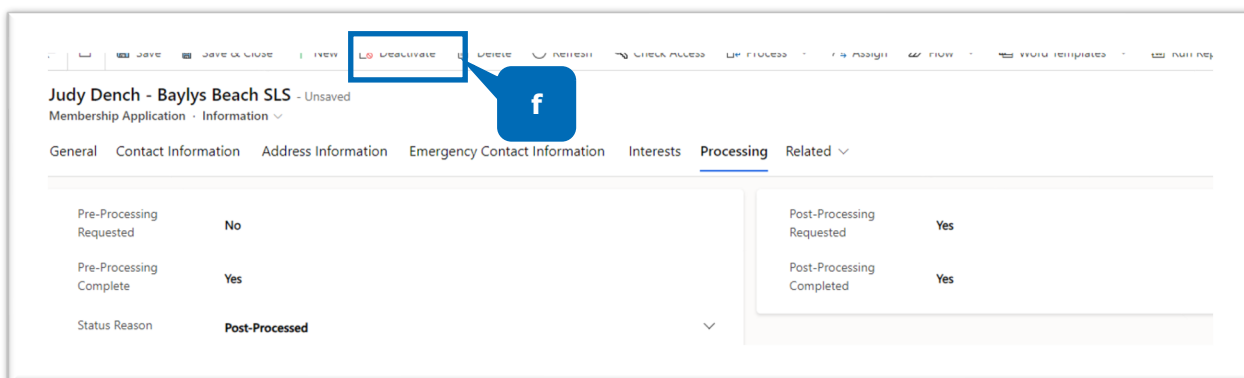
d. – change to Yes



Judy Dench - Baylys Beach SLS - Unsaved
Membership Application · Information

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related

Pre-Processing Requested	No	Post-Processing Requested	Yes
Pre-Processing Complete	Yes	Post-Processing Completed	Yes
Status Reason	Post-Processed		



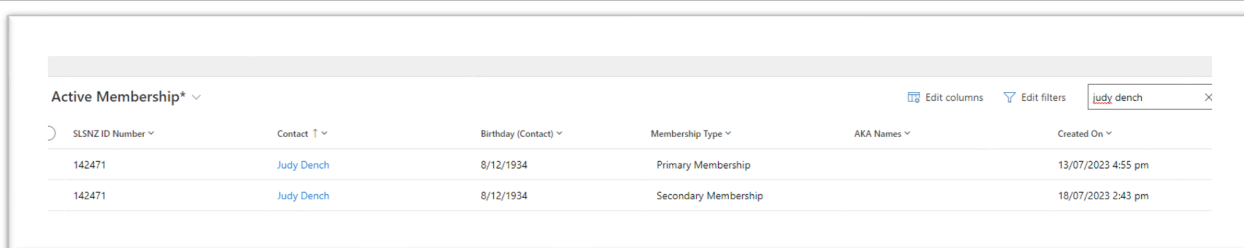
Judy Dench - Baylys Beach SLS - Unsaved
Membership Application · Information

General Contact Information Address Information Emergency Contact Information Interests **Processing** Related

Pre-Processing Requested	No	Post-Processing Requested	Yes
Pre-Processing Complete	Yes	Post-Processing Completed	Yes
Status Reason	Post-Processed		

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.



Active Membership*

SLSNZ ID Number	Contact	Birthday (Contact)	Membership Type	AKA Names	Created On
142471	Judy Dench	8/12/1934	Primary Membership		13/07/2023 4:55 pm
142471	Judy Dench	8/12/1934	Secondary Membership		18/07/2023 2:43 pm

TRANSFER A MEMBER IN THE CRM

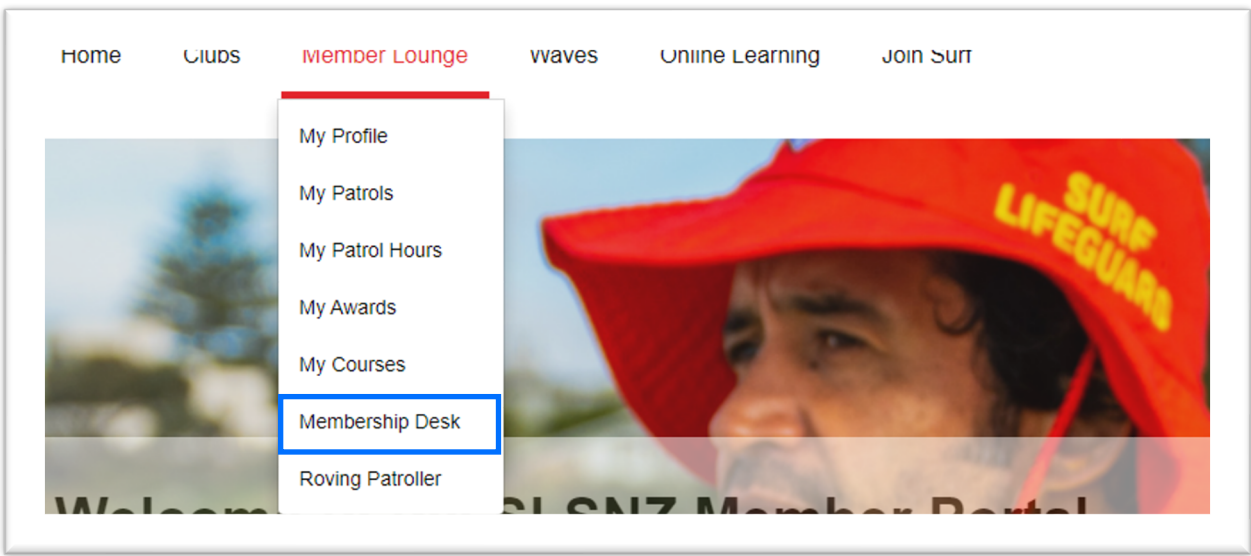
Security role required:	_SLS – Admin Level 1 (Club) OR _SLS – Base Role
Prerequisites	Member must exist Both the “Leaving” and the “Joining” club administrators must have the appropriate security role.

Points to note:

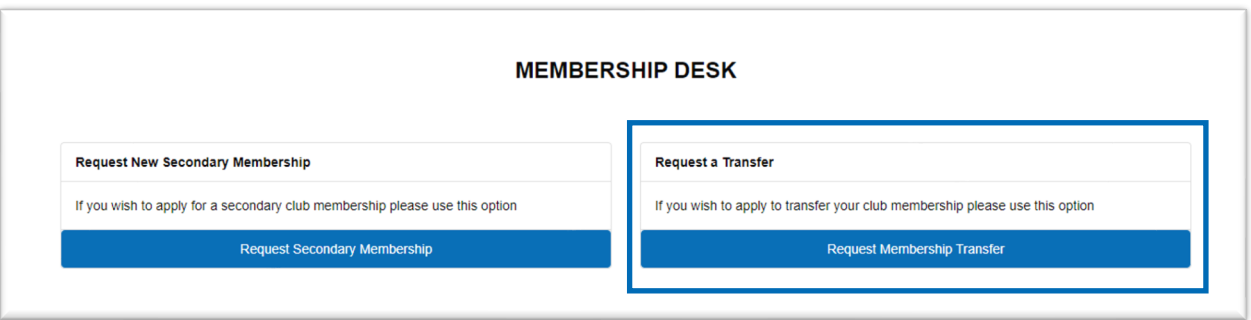
1. A Transfer is used when a member wants to change Primary club
2. Only one transfer per competition year is allowed. This is not controlled by the system.
3. Once a member is transferred, they become an active member of the new club, even if they were Inactive prior to the transfer.

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

2.	Applicant	Member Portal	Go to Member Lounge > Membership Desk
----	-----------	---------------	---------------------------------------



3.	Applicant	Member Portal	Select <i>Request Membership Transfer</i>
----	-----------	---------------	---





SURF LIFE SAVING®
NEW ZEALAND

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

REQUEST A TRANSFER

General

Destination Club *

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

Lookup records

Filter clubs displayed

Search

Choose one record and click Select to continue

<input checked="" type="checkbox"/>	Name ↑
<input type="checkbox"/>	Baylys Beach SLS
<input type="checkbox"/>	Bethells Beach SLSP
<input type="checkbox"/>	Brighton SLSC
<input type="checkbox"/>	Buller CRS
<input checked="" type="checkbox"/>	East End SLSC
<input type="checkbox"/>	Far North
<input type="checkbox"/>	Fitzroy SLSC

< 1 2 3 4 5 6 7 8 >

6.	Applicant	Member Portal	Click Submit
<div> <h3>REQUEST A TRANSFER</h3> <p>General</p> <p>Destination Club *</p> <div> <input type="text" value="East End SLSC"/> × Q </div> <div> <input type="button" value="Submit"/> </div> </div>			
7.	Workflow	CRM	Send email to <ul style="list-style-type: none"> - 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
<div> <p>Applications</p> <ul style="list-style-type: none"> Membership Appl... Transfers <p>Sundry</p> <ul style="list-style-type: none"> Award Recipients Non Patrol Hours Club Season Mem... Member Season P... <p>M Membership ⌵</p> </div>			

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

SLSNZ ID Number (Cont...	Contact ↑	Created On	Modified On	Destination Club	Original Club	Transfer Status	Transfer From Approved	Transfer To Approved
142471	Judy Dench	18/07/2023 3:20 pm	18/07/2023 3:20 pm	East End SLSC	Papamoa SLSC	New Transfer	Pending	

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

Judy Dench : From Papamoa SLSC to East End SLSC - Saved
Transfer - Information

Transfer - Business Process - Active for 1 minute

Original Club (1 Min) Destination Club Finalise

General **Transfer Details** Related

Name Judy Dench : From Papamoa SLSC to East End SLSC

Contact * [Judy Dench](#)

Owner * [Papamoa SLSC](#)

Transfer Note ---

Transfer Status New Transfer

Membership **Judy Dench - 142471**

Contact * [Judy Dench](#)

SLSNZ ID Number * 142471

Email Address info@papamoaifeguards.co.nz

Patrolling Member No

Subs Paid Date ---

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

Judy Dench : From Papamoa SLSC to East End SLSC - Saved
Transfer - Information

Transfer - Business Process - Active for 1 minute

Original Club (1 Min) Destination Club Finalise

General **Transfer Details** Related

Original Club * [Papamoa SLSC](#)

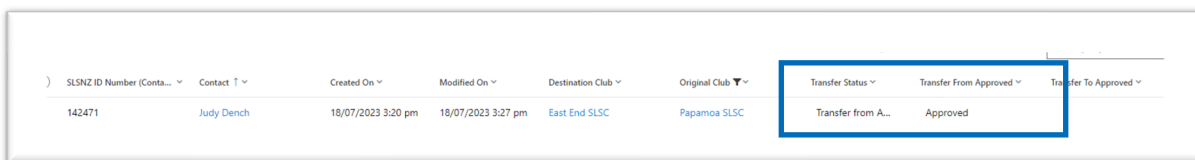
Destination Club * [East End SLSC](#)

Transfer From Approved Pending

Transfer To Approved ---

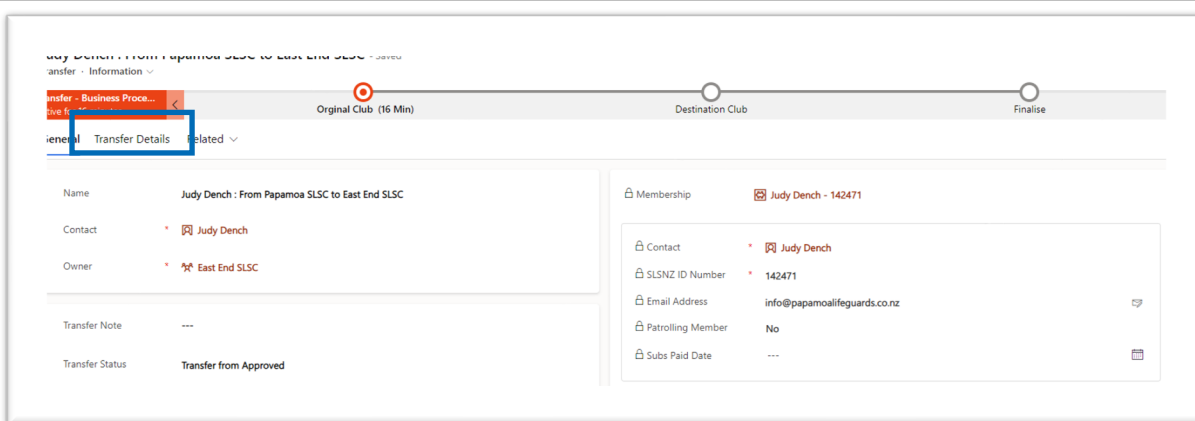
Original Club Approval Deadline On 1/08/2023 3:20 PM

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
-----	----------------------------	-----	---



SLSNZ ID Number (Cont...	Contact	Created On	Modified On	Destination Club	Original Club	Transfer Status	Transfer From Approved	Transfer To Approved
142471	Judy Dench	18/07/2023 3:20 pm	18/07/2023 3:27 pm	East End SLSC	Papamoa SLSC	Transfer from A...	Approved	

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



Judy Dench : From Papamoa SLSC to East End SLSC

Transfer - Information

Transfer - Business Process: [Progress Bar: Original Club (16 Min), Destination Club, Finalise]

General | **Transfer Details** | Related

Name: Judy Dench : From Papamoa SLSC to East End SLSC

Contact: * Judy Dench

Owner: * East End SLSC

Transfer Note: ---

Transfer Status: Transfer from Approved

Membership: Judy Dench - 142471

Contact: * Judy Dench

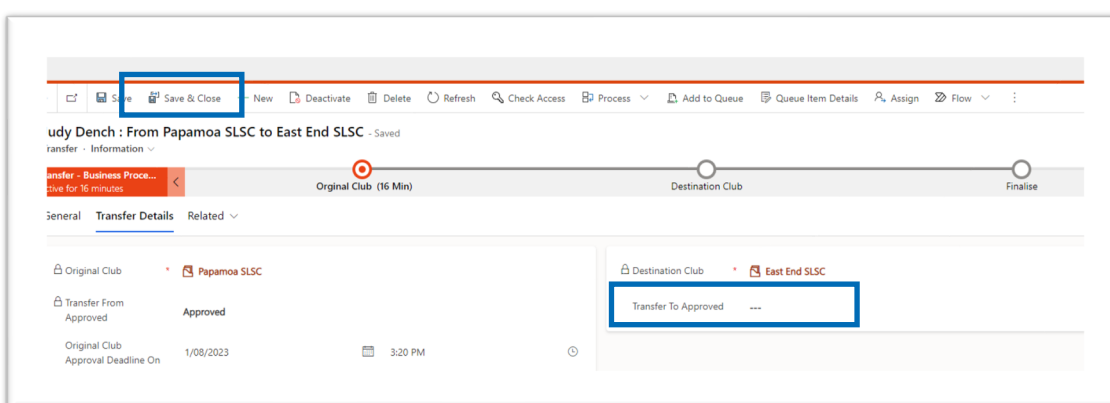
SLSNZ ID Number: * 142471

Email Address: info@papamoalifeguards.co.nz

Patrolling Member: No

Subs Paid Date: ---

14.	Club admin – receiving club	CRM	Review request, and when ready select <i>Approved</i> in the Transfer To Approval field. Then click Save & Close.
-----	-----------------------------	-----	---



Judy Dench : From Papamoa SLSC to East End SLSC - Saved

Transfer - Information

Transfer - Business Process: [Progress Bar: Original Club (16 Min), Destination Club, Finalise]

General | **Transfer Details** | Related

Original Club: * Papamoa SLSC

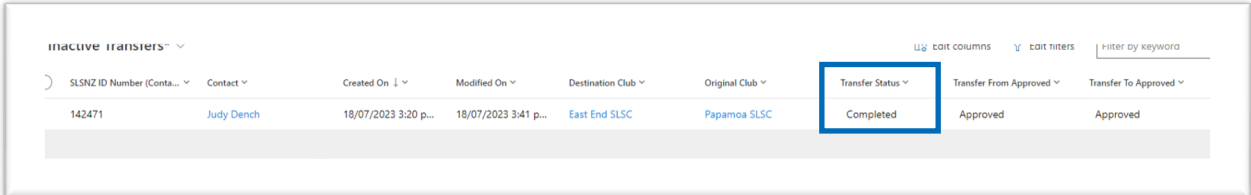
Transfer From: Approved

Original Club Approval Deadline On: 1/08/2023 3:20 PM

Destination Club: * East End SLSC

Transfer To Approved: ---

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.



SLSNZ ID Number (Contact)	Contact	Created On	Modified On	Destination Club	Original Club	Transfer Status	Transfer From Approved	Transfer To Approved
142471	Judy Dench	18/07/2023 3:20 p.m.	18/07/2023 3:41 p.m.	East End SLSC	Papamoa SLSC	Completed	Approved	Approved

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.

SLSNZ ID Number (Contact)	Contact	Created On	Modified On	Destination Club	Original Club	Transfer Status	Transfer From Approved	Transfer To Approved
70039	Marko Pihl Grulic	3/10/2022 10:39 a.m.	17/10/2022 11:00 a.m.	Onemana SLSC	Omanu SLSC	Transfer from Approved	Approved	
60660	Chantelle Gorecki	20/10/2022 4:22 p.m.	22/10/2022 9:33 p.m.	Waikī Beach LS	Piha SLSC	Transfer from Approved	Approved	
122935	Clara Reid	31/10/2022 2:03 p.m.	5/11/2022 10:29 a.m.	St Kilda SLSC	Warrington SLSC	Transfer from Approved	Approved	

Patrolling Module

Patrol Occurrences

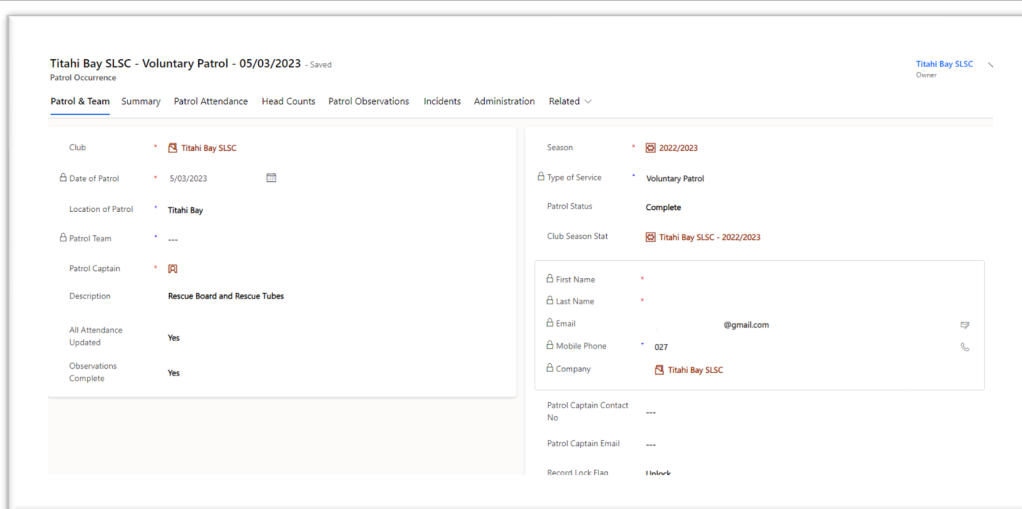
Security role required: _SLS – Admin Level 1 (Club) OR
_SLS – Base Role

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



Titahi Bay SLSC - Voluntary Patrol - 05/03/2023 - Saved

Patrol Occurrence

Titahi Bay SLSC Owner

Patrol & Team Summary Patrol Attendance Head Counts Patrol Observations Incidents Administration Related

Club * Titahi Bay SLSC

Date of Patrol * 5/03/2023

Location of Patrol * Titahi Bay

Patrol Team * ---

Patrol Captain * ---

Description Rescue Board and Rescue Tubes

All Attendance Updated Yes

Observations Complete Yes

Season * 2022/2023

Type of Service * Voluntary Patrol

Patrol Status Complete

Club Season Stat Titahi Bay SLSC - 2022/2023

First Name *

Last Name *

Email * @gmail.com

Mobile Phone * 027

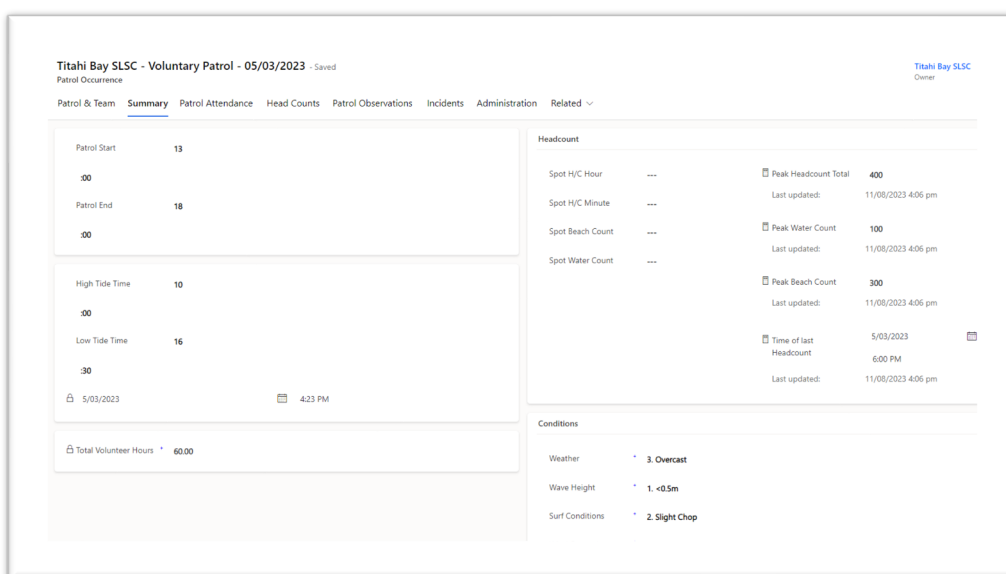
Company * Titahi Bay SLSC

Patrol Captain Contact No ---

Patrol Captain Email ---

Record Lock Plan i lock

2.	Admin	CRM	The Summary tab provides information about the surf and weather at the time of the patrol
----	-------	-----	---



Titahi Bay SLSC - Voluntary Patrol - 05/03/2023 - Saved

Patrol Occurrence

Titahi Bay SLSC Owner

Patrol & Team Summary **Summary** Patrol Attendance Head Counts Patrol Observations Incidents Administration Related

Patrol Start 13:00

Patrol End 18:00

High Tide Time 10:00

Low Tide Time 16:30

5/03/2023 4:23 PM

Total Volunteer Hours * 60.00

Headcount

Spot H/C Hour --- Peak Headcount Total 400 Last updated: 11/08/2023 4:06 pm

Spot H/C Minute --- Peak Water Count 100 Last updated: 11/08/2023 4:06 pm

Spot Beach Count --- Peak Beach Count 300 Last updated: 11/08/2023 4:06 pm

Spot Water Count --- Time of last Headcount 5/03/2023 6:00 PM Last updated: 11/08/2023 4:06 pm

Conditions

Weather * 3. Overcast

Wave Height * 1. <0.5m

Surf Conditions * 2. Slight Chop

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.
----	-------	-----	--

Patrol Occurrence

Patrol & Team Summary **Patrol Attendance** Head Counts Patrol Observations Incidents Administration Related

+ New Patrol Attendance Refresh Run Report

Contact	SLSNZ ID Number	Club	Patrol Role	Attendance	Attended start	Attended finish	Total hours
	123523	Titahi Bay SLSC	Life Guard	Attended	5/03/2023 1:00 pm	5/03/2023 6:00 pm	5.00
	85609	Titahi Bay SLSC	IRB Driver	Attended	5/03/2023 1:00 pm	5/03/2023 6:00 pm	5.00
	110999	Titahi Bay SLSC	Patrol Support	Attended	5/03/2023 1:00 pm	5/03/2023 6:00 pm	5.00
	69233	Titahi Bay SLSC	Patrol Captain	Attended	5/03/2023 1:00 pm	5/03/2023 6:00 pm	5.00

1 - 4 of 15 Page 1

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.
----	-------	-----	---

Titahi Bay SLSC - Voluntary Patrol - 05/03/2023 - Saved

Patrol Occurrence

Patrol & Team Summary Patrol Attendance **Head Counts** Patrol Observations Incidents Administration Related

+ New Head Count Refresh Run Report

Time of Count	Beach Count	Water Count	Total Count
5/03/2023 1:00 pm	19	3	22
5/03/2023 2:00 pm	60	5	65
5/03/2023 3:00 pm	300	100	400
5/03/2023 4:00 pm	250	86	336

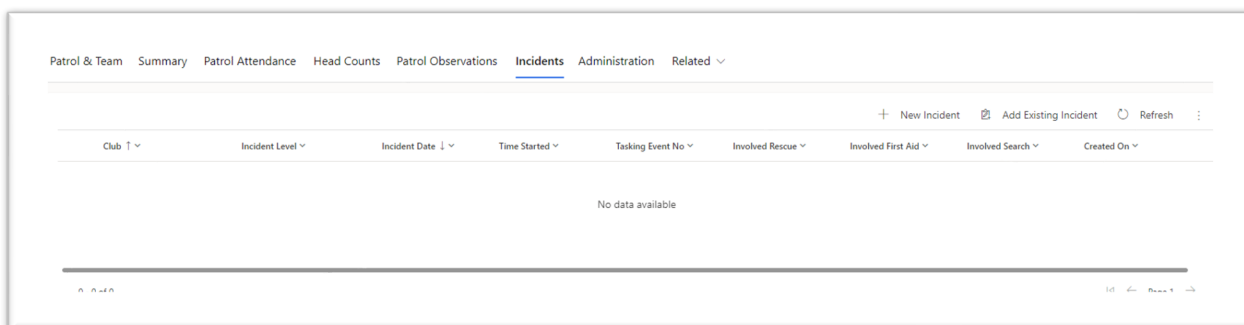
1 - 4 of 4 Page 1

5.	Admin	CRM	The Patrol Observations tab tells you the equipment available and the actions taken (assists, preventions etc).
----	-------	-----	---

Patrol & Team Summary Patrol Attendance Head Counts **Patrol Observations** Incidents Administration Related

Resources	Actions
No. Volunteers + 12	No. People Rescued + 0
No. Patrol Areas + 1	No. People Assisted to safety + 0
No. IRBs/RWC + 1	No. People needing Major First Aid + 0
No. Radios Used + 4	No. Minor First Aid incidents + 0
No. ATVs + 0	No. Searches + 0
Other Equipment ---	No. Preventative Actions + 0
	No. Public in Preventatives + 0

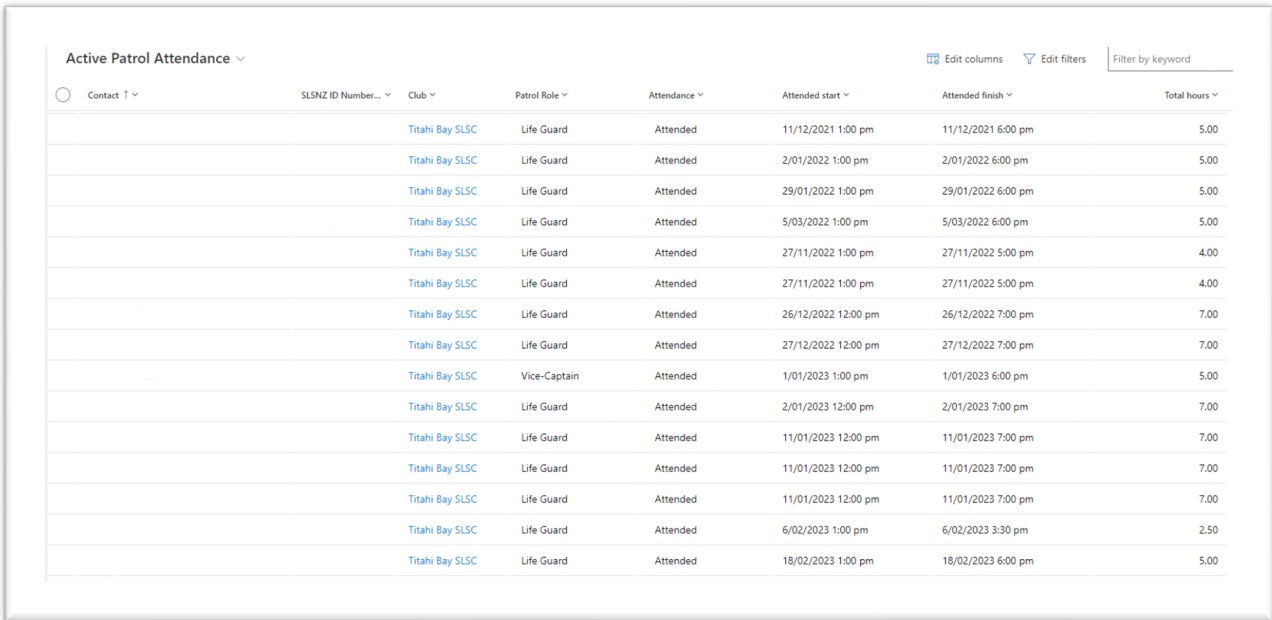
6.	Admin	CRM	The Incidents tab shows you if there was an incident linked to the patrol. In this instance there weren't any. (You can link an existing incident on this screen.)
----	-------	-----	--



PATROL ATTENDANCE

The Patrol Attendance item allows you to see Patrol Occurrences attributed to an individual

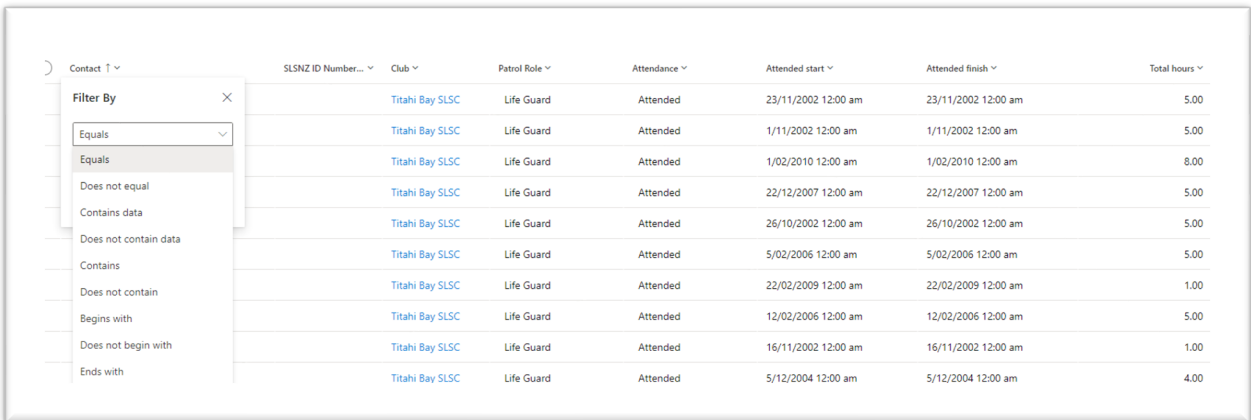
Step	Person	System	Step
1.	Admin	CRM	In the Patrolling module, go to Patrol Attendance. In this example, a single person has completed each of these patrols (name and ID blocked for privacy reasons).



Contact	SLSNZ ID Number	Club	Patrol Role	Attendance	Attended start	Attended finish	Total hours
		Titahi Bay SLSC	Life Guard	Attended	11/12/2021 1:00 pm	11/12/2021 6:00 pm	5.00
		Titahi Bay SLSC	Life Guard	Attended	2/01/2022 1:00 pm	2/01/2022 6:00 pm	5.00
		Titahi Bay SLSC	Life Guard	Attended	29/01/2022 1:00 pm	29/01/2022 6:00 pm	5.00
		Titahi Bay SLSC	Life Guard	Attended	5/03/2022 1:00 pm	5/03/2022 6:00 pm	5.00
		Titahi Bay SLSC	Life Guard	Attended	27/11/2022 1:00 pm	27/11/2022 5:00 pm	4.00
		Titahi Bay SLSC	Life Guard	Attended	27/11/2022 1:00 pm	27/11/2022 5:00 pm	4.00
		Titahi Bay SLSC	Life Guard	Attended	26/12/2022 12:00 pm	26/12/2022 7:00 pm	7.00
		Titahi Bay SLSC	Life Guard	Attended	27/12/2022 12:00 pm	27/12/2022 7:00 pm	7.00
		Titahi Bay SLSC	Vice-Captain	Attended	1/01/2023 1:00 pm	1/01/2023 6:00 pm	5.00
		Titahi Bay SLSC	Life Guard	Attended	2/01/2023 12:00 pm	2/01/2023 7:00 pm	7.00
		Titahi Bay SLSC	Life Guard	Attended	11/01/2023 12:00 pm	11/01/2023 7:00 pm	7.00
		Titahi Bay SLSC	Life Guard	Attended	11/01/2023 12:00 pm	11/01/2023 7:00 pm	7.00
		Titahi Bay SLSC	Life Guard	Attended	11/01/2023 12:00 pm	11/01/2023 7:00 pm	7.00
		Titahi Bay SLSC	Life Guard	Attended	6/02/2023 1:00 pm	6/02/2023 3:30 pm	2.50
		Titahi Bay SLSC	Life Guard	Attended	18/02/2023 1:00 pm	18/02/2023 6:00 pm	5.00

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

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.
----	-------	-----	--

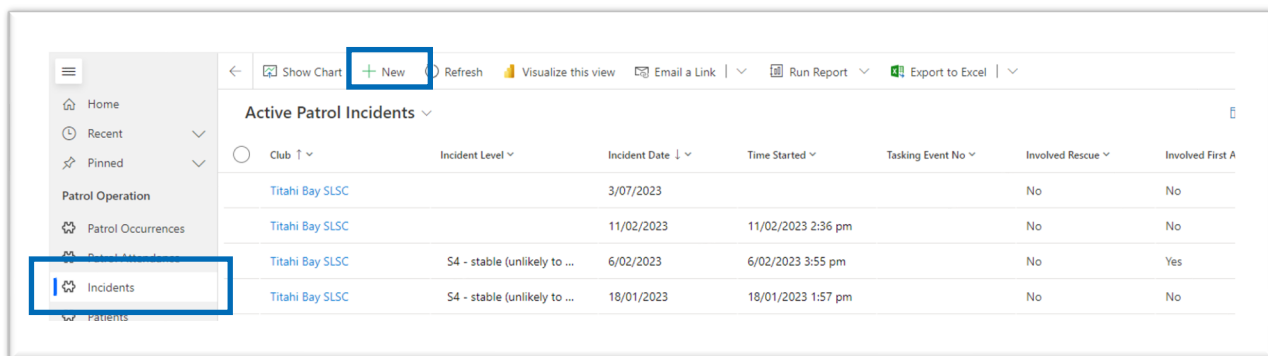


Contact	SLSNZ ID Number	Club	Patrol Role	Attendance	Attended start	Attended finish	Total hours
		Titahi Bay SLSC	Life Guard	Attended	23/11/2002 12:00 am	23/11/2002 12:00 am	5.00
		Titahi Bay SLSC	Life Guard	Attended	1/11/2002 12:00 am	1/11/2002 12:00 am	5.00
		Titahi Bay SLSC	Life Guard	Attended	1/02/2010 12:00 am	1/02/2010 12:00 am	8.00
		Titahi Bay SLSC	Life Guard	Attended	22/12/2007 12:00 am	22/12/2007 12:00 am	5.00
		Titahi Bay SLSC	Life Guard	Attended	26/10/2002 12:00 am	26/10/2002 12:00 am	5.00
		Titahi Bay SLSC	Life Guard	Attended	5/02/2006 12:00 am	5/02/2006 12:00 am	5.00
		Titahi Bay SLSC	Life Guard	Attended	22/02/2009 12:00 am	22/02/2009 12:00 am	1.00
		Titahi Bay SLSC	Life Guard	Attended	12/02/2006 12:00 am	12/02/2006 12:00 am	5.00
		Titahi Bay SLSC	Life Guard	Attended	16/11/2002 12:00 am	16/11/2002 12:00 am	1.00
		Titahi Bay SLSC	Life Guard	Attended	5/12/2004 12:00 am	5/12/2004 12:00 am	4.00

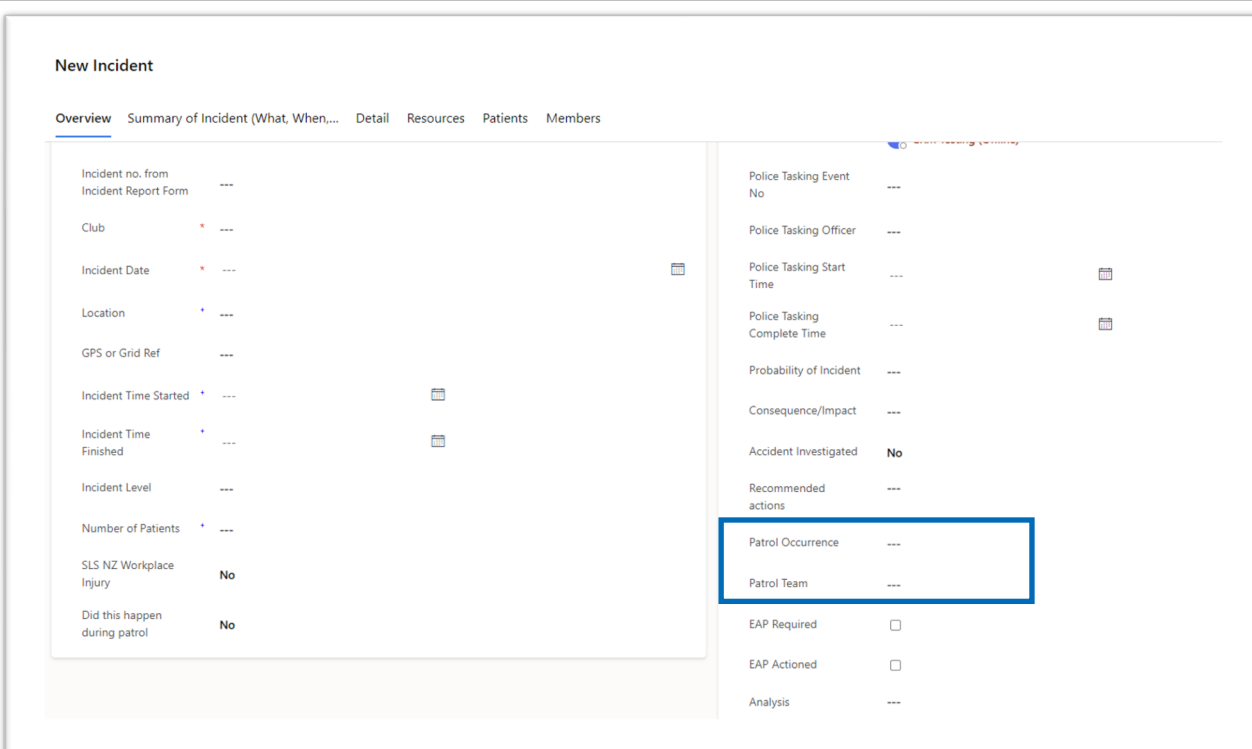
CREATE AN INCIDENT

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



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	<input type="checkbox"/>
Patient Assist	<input checked="" type="checkbox"/>
First Aid	<input type="checkbox"/>
Search	<input type="checkbox"/>
Near Miss	<input type="checkbox"/>

Activities Involved

Swimming	<input type="checkbox"/>	Fishing	<input type="checkbox"/>
Surfing/bodyboarding	<input type="checkbox"/>	Attempt To Rescue Others	<input type="checkbox"/>
Sail or Boat	<input type="checkbox"/>	SLS Competition / Training	<input type="checkbox"/>
Walking/Running	<input checked="" type="checkbox"/>	Other	---

Incident Conditions

5.	Admin	CRM	On the Resources tab, check the boxes as appropriate																				
<p>Overview Summary of Incident (What, When,... Detail <u>Resources</u> Patients Members</p>																							
<table border="1"> <tr> <td>IRB</td> <td><input type="checkbox"/></td> <td>Radios</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Rescue Tube</td> <td><input type="checkbox"/></td> <td>RWC</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Rescue Board</td> <td><input type="checkbox"/></td> <td>No Equipment</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Rescue Vehicle / ATV</td> <td><input type="checkbox"/></td> <td>First Aid Supplies</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Other</td> <td>---</td> <td>Methoxyflurane</td> <td><input type="checkbox"/></td> </tr> </table>				IRB	<input type="checkbox"/>	Radios	<input type="checkbox"/>	Rescue Tube	<input type="checkbox"/>	RWC	<input type="checkbox"/>	Rescue Board	<input type="checkbox"/>	No Equipment	<input type="checkbox"/>	Rescue Vehicle / ATV	<input type="checkbox"/>	First Aid Supplies	<input checked="" type="checkbox"/>	Other	---	Methoxyflurane	<input type="checkbox"/>
IRB	<input type="checkbox"/>	Radios	<input type="checkbox"/>																				
Rescue Tube	<input type="checkbox"/>	RWC	<input type="checkbox"/>																				
Rescue Board	<input type="checkbox"/>	No Equipment	<input type="checkbox"/>																				
Rescue Vehicle / ATV	<input type="checkbox"/>	First Aid Supplies	<input checked="" type="checkbox"/>																				
Other	---	Methoxyflurane	<input type="checkbox"/>																				

6.	Admin	CRM	Click Save				
<p>← ↻ Save Save & Close + New</p> <p>New Incident - Unsaved</p> <p>Overview Summary of Incident (What, When,... Detail <u>Resources</u> Patients Members</p> <table border="1"> <tr> <td>IRB</td> <td><input type="checkbox"/></td> <td>Radios</td> <td><input type="checkbox"/></td> </tr> </table>				IRB	<input type="checkbox"/>	Radios	<input type="checkbox"/>
IRB	<input type="checkbox"/>	Radios	<input type="checkbox"/>				





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.																
<p>Overview Summary of Incident (What, When,... Detail Resources <u>Patients</u> Members Related</p> <p>+ New Patient Refresh Run Report</p> <table border="1"> <thead> <tr> <th>Incident ↑</th> <th>Incident Date (Incident) ↓</th> <th>Club (Incident) ↓</th> <th>First Name ↓</th> <th>Last Name ↓</th> <th>Age Range ↓</th> <th>Ethnic Origin ↓</th> <th>Gender ↓</th> </tr> </thead> <tbody> <tr> <td colspan="8">No data available</td> </tr> </tbody> </table> <p>0 - 0 of 0 Page 1</p>				Incident ↑	Incident Date (Incident) ↓	Club (Incident) ↓	First Name ↓	Last Name ↓	Age Range ↓	Ethnic Origin ↓	Gender ↓	No data available							
Incident ↑	Incident Date (Incident) ↓	Club (Incident) ↓	First Name ↓	Last Name ↓	Age Range ↓	Ethnic Origin ↓	Gender ↓												
No data available																			

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.
----	-------	-----	--

New Patient - Unsaved

Patient Reasons Outcomes Equipment & Treatment Vitals

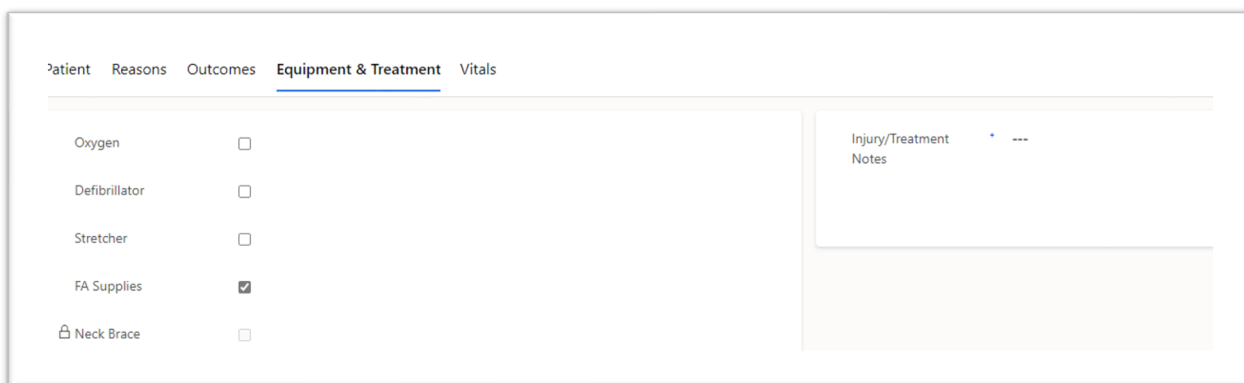
Name	---	SLSNZ Member	* No
Incident	*  Titahi Bay SLSC : 55,260 : [10/08/2023]	Contact	---
Incident Level	S4 - stable (unlikely to change)	Gender	* Male / Tane
Incident Date	10/08/2023 	Age Range	+ 41 - 60
First Name	+ Johnny	Ethnic Origin	+ ---
Last Name	+ Knoxville	Ethnic Origin Other	---
Date of Birth	+ 11/03/1971 	Was a Fatality Prevented	No
Address & Suburb	+ ---		
City	+ ---		
Mobile #	+ ---		
Owner	*  CRM Testing (Offline)		

9.	Admin	CRM	On the Reasons tab, select all that are applicable
----	-------	-----	--

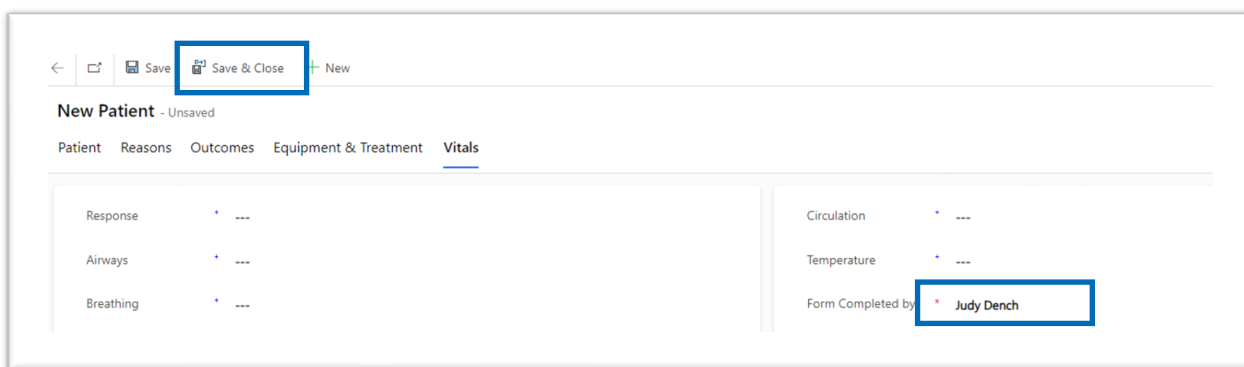
Patient **Reasons** Outcomes Equipment & Treatment Vitals

Exhaustion	<input type="checkbox"/>	Bruising	<input type="checkbox"/>
Poor swimming	<input type="checkbox"/>	Burns/Sunburn	<input type="checkbox"/>
Drugs/Alcohol	<input type="checkbox"/>	Breathing Difficulty	<input type="checkbox"/>
Excessive clothing	<input type="checkbox"/>	Feeling Unwell	<input type="checkbox"/>
Inappropriate equipment	<input checked="" type="checkbox"/>	Other	---
Jellyfish/Insect sting	<input type="checkbox"/>		
Cramp	<input checked="" type="checkbox"/>		
Cut/Abrasions	<input checked="" type="checkbox"/>		

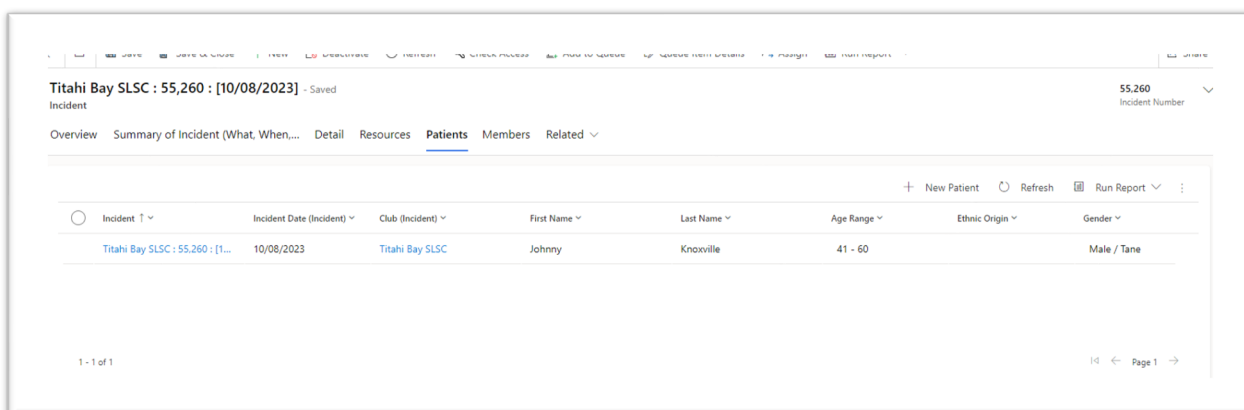
10.	Admin	CRM	On the Equipment & Treatment tab, select all that are applicable
-----	-------	-----	--



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 Planning

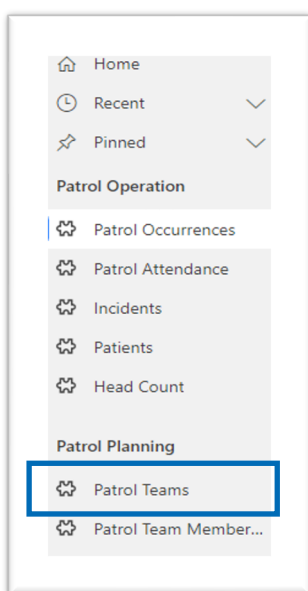
PATROL TEAMS

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

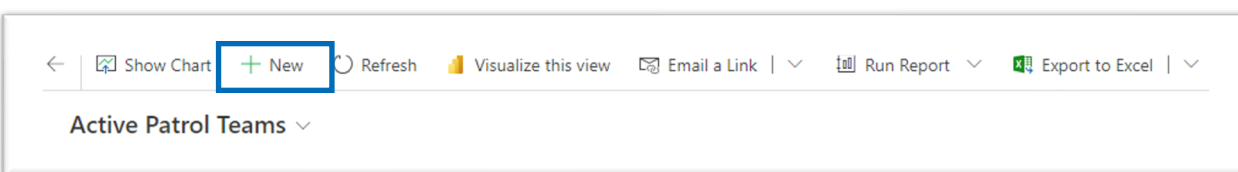
Points to note:

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".

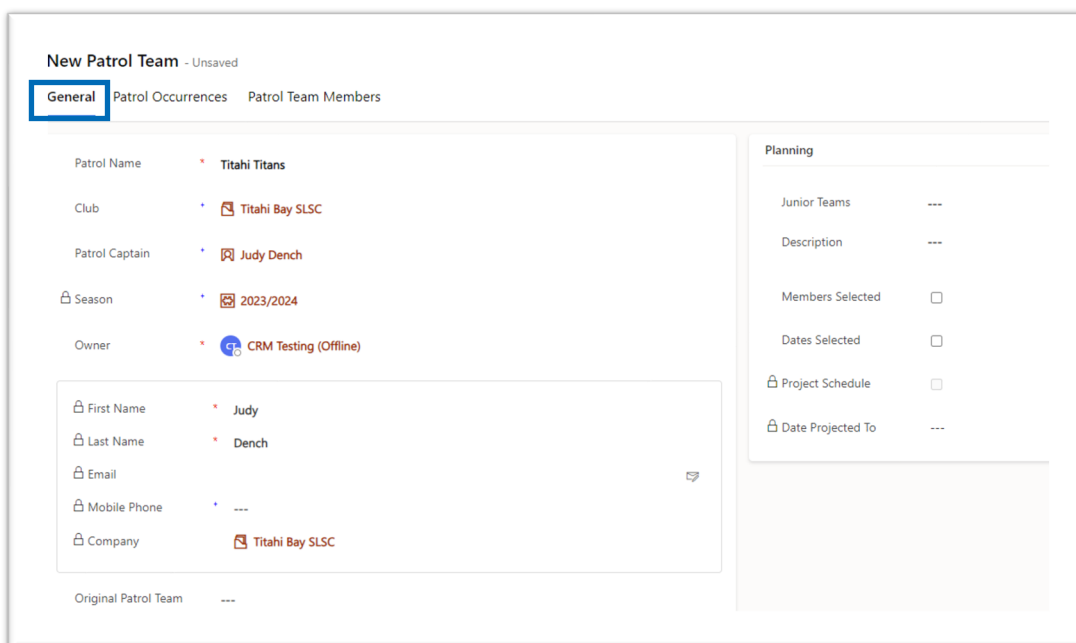
Step	Person	System	Step
1.	Admin	CRM	In the Patrolling module, go to Patrol Teams under the Patrol Planning heading



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
----	-------	-----	--



New Patrol Team - Unsaved

General | Patrol Occurrences | Patrol Team Members

Patrol Name * **Titahi Titans**

Club + **Titahi Bay SLSC**

Patrol Captain + **Judy Dench**

Season + **2023/2024**

Owner * **CRM Testing (Offline)**

First Name * **Judy**

Last Name * **Dench**

Email

Mobile Phone + ---

Company **Titahi Bay SLSC**

Original Patrol Team ---

Planning

Junior Teams ---

Description ---

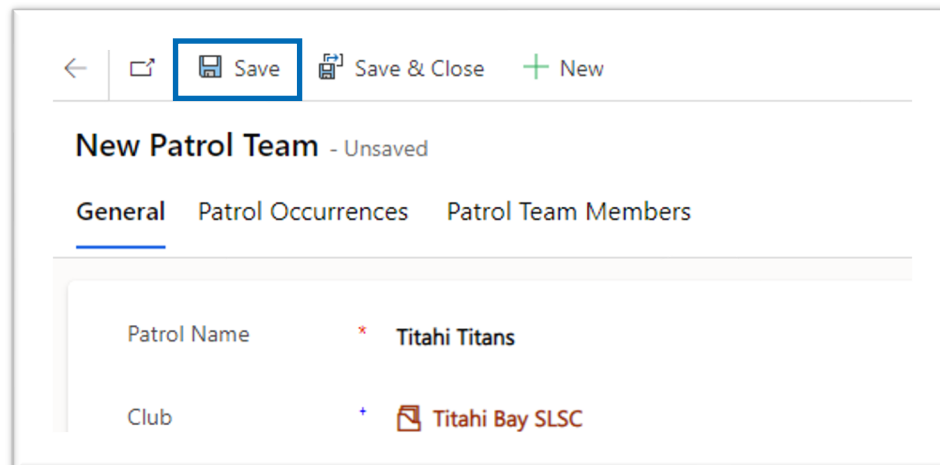
Members Selected ☐

Dates Selected ☐

Project Schedule ☐

Date Projected To ---

4.	Admin	CRM	Click Save
----	-------	-----	------------



← ↻ **Save** 🖨️ Save & Close + New

New Patrol Team - Unsaved

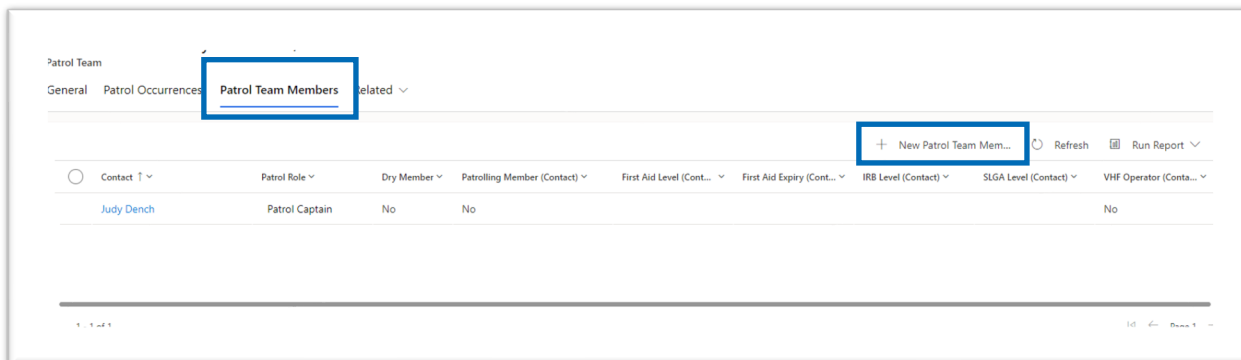
General | Patrol Occurrences | Patrol Team Members

Patrol Name * **Titahi Titans**

Club + **Titahi Bay SLSC**

Add Team Members

5.	Admin	CRM	Click on the Patrol Team Members tab. The captain will already be listed. Click +New Patrol Team Member
----	-------	-----	--



Patrol Team

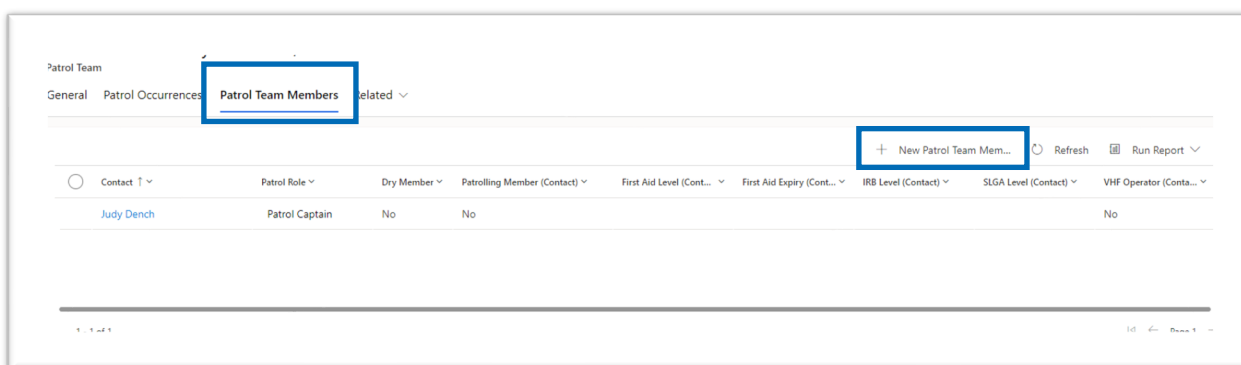
General Patrol Occurrences **Patrol Team Members** related

+ New Patrol Team Mem... Refresh Run Report

Contact	Patrol Role	Dry Member	Patrolling Member (Contact)	First Aid Level (Cont...	First Aid Expiry (Cont...	IRB Level (Contact)	SLGA Level (Contact)	VHF Operator (Conta...
Judy Dench	Patrol Captain	No	No					No

1 - 1 of 1

6.	Admin	CRM	In the Member field, select a member of your club that you would like to add to the team.
----	-------	-----	---



Patrol Team

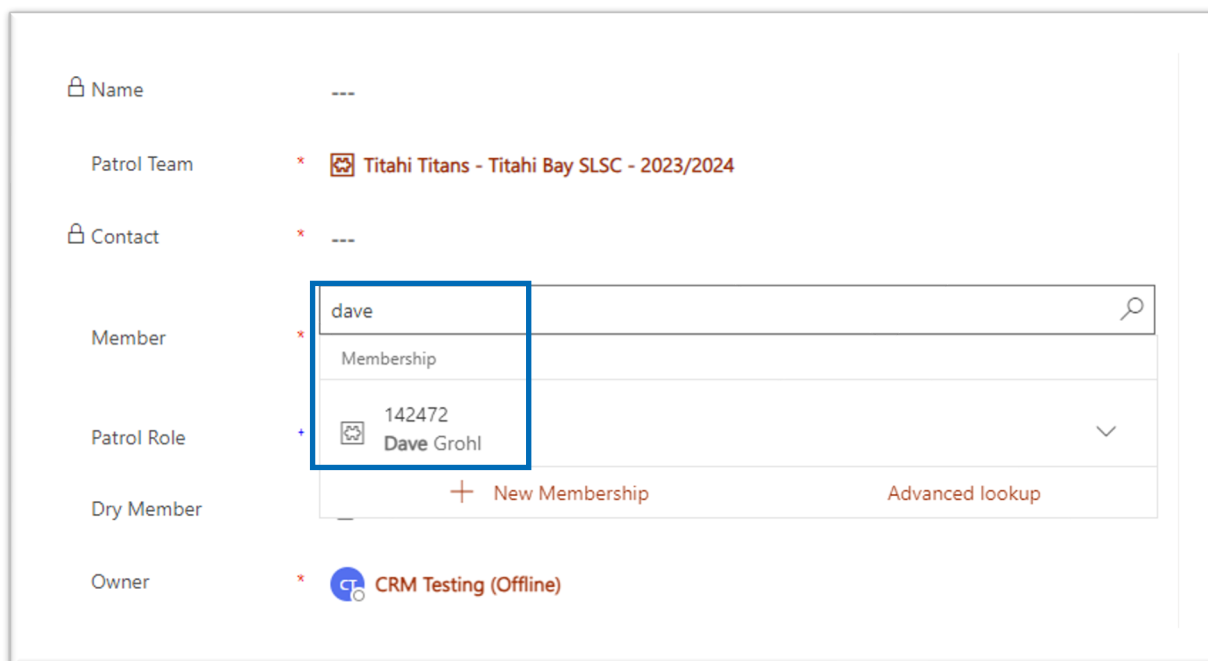
General Patrol Occurrences **Patrol Team Members** related

+ New Patrol Team Mem... Refresh Run Report

Contact	Patrol Role	Dry Member	Patrolling Member (Contact)	First Aid Level (Cont...	First Aid Expiry (Cont...	IRB Level (Contact)	SLGA Level (Contact)	VHF Operator (Conta...
Judy Dench	Patrol Captain	No	No					No

1 - 1 of 1

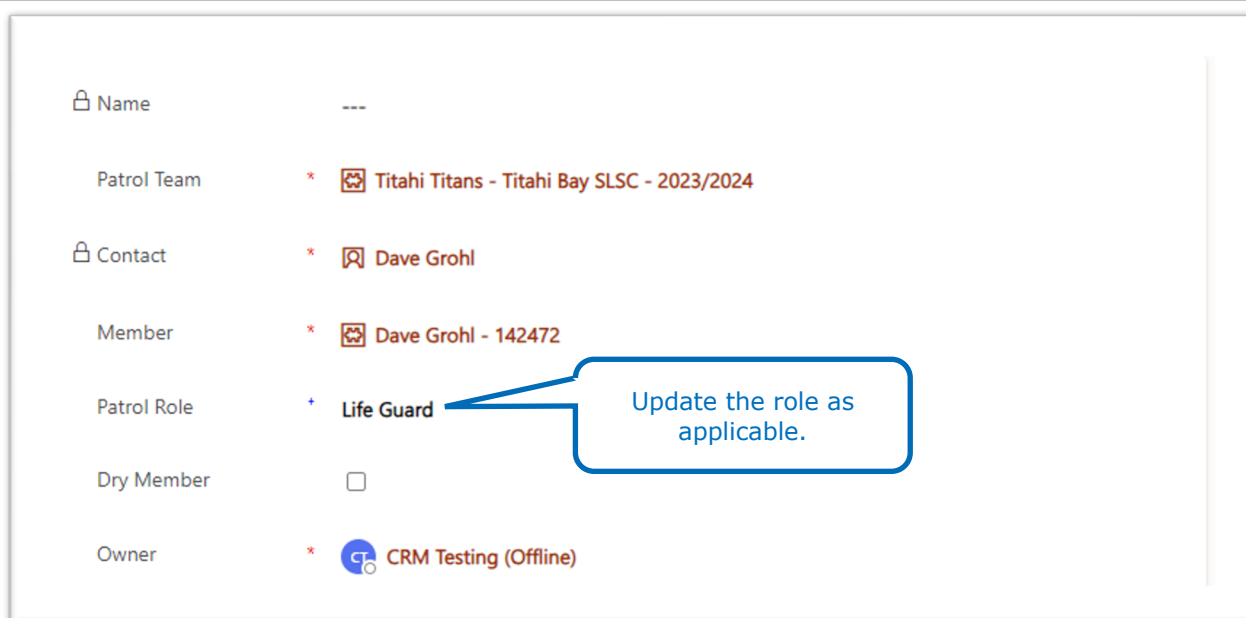
7.	Admin	CRM	Each team member must be added individually. Locate the Member you want to add. By selecting them, the rest of the page will populate. This search function only looks for Active memberships.
----	-------	-----	---



The screenshot shows a form with the following fields and values:

- Name: ---
- Patrol Team: * Titahi Titans - Titahi Bay SLSC - 2023/2024
- Contact: * ---
- Member: * (Search icon)
- Membership: 142472
- Patrol Role: + Dave Grohl (Dropdown arrow)
- Dry Member: ☐
- Owner: * CRM Testing (Offline)

Buttons at the bottom: + New Membership, Advanced lookup








The screenshot shows the form after selection. The 'Patrol Role' field now displays 'Life Guard'. A blue callout box points to this field with the text: 'Update the role as applicable.'

The form fields and values are:

- Name: ---
- Patrol Team: * Titahi Titans - Titahi Bay SLSC - 2023/2024
- Contact: * Dave Grohl
- Member: * Dave Grohl - 142472
- Patrol Role: + Life Guard
- Dry Member: ☐
- Owner: * CRM Testing (Offline)

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



 Save
  Save & Close
  New

Add Patrol Occurrences

9.	Admin	CRM	Click on the Patrol Occurrences tab
----	-------	-----	-------------------------------------

Titahi Titans - Titahi Bay SLSC - 2023/2024 - Saved

Patrol Team

General **Patrol Occurrences** Patrol Team Members Related ▾

10.	Admin	CRM	Click on the Patrol Occurrences tab
-----	-------	-----	-------------------------------------

Titahi Titans - Titahi Bay SLSC - 2023/2024 - Saved

Patrol Team

General **Patrol Occurrences** Patrol Team Members Related ▾


11.	Admin	CRM	Click +New Patrol Occurrence
-----	-------	-----	------------------------------


General **Patrol Occurrences** Patrol Team Members Related ▾

 New Patrol Occurrence  Add Existing Patrol Oc...


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


Patrol & Team Summary Patrol Attendance Head Counts Patrol Observations Incidents Administration

Club *  Titahi Bay SLSC

Date of Patrol * --- 

Location of Patrol * ---


Patrol Team *  Titahi Titans - Titahi Bay SLSC - 2023/2024

Patrol Captain *  Judy Dench

Description ---

All Attendance Updated No

Observations Complete No

Season *  2023/2024

Type of Service * ---

Patrol Status Draft


Club Season Stat ---

First Name * Judy

Last Name * Dench

Email

Mobile Phone * ---

Company  Titahi Bay SLSC

Patrol Captain Contact No ---

Patrol Captain Email ---

Record Lock Flag Unlock

13.	Admin	CRM	On the Summary tab, complete the start and finish times of the patrol. Then click Save.
-----	-------	-----	---

Patrol & Team Summary Patrol Attendance Head Counts Patrol Observations Incidents Administration

Patrol Start 12

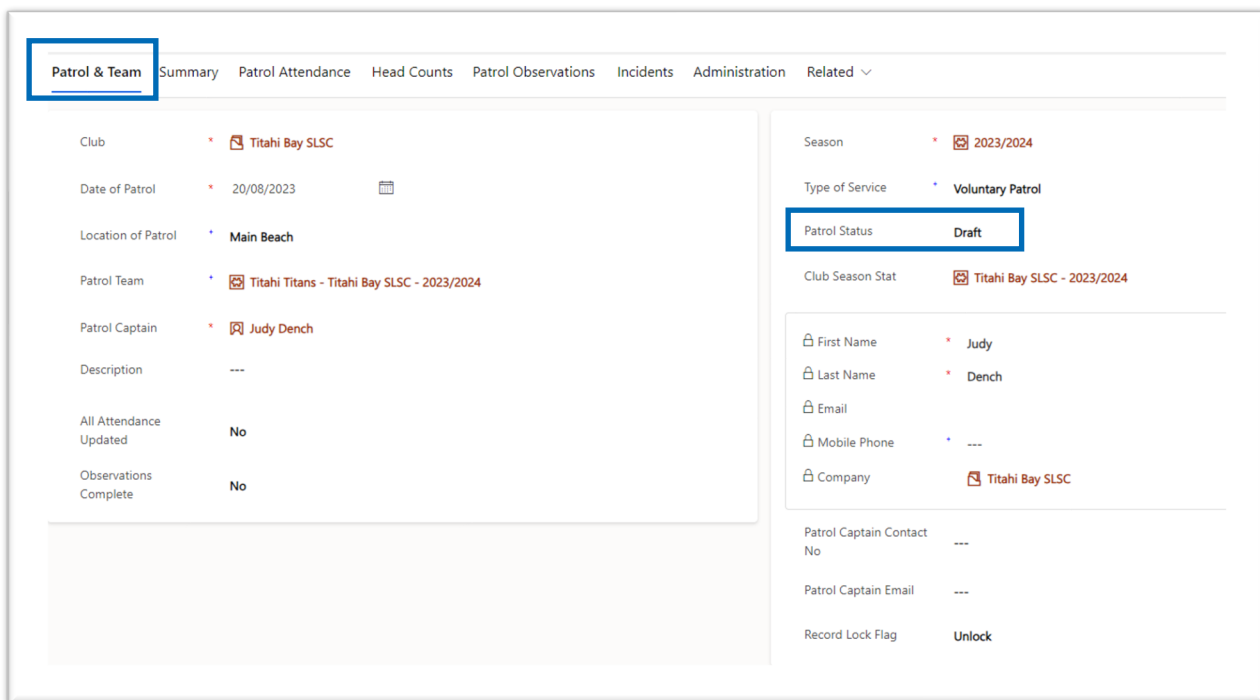
:00

Patrol End 16


:00


High Tide Time ---

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
-----	-------	-----	---





Patrol & Team Summary Patrol Attendance Head Counts Patrol Observations Incidents Administration Related ▾

Club *  Titahi Bay SLSC

Date of Patrol * 20/08/2023 

Location of Patrol * Main Beach


Patrol Team *  Titahi Titans - Titahi Bay SLSC - 2023/2024

Patrol Captain *  Judy Dench

Description ---


All Attendance Updated No

Observations Complete No

Season *  2023/2024

Type of Service * Voluntary Patrol

Patrol Status Draft


Club Season Stat  Titahi Bay SLSC - 2023/2024

First Name * Judy

Last Name * Dench

Email

Mobile Phone * ---

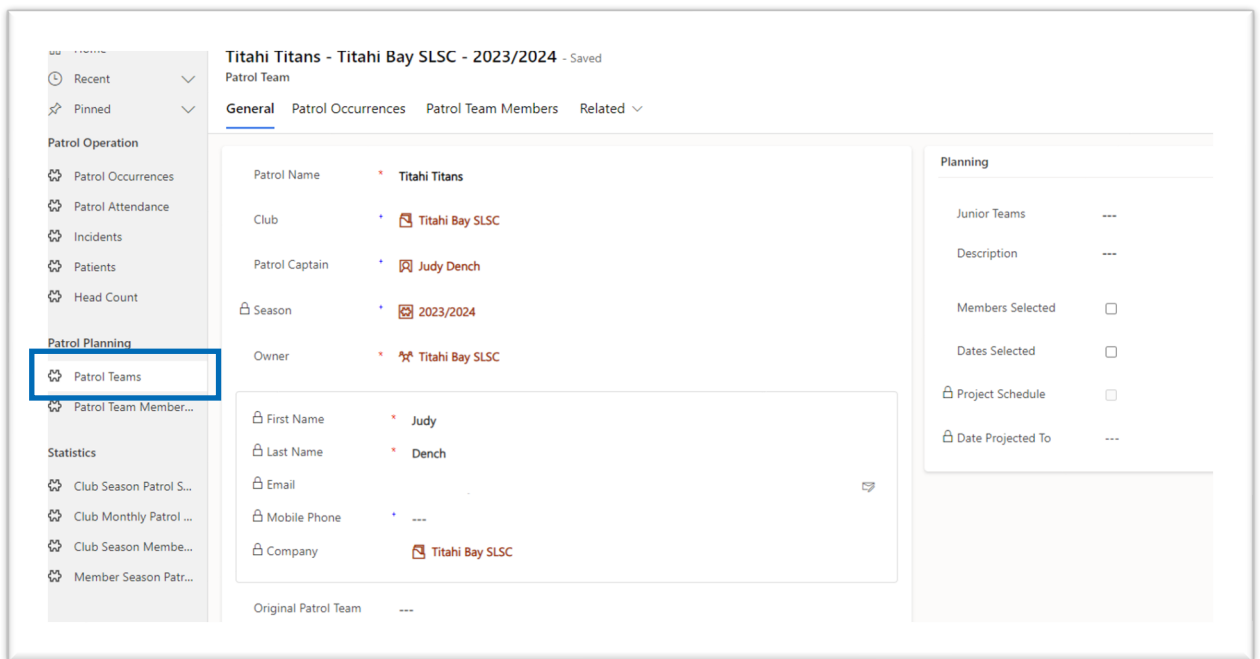
Company  Titahi Bay SLSC

Patrol Captain Contact No ---

Patrol Captain Email ---

Record Lock Flag Unlock


15.	Admin	CRM	Now go back to Patrol Teams, locate and open your team
-----	-------	-----	--





Titahi Titans - Titahi Bay SLSC - 2023/2024 - Saved
Patrol Team


General Patrol Occurrences Patrol Team Members Related ▾

Patrol Name * Titahi Titans

Club *  Titahi Bay SLSC

Patrol Captain *  Judy Dench

Season *  2023/2024


Owner *  Titahi Bay SLSC

First Name * Judy

Last Name * Dench

Email

Mobile Phone * ---

Company  Titahi Bay SLSC

Original Patrol Team ---

Planning

Junior Teams ---

Description ---

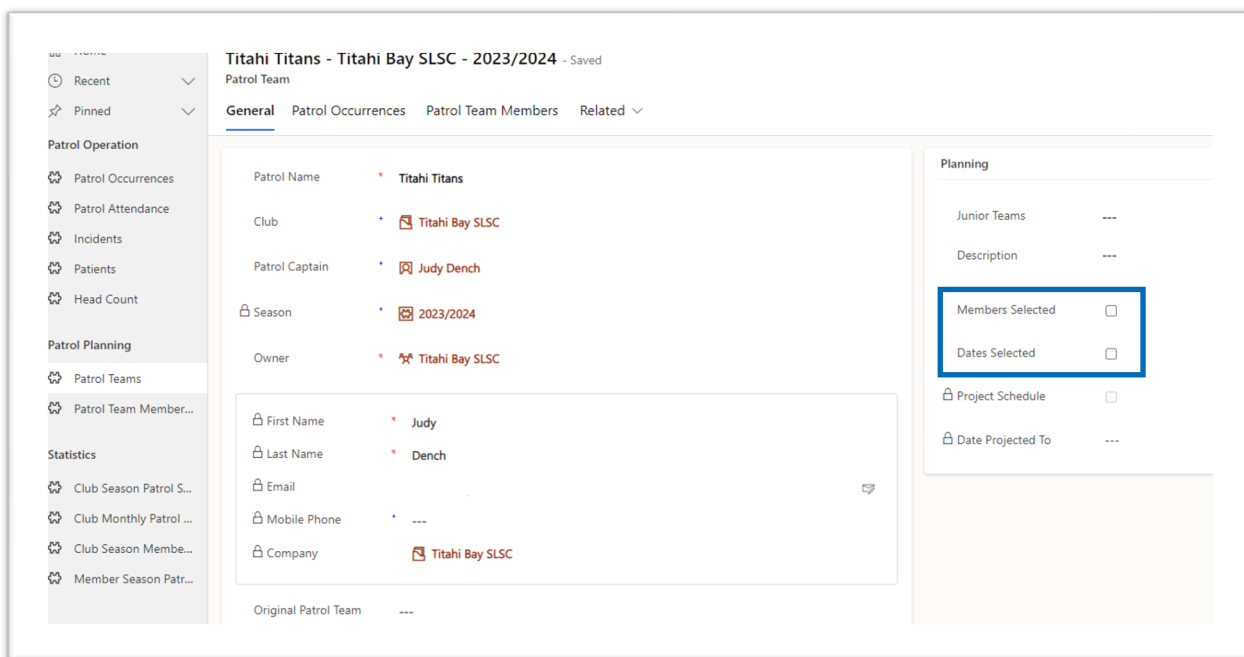
Members Selected ☐

Dates Selected ☐

Project Schedule ☐

Date Projected To ---

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:

PATROLS

Are you logging in to enter your Patrol Captain's Report Form? Great, you're in the right place!

If your club has pre-entered your patrols for the season just scroll down this list until you find the date you need.

If not, click the 'Create' button and enter your details for the patrol.

Need help? Refer to our [Patrols User Guide](#).

Patrol Occurrences (current season) ▾

Patrol Date ▾	Name	Service	Location ↑	Patrol Captain	Patrol Status	Total Volunteer Hrs
20-06-2023	Titahi Bay SLSC - Voluntary Patrol - 20/06/2023	Voluntary Patrol	Main Beach	Judy Dench	Planned	

National Module

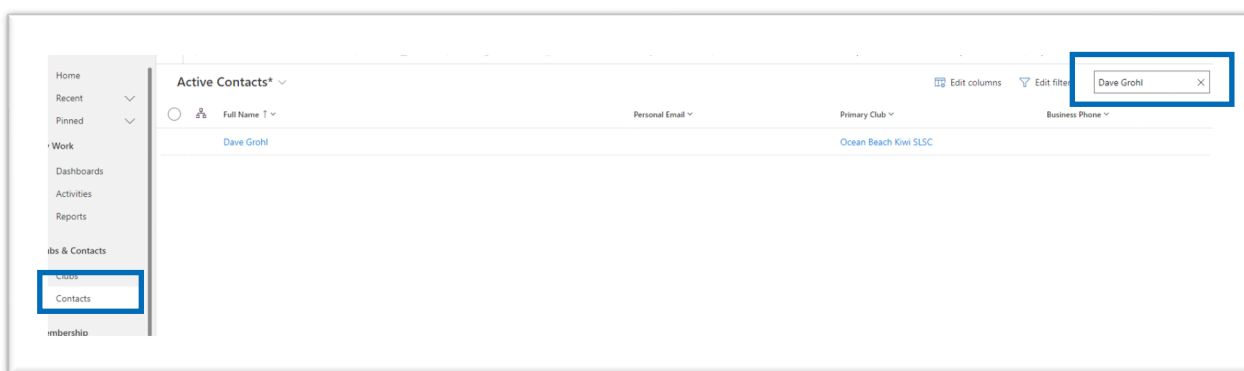
Vetting

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

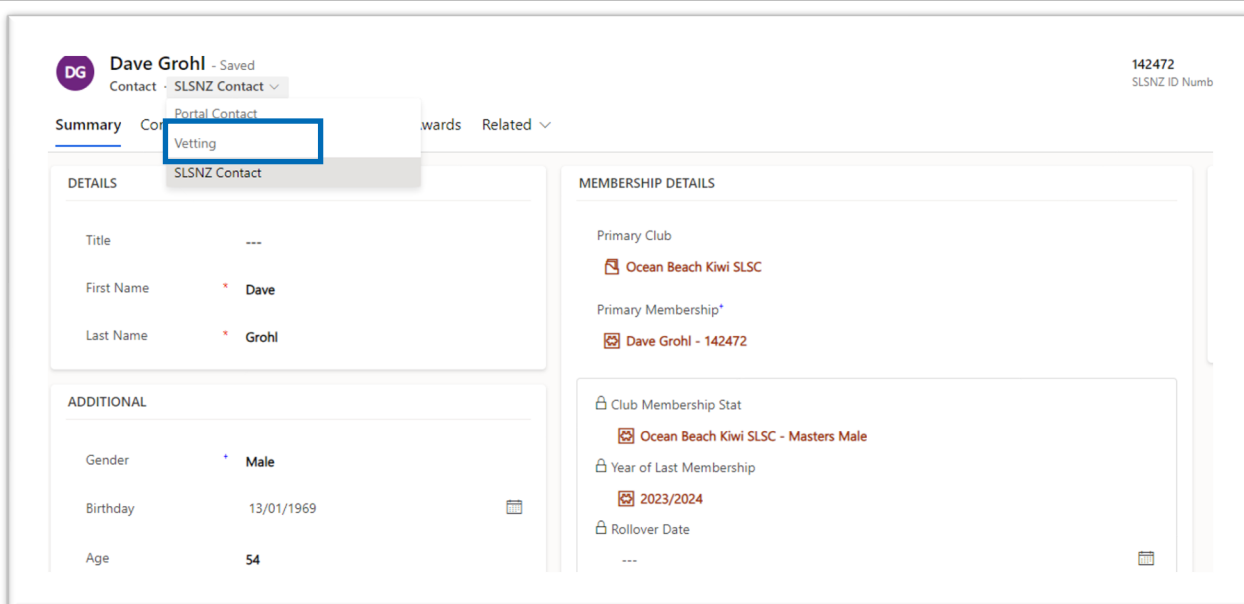
RECORD THE VETTING STATUS

CRM Security role required:	_SLSNZ – Vetting (Police Liaison)
Prerequisites	Contact must exist in the CRM

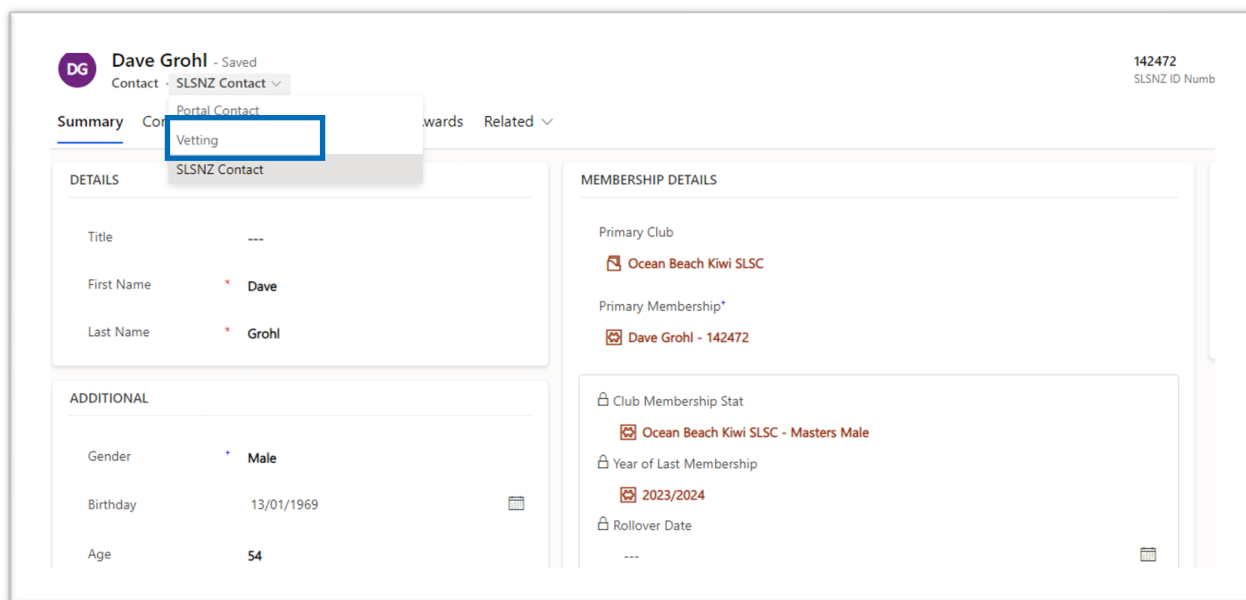
Step	Person	System	Step
1.	Administrator	CRM	In the Membership module, locate the Contact. Go to Contacts > Use the search box to find the contact.



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
----	---------------	-----	--



Dave Grohl - Saved
Contact · SLSNZ Contact

Summary Contact **Vetting** Awards Related

DETAILS

Title ---

First Name * **Dave**

Last Name * **Grohl**

ADDITIONAL

Gender * **Male**

Birthday 13/01/1969

Age **54**

MEMBERSHIP DETAILS

Primary Club
Ocean Beach Kiwi SLSC

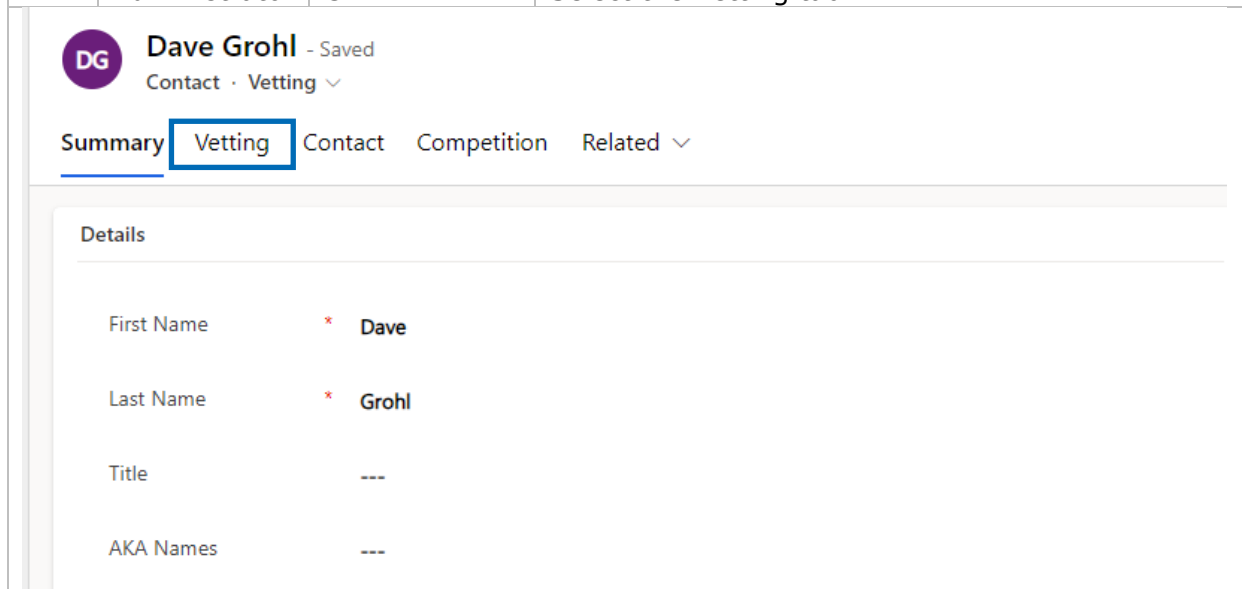
Primary Membership*
Dave Grohl - 142472

Club Membership Stat
Ocean Beach Kiwi SLSC - Masters Male

Year of Last Membership
2023/2024

Rollover Date ---

4.	Administrator	CRM	Select the Vetting tab
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Dave Grohl - Saved
Contact · Vetting

Summary **Vetting** Contact Competition Related

Details

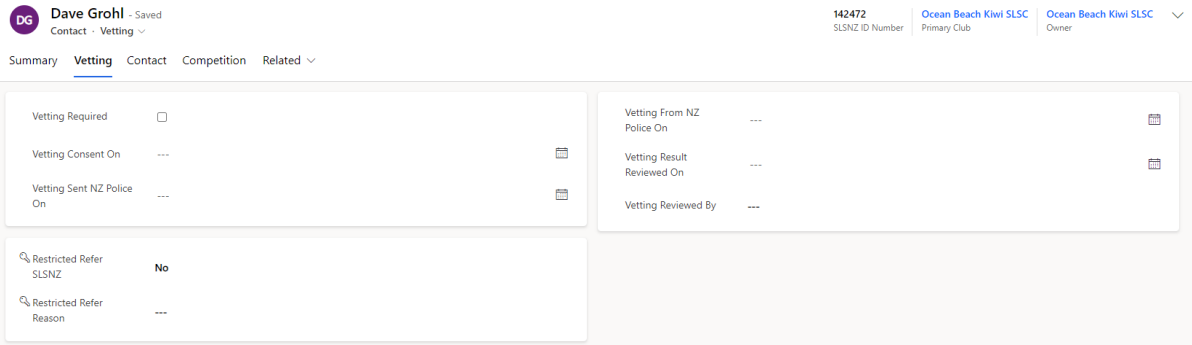
First Name * **Dave**

Last Name * **Grohl**

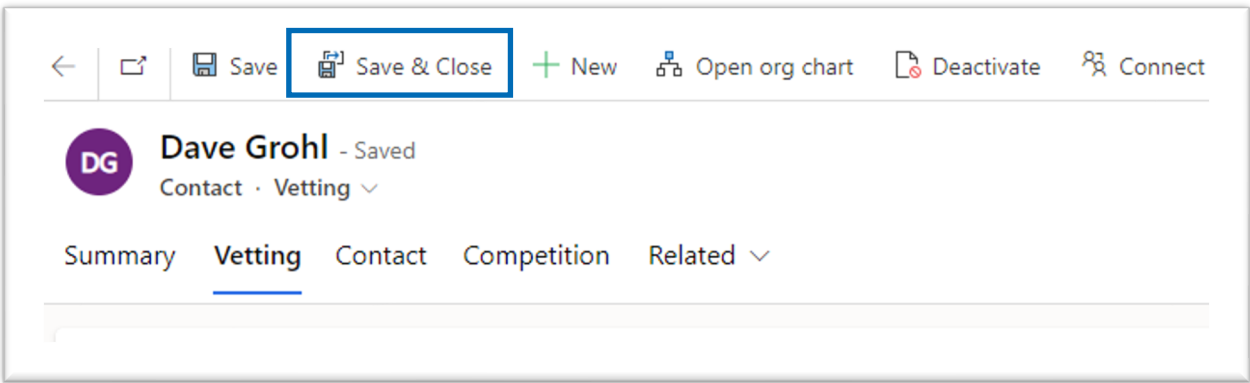
Title ---

AKA Names ---

5.	Administrator	CRM	<p>Complete the appropriate fields: Vetting required: tick Vetting consent on: when consent was approved by the contact</p> <p>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</p>
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5.	Administrator	CRM	To save changes click Save & Close.
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Courses and Awards overview

Points to note:

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

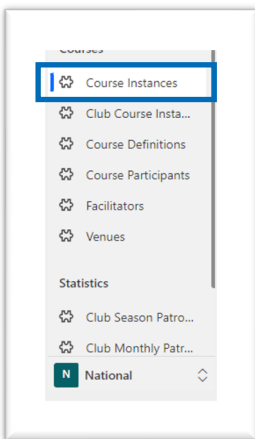
Courses

VIEW COURSE INSTANCES

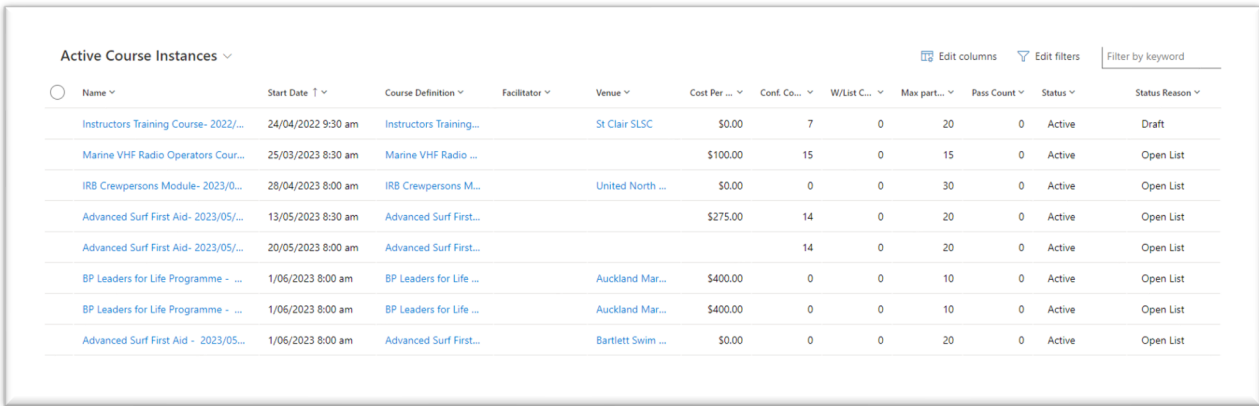
CRM Security role required:

_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



2.	Admin	CRM	<p>This will show you all active courses that are available.</p> <p>Even if you have Regional access, you can see active courses around the country.</p>
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Name	Start Date	Course Definition	Facilitator	Venue	Cost Per	Conf. Co.	W/List C.	Max part.	Pass Count	Status	Status Reason
Instructors Training Course- 2022/...	24/04/2022 9:30 am	Instructors Training...		St Clair SLSC	\$0.00	7	0	20	0	Active	Draft
Marine VHF Radio Operators Cour...	25/03/2023 8:30 am	Marine VHF Radio ...			\$100.00	15	0	15	0	Active	Open List
IRB Crewpersons Module- 2023/0...	28/04/2023 8:00 am	IRB Crewpersons M...		United North ...	\$0.00	0	0	30	0	Active	Open List
Advanced Surf First Aid- 2023/05/...	13/05/2023 8:30 am	Advanced Surf First...			\$275.00	14	0	20	0	Active	Open List
Advanced Surf First Aid- 2023/05/...	20/05/2023 8:00 am	Advanced Surf First...				14	0	20	0	Active	Open List
BP Leaders for Life Programme - ...	1/06/2023 8:00 am	BP Leaders for Life ...		Auckland Mar...	\$400.00	0	0	10	0	Active	Open List
BP Leaders for Life Programme - ...	1/06/2023 8:00 am	BP Leaders for Life ...		Auckland Mar...	\$400.00	0	0	10	0	Active	Open List
Advanced Surf First Aid - 2023/05...	1/06/2023 8:00 am	Advanced Surf First...		Bartlett Swim ...	\$0.00	0	0	20	0	Active	Open List

3.	Admin	CRM	<p>If you open the Course Instance, the General tab will show you the following:</p> <ul style="list-style-type: none"> - Start date of the course <ul style="list-style-type: none"> - 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
----	-------	-----	---

Marine VHF Radio Operators Course- 2023/03/25 - Saved
 Course Instance

General Prerequisites & Preparation Interest & Invoicing Club Participation Participants Marking & Outcome Related ▾

Summary

Course Definition	*  Marine VHF Radio Operators Course	Cost	\$100.00
Start Date	* 25/03/2023  8:30 AM	Min participants	1
Venue	---	Max participants	15
Facilitator	* 	Dates if multi day	---
Award Type	 Marine VHF Radio Operators Certificate	Schedule Flag	No
Last Application Deadline	25/03/2023	Owner	* 
Close Applications	No	Status Reason	Open List

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

Marine VHF Radio Operators Course- 2023/03/25 - Saved
 Course Instance

General **Prerequisites & Preparation** Interest & Invoicing Club Participation Participants Marking & Outcome Related ▾

Attendee Equipment	---	Pre-requisite Note	---
Attendee Prep	---		

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

General

Prerequisites & Preparation

Interest & Invoicing

Club Participation

Participants

Marking & Outcome

Related

Club Choice Wizard

N/A

Wizard - Region

Southern Region

+ New Club Course Inst...

Refresh

Run Report

<div></div>	Name	Course Ins...	Club	Pendi...	W/Lis...	Conf. ...	Inelig...	Pass ...	Fail C...	NYC ...	Invoice N...	Created On	Status	Status Rea...
	Marine VHF Radio Operators Course- 2023...	Marine V...	Nelson SL...	0	0	0	0	0	0	0		1/02/2023 2:1...	Active	Schedul...
	Marine VHF Radio Operators Course- 2023...	Marine V...	New Brigh...	0	0	0	0	0	0	0		1/02/2023 2:1...	Active	Schedul...
	Marine VHF Radin Operators Course- 2023...	Marine V...	North Bea...	0	0	0	0	0	0	0		1/02/2023 2:1...	Active	Schedul...

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

General Prerequisites & Preparation Interest & Invoicing Club Participation Participants Marking & Outcome Related ▾													
Active - All ▾ + New													
<input type="radio"/>	Name ▾	Course Instance ↑ ▾	Membership ▾	Club ▾	Booking Status ▾	Outcome ▾							
	Marine VHF Radio Operators Course- ...	Marine VHF Radio Operat...		South Brighton SLSC	Confirmed								
	Marine VHF Radio Operators Course- ...	Marine VHF Radio Operat...		South Brighton SLSC	Confirmed								
	Marine VHF Radio Operators Course- ...	Marine VHF Radio Operat...		South Brighton SLSC	Confirmed								
	Marine VHF Radio Operators Course- ...	Marine VHF Radio Operat...		Spencer Park SLSC	Confirmed								
	Marine VHF Radio Operators Course- ...	Marine VHF Radio Operat...		Waikuku Beach SLSC	Confirmed								
	Marine VHF Radio Operators Course- ...	Marine VHF Radio Operat...		North Beach SLSC	Confirmed								

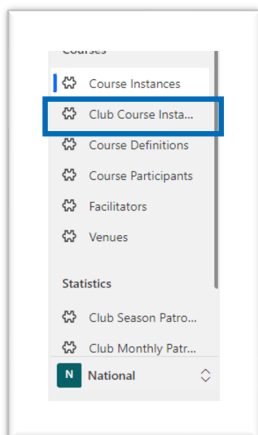
7.	Admin	CRM	The Marking & Outcome tab shows you the outcome of the course
----	-------	-----	---

General Prerequisites & Preparation Interest & Invoicing Club Participation Participants Marking & Outcome Related ▾													
	Pass Count	0	Has Been Marked No										
	Last updated:	16/08/2023 4:05 pm	Has Been Awarded No										
	NYC Count	0	Has Been Certificated No										
	Last updated:	16/08/2023 4:05 pm											
	Fail Count	0											
	Last updated:	16/08/2023 4:05 pm											

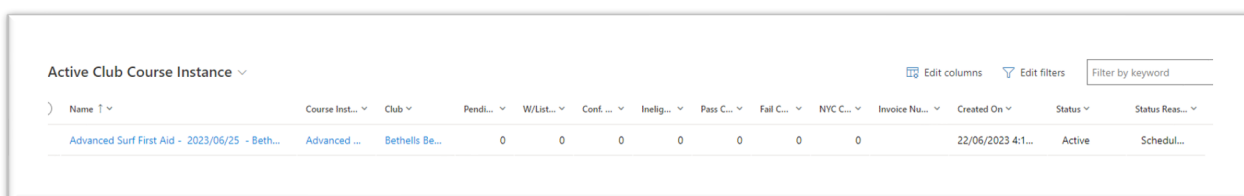
VIEW CLUB COURSE INSTANCES

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.
----	-------	-----	--


 A screenshot of the 'Active Club Course Instance' table. The table has a header row with columns: Name, Course Inst..., Club, Pendi..., W/List..., Conf..., Intellig..., Pass C..., Fail C..., NYC C..., Invoice Nu..., Created On, Status, and Status Reas... The first row of data shows: Advanced Surf First Aid - 2023/06/25 - Beth..., Advanced ..., Bethells Be..., 0, 0, 0, 0, 0, 0, 0, 22/06/2023 4:1..., Active, and Schedul...

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



Marine VHF Radio Operators Course- 2022/11/26 -Sumner SLSC - Saved

Club Course Instance

General Participants Related ▾

Course

🔒  Marine VHF Radio Operators Course- 2022/11/26

Start Date	*	26/11/2022
		8:30 AM
Dates if multi day		---
Venue		---
Award Type		 Marine VHF Radio Operators Certificate
Course Definition	*	 Marine VHF Radio Operators Course
Candidate Requirements		---
Attendee Equipment		---
Attendee Preparation		---

Participants

Marine VHF Radio Operators Course- 2022/11/26 -Sumner SLSC - Saved

Club Course Instance

General Participants Related ▾

Participants

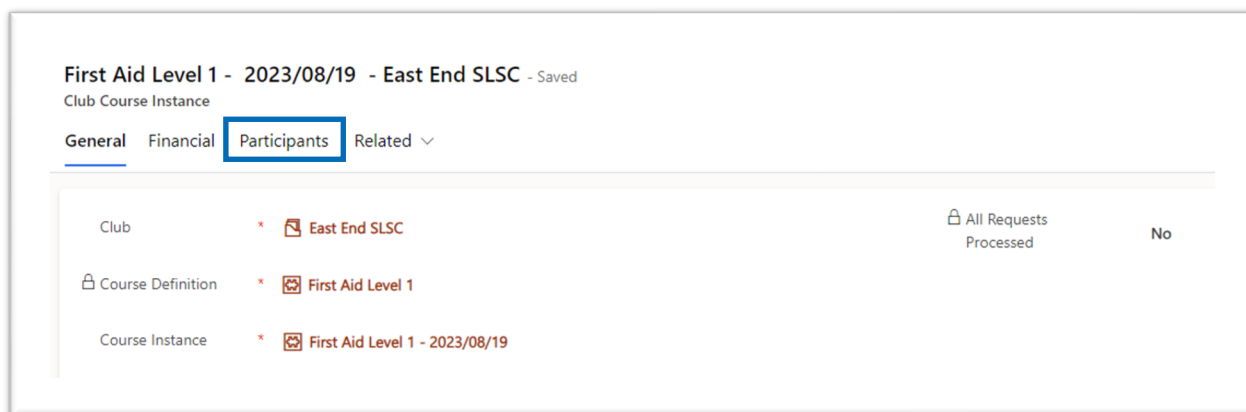
Membership ↑ ▾	Booking Status ↑ ▾
Adam	Confirmed
Blake	Confirmed
Jeti	Confirmed
Lily	Confirmed

1 - 4 of 5

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

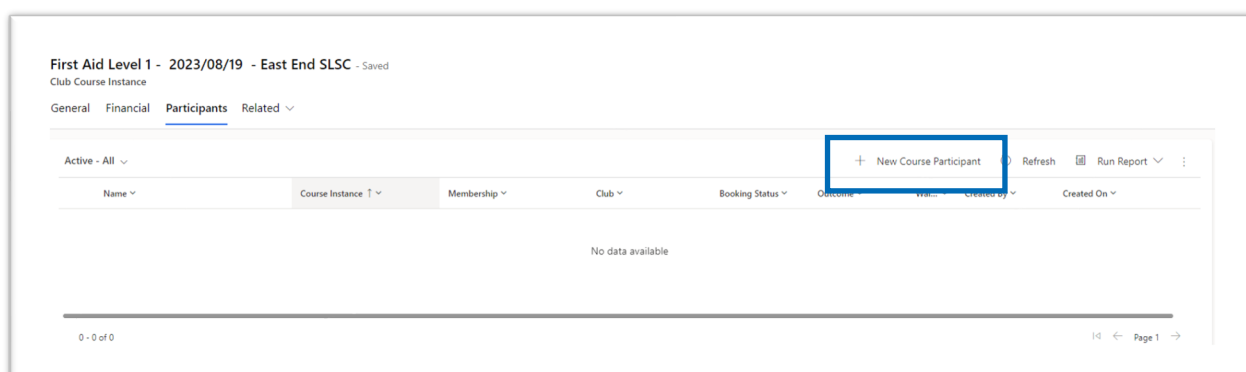


First Aid Level 1 - 2023/08/19 - East End SLSC - Saved
Club Course Instance

General Financial **Participants** Related ▾

Club	* East End SLSC	All Requests Processed	No
Course Definition	* First Aid Level 1		
Course Instance	* First Aid Level 1 - 2023/08/19		

2.	Admin	CRM	Click +New Course Participant
----	-------	-----	-------------------------------



First Aid Level 1 - 2023/08/19 - East End SLSC - Saved
Club Course Instance

General Financial **Participants** Related ▾

Active - All ▾

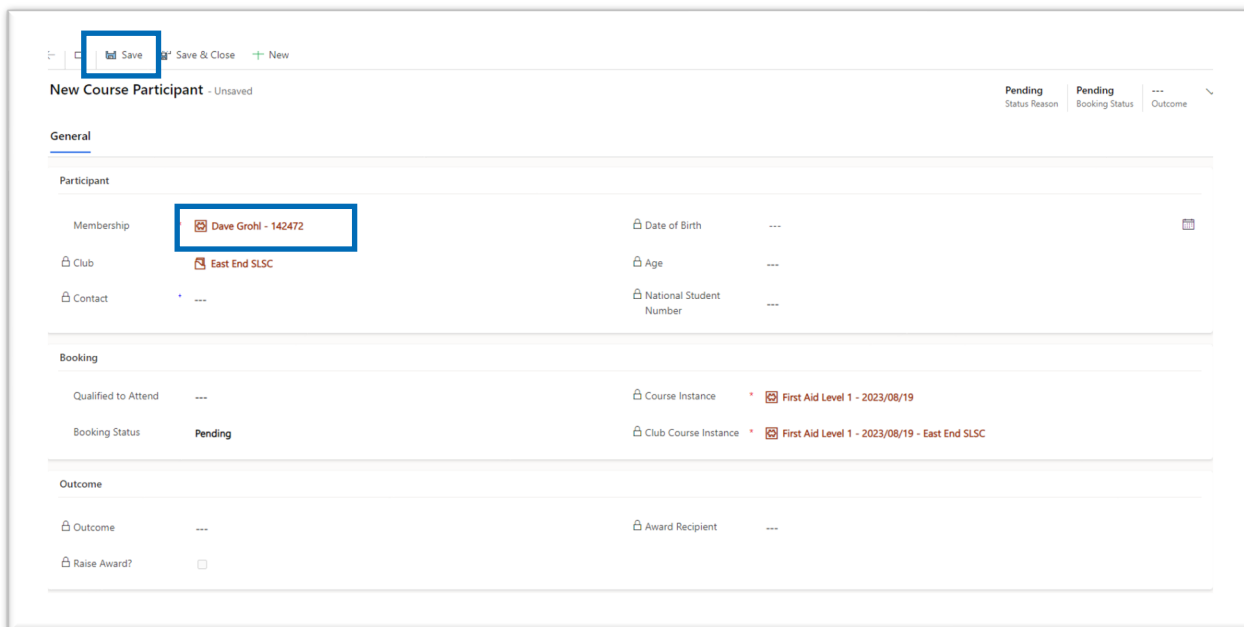
+ New Course Participant Refresh Run Report ▾ ⋮

Name ▾	Course Instance ▾	Membership ▾	Club ▾	Booking Status ▾	Course ▾	Name ▾	Created by ▾	Created On ▾
--------	-------------------	--------------	--------	------------------	----------	--------	--------------	--------------

No data available

0 - 0 of 0 Page 1

3.	Admin	CRM	In the Membership field, locate the member. Then click Save.
----	-------	-----	--



New Course Participant - Unsaved

Pending Status Reason Pending Booking Status --- Outcome

General

Participant

Membership **Dave Grohl - 142472** Date of Birth ---

Club **East End SLSC** Age ---

Contact --- National Student Number ---

Booking

Qualified to Attend --- Course Instance * **First Aid Level 1 - 2023/08/19**

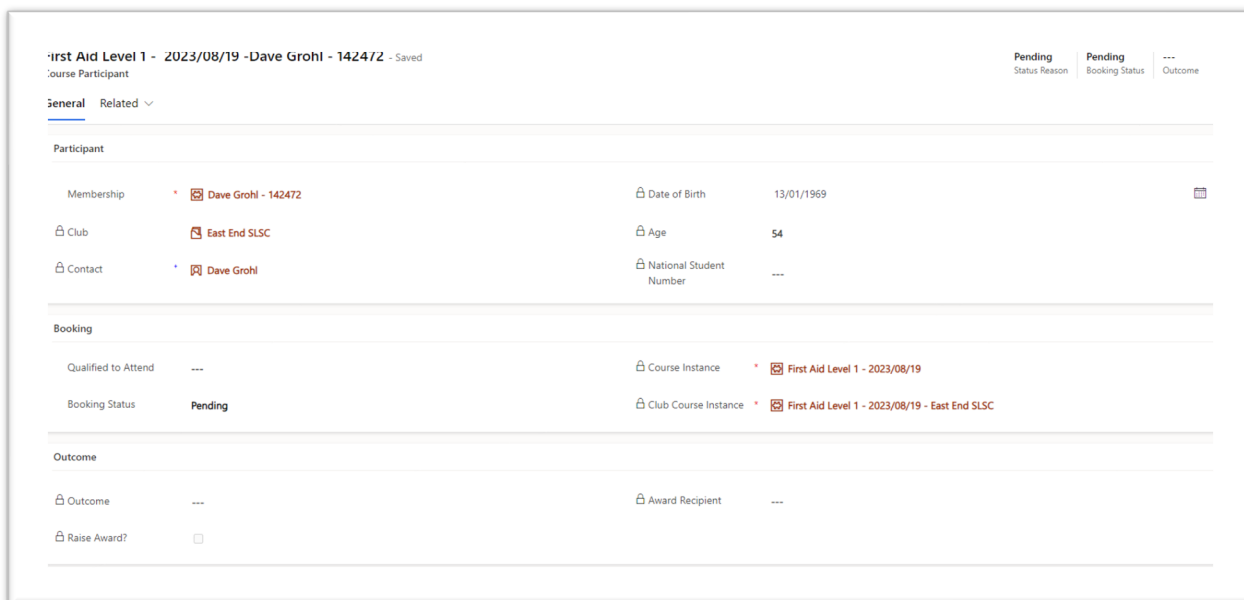
Booking Status **Pending** Club Course Instance * **First Aid Level 1 - 2023/08/19 - East End SLSC**

Outcome

Outcome --- Award Recipient ---

Raise Award? ☐

4.	Admin	CRM	Clicking Save will populate the member's data.
----	-------	-----	--



First Aid Level 1 - 2023/08/19 - Dave Grohl - 142472 - Saved

Pending Status Reason Pending Booking Status --- Outcome

General Related

Participant

Membership * **Dave Grohl - 142472** Date of Birth 13/01/1969

Club **East End SLSC** Age 54

Contact * **Dave Grohl** National Student Number ---

Booking

Qualified to Attend --- Course Instance * **First Aid Level 1 - 2023/08/19**

Booking Status **Pending** Club Course Instance * **First Aid Level 1 - 2023/08/19 - East End SLSC**

Outcome

Outcome --- Award Recipient ---

Raise Award? ☐

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

Home Clubs Club Patrols Member Lounge Waves Online Learning Join Surf

MY COURSES

Name ↑	Award Type	Start Date
First Aid Level 1 - 2023/08/19 -Dave Grohl - 142472	First Aid Level 1	20-08-2023 08:00:00

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.
----	--------	-----	---

First Aid Level 1 - 2023/08/19 -Dave Grohl - 142472 - Saved

Course Participant

Pending Status Reason Pending Booking Status --- Outcome

General Related

Participant

Membership * Dave Grohl - 142472 Date of Birth 13/01/1969

Club East End SLSC Age 54

Contact * Dave Grohl National Student Number ---

Booking

Qualified to Attend **Yes** Course Instance * First Aid Level 1 - 2023/08/19

Booking Status Pending Club Course Instance * First Aid Level 1 - 2023/08/19 - East End SLSC

Outcome

Outcome --- Award Recipient ---

Raise Award? ☐

7.	Admin	CRM	When the participant has been confirmed, click the arrow at the top right and a drop-down list will display.
----	-------	-----	--

First Aid Level 1 - 2023/08/19 -Dave Grohl - 142472 - Saved

Course Participant

Pending Status Reason Pending Booking Status --- Outcome

General Related

Participant

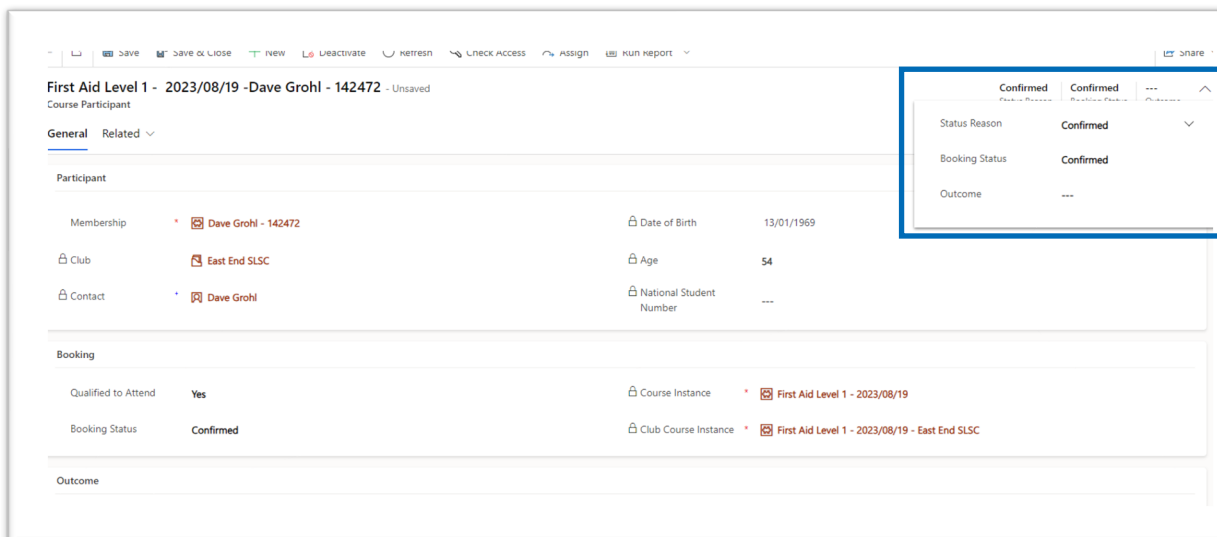
Membership * Dave Grohl - 142472 Date of Birth 13/01/1969

Club East End SLSC Age 54

Contact * Dave Grohl National Student Number ---

Booking

8.	Admin	CRM	Change the Status Reason and Booking Status to Confirmed. Click Save.
----	-------	-----	---



First Aid Level 1 - 2023/08/19 - Dave Grohl - 142472 - Unsavd
Course Participant

General Related

Participant

Membership * Dave Grohl - 142472 Date of Birth 13/01/1969

Club East End SLSC Age 54

Contact * Dave Grohl National Student Number ---

Booking

Qualified to Attend Yes Course Instance * First Aid Level 1 - 2023/08/19

Booking Status Confirmed Club Course Instance * First Aid Level 1 - 2023/08/19 - East End SLSC

Outcome

Confirmed Confirmed

Status Reason Confirmed

Booking Status Confirmed

Outcome ---

Awards

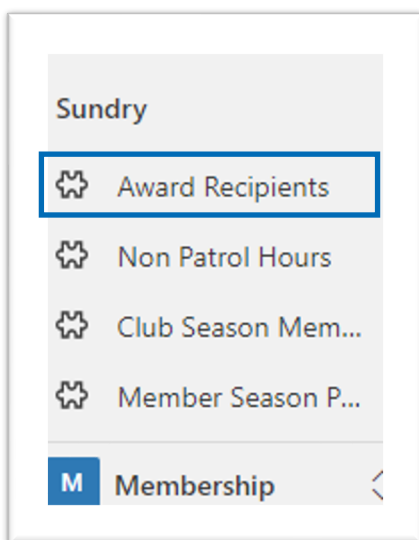
ADD AN AWARD RECIPIENT RECORD

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

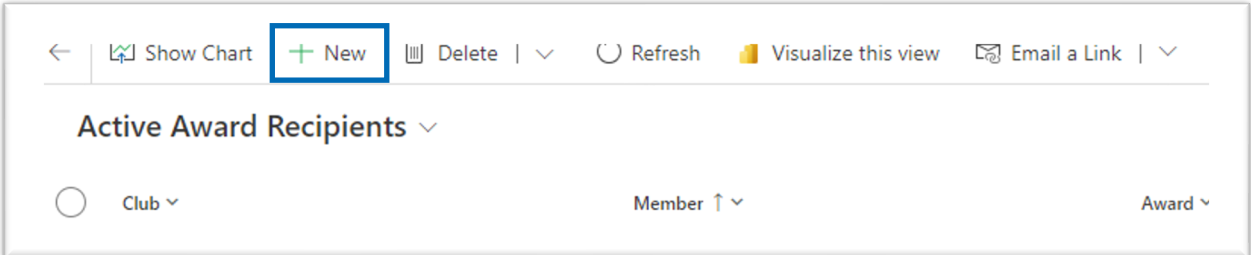
Points to note:

1. Although every Contact exists just once, they may hold multiple Membership records. We want to select the Membership held with their primary 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.

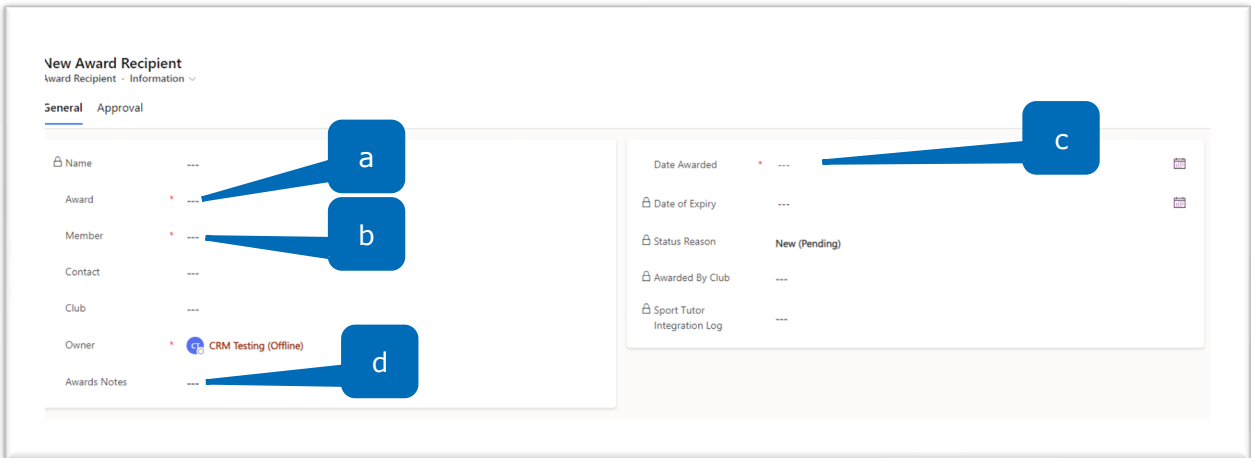
Step	Person	System	Step
1.	Award approver	CRM	In the Membership module, select Award Recipients



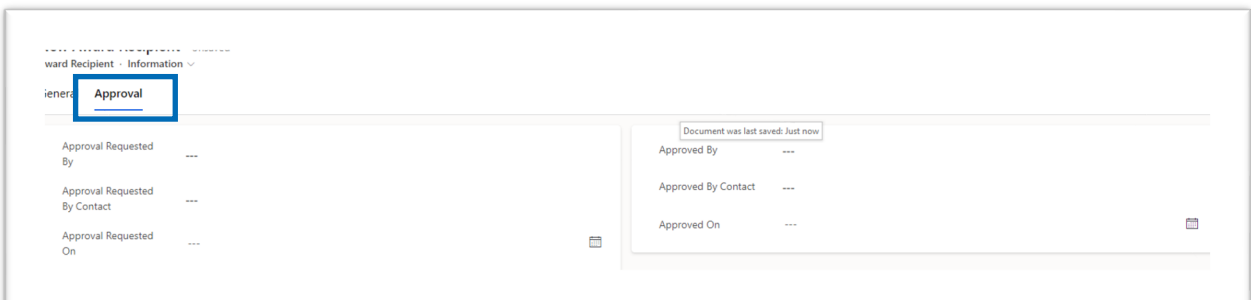
2.	Award approver	CRM	Click +New
----	----------------	-----	------------



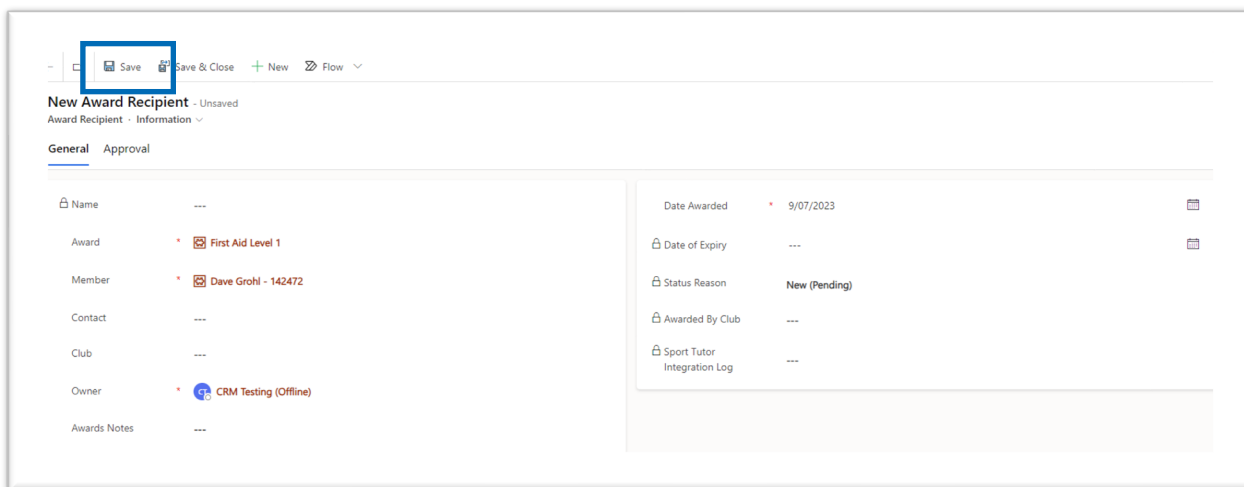
3.	Award approver	CRM	<p>Complete the following information:</p> <table border="1"> <tr> <td>a.</td> <td>Award</td> <td>Search for the award achieved</td> </tr> <tr> <td>b.</td> <td>Member</td> <td>Search for the member receiving the award</td> </tr> <tr> <td>c.</td> <td>Date awarded</td> <td>Enter the date the award was achieved</td> </tr> <tr> <td>d.</td> <td>Award notes</td> <td>Enter any notes needed, such as where the award was gained.</td> </tr> </table>	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.
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
----	----------------	-----	------------



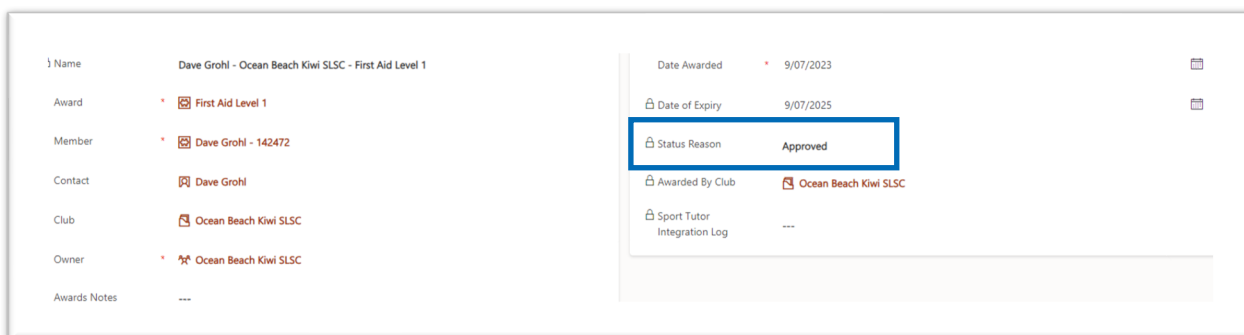
Save Save & Close + New Flow

New Award Recipient - Unsaved
Award Recipient - Information

General Approval

Name	---	Date Awarded	9/07/2023
Award	* First Aid Level 1	Date of Expiry	---
Member	* Dave Grohl - 142472	Status Reason	New (Pending)
Contact	---	Awarded By Club	---
Club	---	Sport Tutor Integration Log	---
Owner	* CRM Testing (Offline)		
Awards Notes	---		

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.
----	----------------	-----	---



Name Dave Grohl - Ocean Beach Kiwi SLSC - First Aid Level 1

Award * First Aid Level 1

Member * Dave Grohl - 142472

Contact Dave Grohl

Club Ocean Beach Kiwi SLSC

Owner * Ocean Beach Kiwi SLSC

Awards Notes ---

Date Awarded	9/07/2023
Date of Expiry	9/07/2025
Status Reason	Approved
Awarded By Club	Ocean Beach Kiwi SLSC
Sport Tutor Integration Log	---

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