## **PELHAM Training update** May 2021

In this session we are going to look at how to SEARCH PELHAM for records and how to view reports / summaries and export to Excel.

#### **Overview**:

Any person who is linked with your branch can be viewed by the branch. This includes:

- Current members and Member Administrators
- Lapsed members and their Member Administrators
- Coaches (if associated) whatever status
- Branch officials

You can also view:

- Lists of current, expiring and expired memberships
- Email lists
- Recently joined members
- Members eligible for certain badges
- Emails sent to member administrators, including system generated renewal invites

# Reminder: contacts vs Members vs Coaches

This is a SHARED SYSTEM, so some features are specifically for centres, others for branches however the same basic principles and information apply to both and Areas.

Within PELHAM every individual will have **one** record which will be associated to any contacts that are created against that person.

Once a contact is created their **roles** will be created against those Contacts or Membership will be associated.

Other records could be badges or tests achieved by members.

If contact details change they will only have to be updated once in PELHAM.





Option 1: use the Global Search which is at the top of every screen in PELHAM:



Enter the text you wish to search – this can be name of a person, branch, email address, or Pony Club Number

Ø PELHAM	Branch App				Q
Home	Categorized Search $$	Şearch	✓ Filter with	None 💙	

#### You can filter if preferred to only see contacts or branches:

Search	م	Filter with	None 🗸
			None Contact
			Branch
			Activity



## SEARCH Pelham – Results (3)

All records matching the search text input will be returned regardless of Membership status so the more precise your search, the more accurate the results:

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Contacts		
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nch App Categorized Search V	beryl.stringer@pcuk.org	This is also useful to
nch App Categorized Search ~ Contacts 651423	beryl.stringer@pcuk.org	This is also useful to check if email addresses are





Option 2: use the All Contacts in Navigation Menu

In the next slides we will see some commonly used and useful "views"

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

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Top Tip: The Read-only warning is displayed on some screens, mainly where the data is listed so you cannot edit directly from these screens. To make changes you need to click to open the record and you will then be able to make the changes permitted

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Click on "contacts" and the default view will be Current Branch Members:

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Many of you ask what this is; it is system generated when a new contact is created and has no relevance for Pony Club. It disappears over time.



To search ALL your branch contacts, select "All contacts":

You can search within any of these views and also Export to Excel if you wish. Remember if you do so to ensure any personal data is kept in a password protected file.

Current Branch Members (Branch) 🛩	
My Views	<b>^</b>
Current Branch Members - Renewal reminder sent	-12
Email - Expired Member Administrators (31Jan2020)	-12
Pelham Migration Summary - Members	-12
Recently joined members - within last 3 months with age	-12
System Views	
Current Branch Members (Branch)	×2
Active Coaches	-12
Active Volunteers	-12
Address List - Current Member Administrators	-17
Address List - Current Members	-17
All Contacts	-12
All Contacts - Addresses	-12

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# Views

Views are a way of collating records according to searches prebuilt for you.

**Branch Summary page** – **Members** will contain only those views pertinent to Branch Members or Contacts.

Address lists – requested as export available for downloading addresses All Contacts – everyone associated with your branch and with addresses Deactivated contacts – after a requested merge or deactivation of a contact (sometimes in error) they will display here. If deactivated in error, you can "activate" from here.

Email views – To generate Group Emails

Expired members

*Incomplete Applications (*ignore; future use potentially)

*Members expired within last 6 months* – useful to track lapsed members *Members expiring within 3 months* – useful to see whose membership may expire before an upcoming event etc.

*New Contacts* – recently created, can be useful to check duplicates *Recently joined/renewed members* – *last 3 months* – way to check most recently joined members especially those lapsed or transferred with no Member Approval email

*Memberships in progress (unpaid)* – help you to chase up unpaid memberships and/or understand why they are not appearing in Current Members

Members Coaches & Volunteers Achievement History Current Members 244 Last updated: 09/05/2021 22:06 Current Branch Members (Branch)  $\lor$ System Views Address List - Current Member Administrators Address List - Current Members All Contacts All Contacts - Addresses Current Branch Members (Branch) Current Branch Members (Subgrid) Current Members with Age/DOB Issue Deactivated Contacts Email - Current Members with email addresses Email - Expired Members with email addresses (last 90 days) Email - Current Member Administrators Email - Expired Member Administrators (last 90 days) Expired Members Incomplete Applications Members Expired within last 6 months Members Expiring within 3 Months New Contacts Recently joined/renewed members - within last 3 months

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### Views - 2

**Branch Summary page** – **Coaches & Volunteers** will contain only those views pertinent to volunteers, coaches and Pony Club roles. You cannot search from this view as it is based on the contact ROLE not the contact itself. To export to Excel from branch summary views, click the 3 dots on the far right

Branch App			ନ ଓ ନ + ନ 💩 ୨	В
← ÎıÎi Delete Č) Refresh ℂς Check Access ♀, Assign ເລ Email a Link Σ	🕉 Flow 🗸 🖷 Word Templates 🗸 📶 Run	Report 🗸		
A Read-only: You don't have access to edit this record.				
Heythrop Hunt Branch Members Coaches & Volunteers Achievement History Financial Admin	Branch) General Notes Financial Re	You cannot Search here but you can add Roles	Click 3 dots to export to Excel from here	
Active Coaches 🗸		+ New Contac	t Role 🖄 Add Existing Contact 🖒 Refresh 🗄	
✔         First Name (Contact) ∨         Last Name (Contact) ∨         Role ∨	CPD Next Due Date (Cont	$\sim$ $\mid$ Criminal Record Check Ex $\sim$ $\mid$ First Aid Expiry Date (Cont $\sim$	Safeguarding Expiry Date $\checkmark$ Start Date $\checkmark$	
Coach -	Supervised 31/03/2021	21/05/2023 11/01/2024	07/06/2023 17/11/2020	
Coach -	Accredited 05/02/2023	31/07/2022 31/08/2021	14/06/2022 12/11/2020	
Coach -	Accredited 14/01/2022	10/05/2022 31/08/2021	02/12/2022 01/01/2009	

Active Coaches $\checkmark$
System Views
Active Coaches
Active Volunteers
Previous Pony Club Roles
Expired Coaches
Current Pony Club Roles

Active Coaches – displays all coaches with status Supervised or Accredited

Active Volunteers – displays all contacts set up as Volunteers

*Previous Pony Club roles:* if someone has been set up as a coach, volunteer or branch official but that role has expired, will display here

Expired coaches - displays all coaches with status Expired

Current Pony Club roles – displays all current roles at the branch, coach, volunteer, branch official

# Views – 3 via Navigation menu

-12

-13

-13

🕜 PELHAM	Bra	My Views
		Current Branch Members - Renewal reminder sent
Home		Email - Expired Member Administrators (31Jan2020)
Recent 🗸		Pelham Migration Summary - Members
Pinned 🗸		Recently joined members - within last 3 months with age
ernance		System Views
Branches		Current Branch Members (Branch)
Activities		Active Coaches
		Active Volunteers
nbership		Address List - Current Member Administrators
Contacts		Address List - Current Members
Current Members		All Contacts
Membership Appli		All Contacts - Addresses
ches & Volunteers		Coaches With Qualifications Expiring Within 3 Months
Coach Directory		Current Members - Emergency Contacts
Active Coaches		Current Members - Preferences and Requirements
Expired Coaches		
Active Volunteers		

These same views can be accessed from Contacts and Coach tabs in Navigation menu If we go back to the Navigation menu (Left Hand bar) there are some additional views available. The most useful are: Current Branch members – renewal reminder sent *Recently joined with age* Current members – emergency contacts can be exported and downloaded for use at rallies

*Current members – preferences and requirements – as above* 

Eligible for Gold Achievement Badge	-0
Eligible for Gold Mini Achievement Badge	-0
Email - Current Members with email addresses	-0
Email - Expired Members with email addresses (last 90 days)	-0
Email - Current Member Administrators	-0
Email - Expired Member Administrators (last 90 days)	-0
Email - Lapsed Members in Last Year	-0
Expired Coaches	-0
Expired Members	-0
Incomplete Applications	-0
Members Expired within last 6 months	-0
Members Expiring within 3 Months	-0
Members with Blue Cross Equine Welfare Badge	-0
Members with Gold Achievement Badge	-0
Members with Mini Gold Achievement Badge	-0
Memberships in progress (Unpaid)	-0

Various views around badge eligibility and received badges

Top Tip:

If there is a specific view you always wish to see first, use the pin 😐 to pin that view always to appear first



Home

Recent

Pinned

Governance

Branches Activities

Membershir R Contacts Current Men

Membership

CPD Activities

Coaches & Volun

Trillium 🗙 PELHAM - PEOPLE, EVENTS, LEARNING, HORSES, ADMINISTRATION, MEMBERS

## Views 4 - Coaches

Coa	ches & Volunteers
ŝ	Coach Directory
Ô	Active Coaches
Ô	Expired Coaches
â	Active Volunteers

CPD Activities

Coach Directory – will link you straight to the Pony Club Coach Directory on the main website Active Coaches – does not display coach status as it is linked to the Contact, but you can double click on a record here and go to the contact detail record. You can also Search this view. Expired Coaches – as above Active Volunteers – as above CPD Activities – displays all CPD activities – can be searched by CPD name, not contact

Achievements/Tests		
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Current Members - Achievement	His
System Views	it
Current Members - Achievement History	-12
All Qualification History	-₽)
Coaching - Current Qualifications	-Þ )
Current Members - All Achievements and Tests	₽,
Current Members - Blue Cross Badge	-12
Current Members - Gold Badge	-12
Current Members - Mini Gold Badge	-⊟ I
Current Members - Test History	-¤ I
Everyone - Test & Achievement History	-¤ ,
Inactive - Deactivated Qualification History	-12

Achievement History contains specific views on member badges and tests: Current Members – Achievement history: summary of current members badges All Qualification History – list of every member and all their qualifications Coaching – Current Qualifications: list based on certification Current members – All achievements and Tests Current Members – Blue Cross / Gold / Mini Gold – lists members with these badges Everyone: Test and Achievement history – all badges and tests

Inactive – deactivated qualification history – record of anything deactivated

