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.
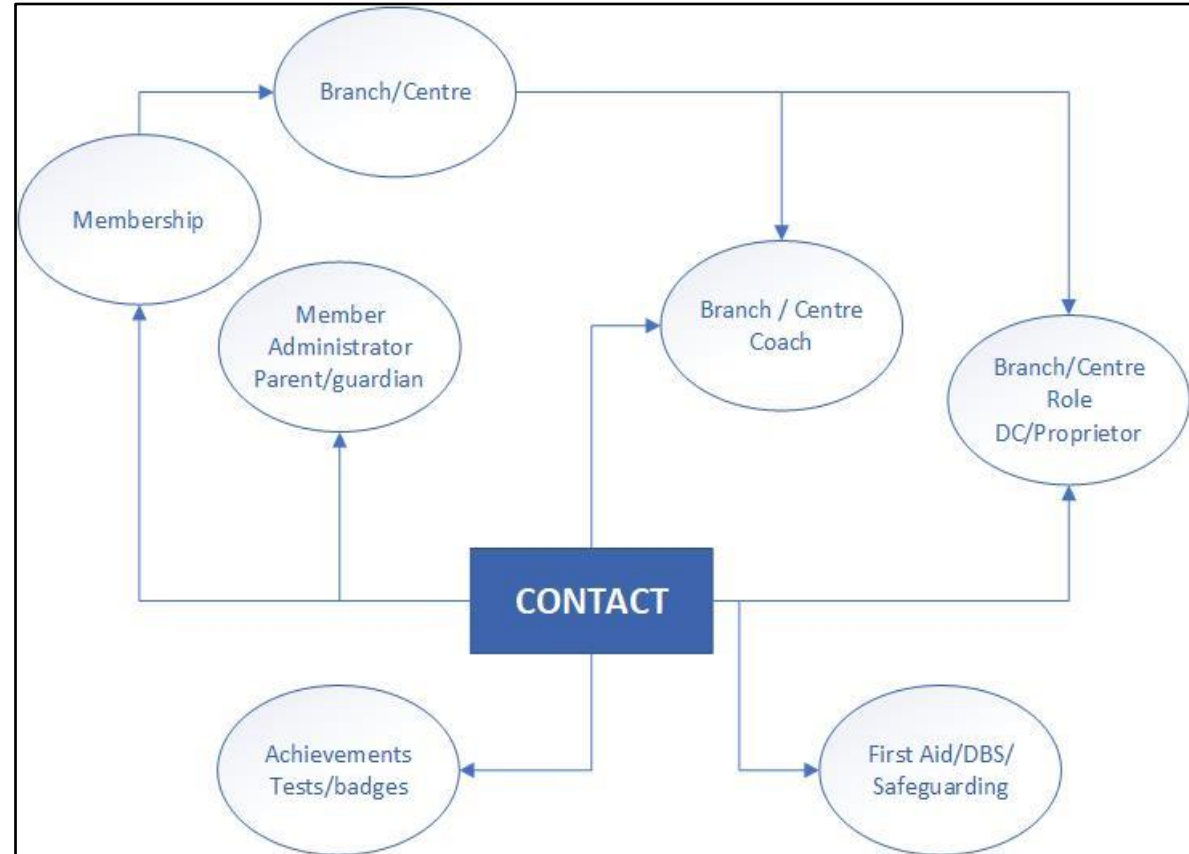
Search PELHAM -2

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

Global Search

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

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

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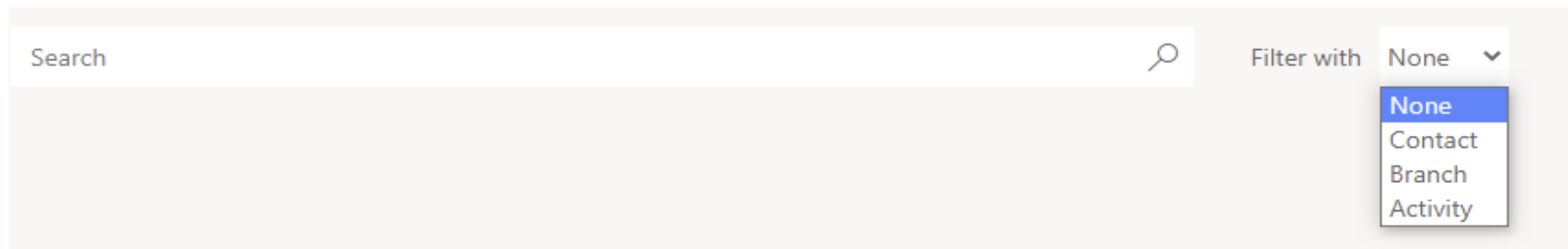
SEARCH Pelham – Results (3)

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:

This is also useful to check if email addresses are duplicated

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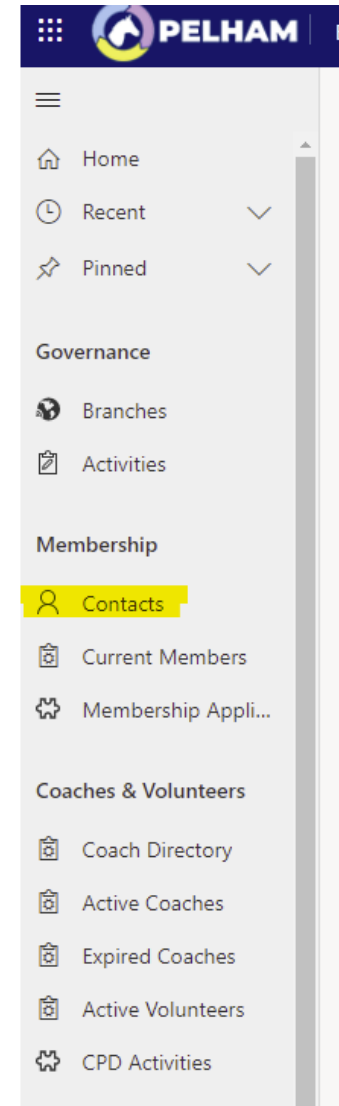# Search PELHAM - 4

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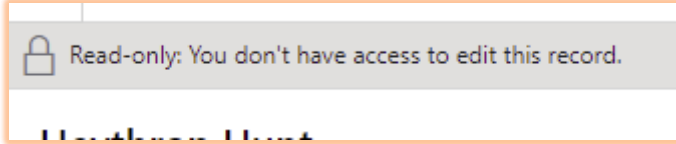
Top Tip: The Read-only warning is displayed on some screens, mainly where the data is listed so you cannot edit directly from these screens. To make changes you need to click to open the record and you will then be able to make the changes permitted


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Search PELHAM - 5

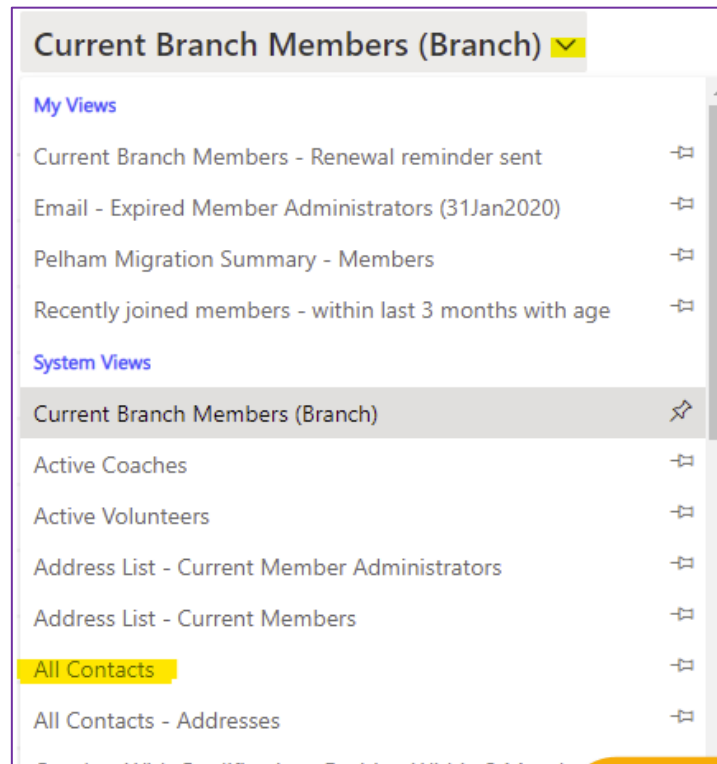Click on "contacts" and the default view will be Current Branch Members:

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.

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Search PELHAM - 6

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

Current Branch Members - Renewal reminder sent

Email - Expired Member Administrators (31Jan2020)

Pelham Migration Summary - Members

Recently joined members - within last 3 months with age

System Views

Current Branch Members (Branch)

Active Coaches

Active Volunteers

Address List - Current Member Administrators

Address List - Current Members

All Contacts

All Contacts - Addresses

Branch App

← | ⬚ Show Chart + New ↻ Refresh ⤨ Flow ⌄ ▥ Run Report ⌄ ▦ Excel Templates ⌄ ▦ Export to Excel | ⌄ ▦ Import from Excel | ⌄ ⌕ Quick Campaign ⌄ ⬚ Op...

Type the name you wish to search

All Contacts ⌄

you can Export any view to Excel from here

✓	Pony Club Number ⌄	First Name ⌄	Last Name ↑ ⌄	Is Parent/Guardian ⌄	...ary Centre ⌄	Membership Status ⌄	Member Type ⌄	Membership Riding ⌄	Membership Expiry... ⌄
				No	Heythrop Hunt	---	Expired	---	---	
				Yes	Heythrop Hunt	---	---	---	---	
				No	Heythrop Hunt	---	Expired	---	---	

Search this view 🔍

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) ∨

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
Memberships in progress (Unpaid)

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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

*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

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Views – 3 via Navigation menu
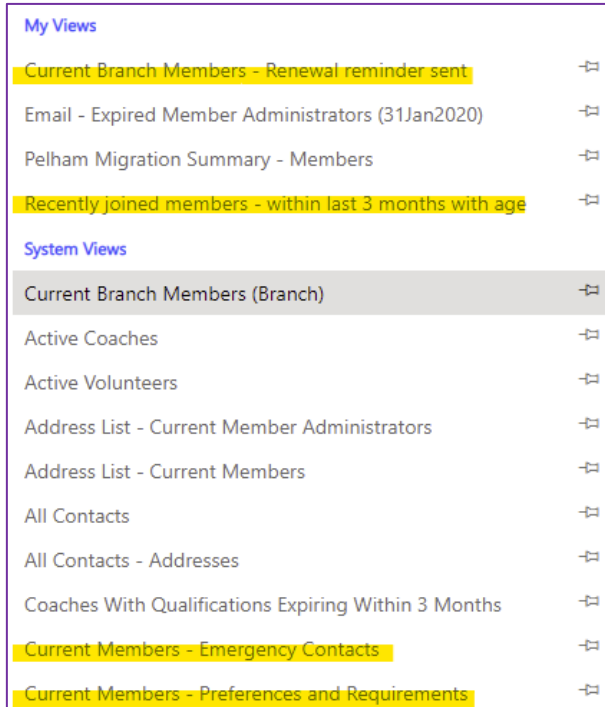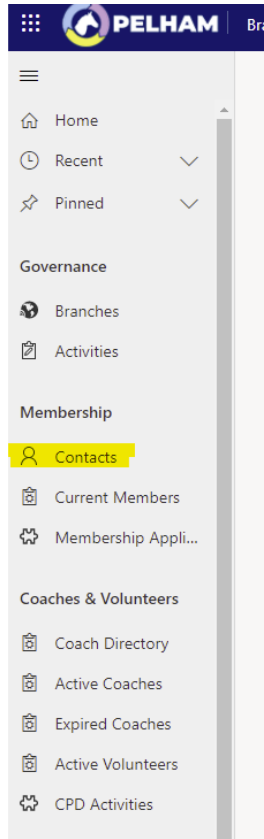
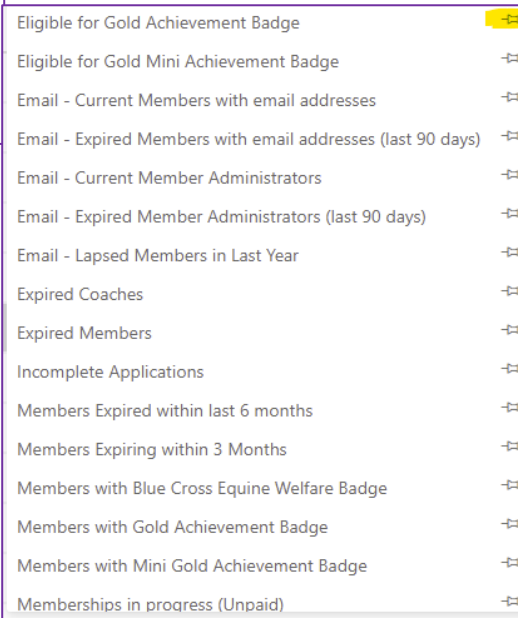If we go back to the Navigation menu (Left Hand bar) there are some additional views available. The most useful are:

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

Various views around badge eligibility and received badges

These same views can be accessed from Contacts and Coach tabs in Navigation menu
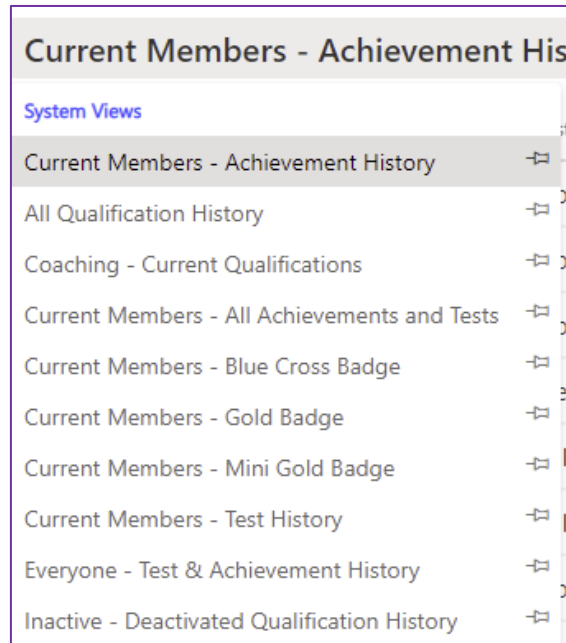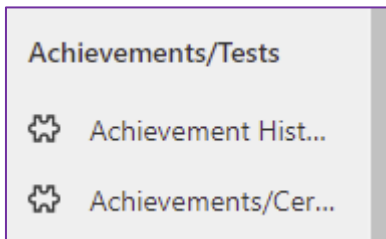
Top Tip:
If there is a specific view you always wish to see first, use the pin to pin that view always to appear first

Views 4 - Coaches

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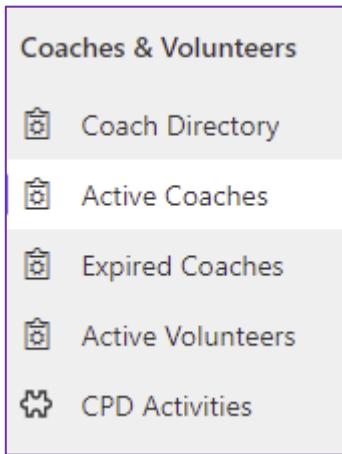
Coach Directory – will link you straight to the Pony Club Coach Directory on the main website
Active Coaches – does not display coach status as it is linked to the Contact, but you can double click on a record here and go to the contact detail record. You can also Search this view.
Expired Coaches –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

Achievements/Tests
- Achievement Hist...
- Achievements/Cer...

Current Members - Achievement His

System Views

Current Members - Achievement History	
All Qualification History	
Coaching - Current Qualifications	
Current Members - All Achievements and Tests	
Current Members - Blue Cross Badge	
Current Members - Gold Badge	
Current Members - Mini Gold Badge	
Current Members - Test History	
Everyone - Test & Achievement History	
Inactive - Deactivated Qualification History	

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

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