

PELHAM Training update

Update personal details in PELHAM

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

Branch Officials, Centre Coordinators, Area Reps can create and edit the following:

- Add new contacts (for coaches or new volunteers)
- Update title, first and last names, gender, DOB, email and phone numbers – Members, Member Administrators, Coaches
- Update postal address

Centre Proprietors can edit the following:

- Update title, first and last names, gender, DOB, email and phone numbers – Members, Member Administrators, Coaches
- Update postal address

Reminder: contacts vs Members vs Coaches

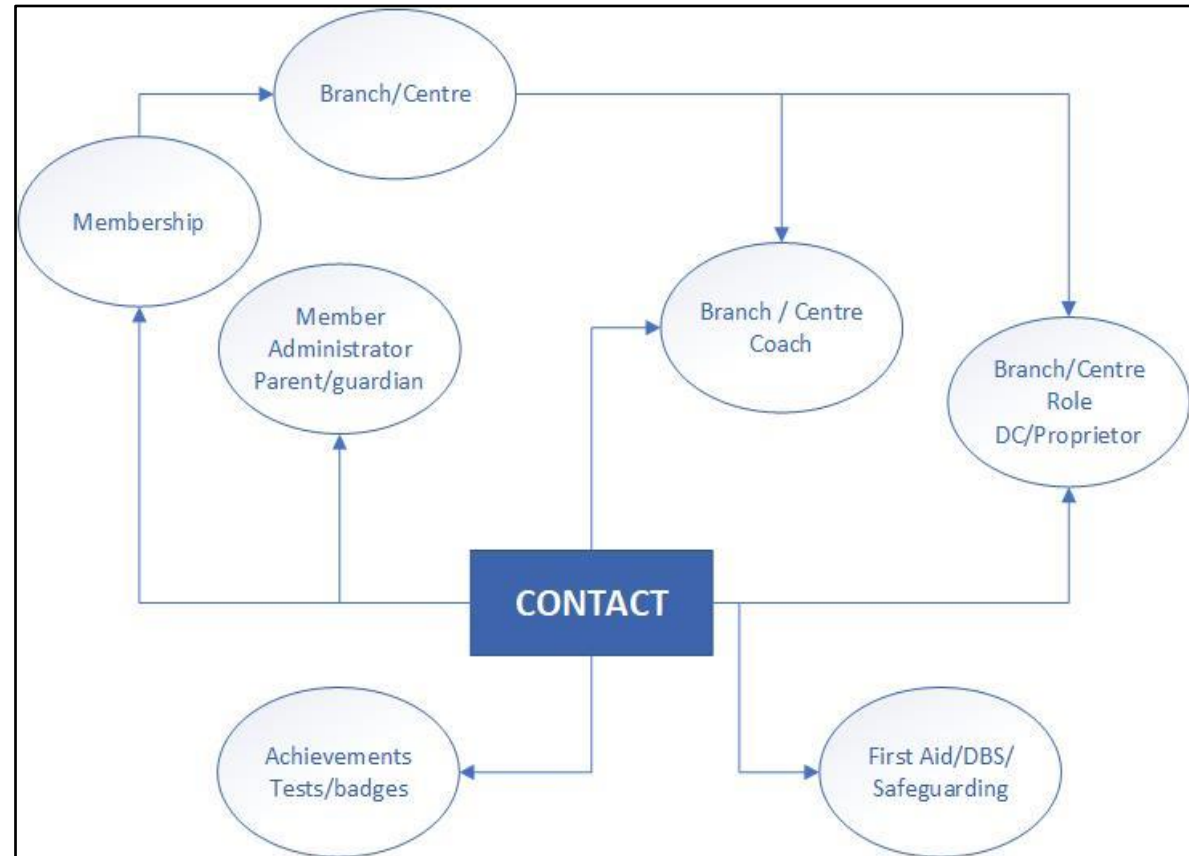
This is a SHARED SYSTEM, so some features are specifically for centres, others for branches however the same basic principles and information apply to both and Areas.

Within PELHAM every individual person will have **one** contact record which will be associated to contacts that they are linked with, e.g. Parents, Children, Emergency Contacts.

Each contact will also be associated with roles that they undertake, memberships they have, or for tests, badges and certifications such as CPD, Safeguarding, First Aid, DBS, etc.

Other records could be badges or tests achieved by members.

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



Update Contacts

Step 1: find the contact you wish to update using the various search options available (you will have a preferred option).

The screenshot displays the Pelham Branch App interface. At the top, there is a dark blue header with the Pelham logo and 'Branch App' text. A search bar is present with a magnifying glass icon and the word 'Search'. Below this, a table titled 'Current Branch Members (Branch)' is shown. The table has several columns: a checkbox, Pony Club Number, First Name, Last Name, Date of Birth, Age 1st Jan, Membership Riding, Membership Expiry, Latest Test (Passed), Date of Last Test (Passed), Member Administration, Email (Member Administrator), and Emergency 1 Contact. The table contains several rows of data, with some cells blurred. Three yellow callout boxes provide instructions: 'Type in Search criteria' points to the search bar; 'Use Filter to choose other Views' points to the 'Current Branch Members (Branch)' dropdown; and 'Enter search text here to search this view ONLY' points to the search input field within the table view. A fourth callout box, 'This can be ignored', points to a small icon in the bottom left corner of the table area.

Type in Search criteria

Use Filter to choose other Views

Enter search text here to search this view ONLY

This can be ignored

	Pony Club Num...	First N...	Last N...	Date of Birth	Age 1st Jan...	Membership Riding	Membership Expiry ...	Latest Test (Passed)	Date of Last Test (Pa...	Member Administrat...	Email (Member Administrator)	Emergency 1 Contact
					5	Riding	08/03/2022	---	---			
					11	Riding	22/06/2021	---	---			
					14	Riding	31/01/2022	Test - C Standard	03/06/2018			
					5	Riding	07/03/2022	---	---			
					3	Riding	07/03/2022	---	---			
					15	Riding	05/02/2022	---	---			

Update Contacts

Contact summary page. This is the same for ALL contact types, however the DOB and Gender is mandatory for members. Most members will NOT have an email address.

Branch App

Save Save & Close + New Deactivate Connect Create Gift Aid Declar... Create Direct Debit M... Pay Multi Transactions Create Membership Renew Membership Update Family

ES Emma Stringer Contact

Active Branch Member Paid
Pony Club Number Memb. Status Member Type Membership Payment Status

Summary Addresses Family Membership Achievements Related

Basic information

Select Title * Miss	Member Administrator Beryl Stringer	Date of Birth
First Name * Emma	Address Same as Member Administrator? No	Age 1st Jan (Current Year) 19
Last Name * Stringer	Additional Requirements No	Gender Female
Is Parent/Guardian <input checked="" type="checkbox"/> No	Additional Information	
Known As ---		
Middle Name ---		

Membership Information

Member Type	Branch Member
Branch	Heythrop Hunt
Membership Riding	Riding
Membership Expiry Date	31/01/2022

Member Related Information

3rd Party Contact	Allow
Photo Rights Declaration	Allow
Terms & Conditions Declaration	Yes
End of Eligibility Restriction	---
Previous Branch	---
Previous Centre	---
Membership First Join Date	01/01/2007

Contact Details


Primary Email	Mobile Phone
Preferred Email Personal	Home Phone ---
Personal E-mail	Business Phone ---
Work E-mail ---	

Annotations:

- A Padlock symbol means you cannot edit that field
- On this screen you can edit: Title, First Name, Last Name, DOB, Gender, Phone
- To edit email address, delete the PERSONAL email and input correct.

Update Contacts

Contact summary page. At the bottom of the screen you can view and edit Emergency Contacts:

Emergency Contact			
Emergency 1 Contact	 Beryl Stringer	Emergency 2 Contact	---
Emergency 1 Full Name	Beryl Stringer	Emergency 2 Full Name	Barry Stringer
Emergency 1 Phone	<input type="text"/>	Emergency 2 Phone	<input type="text"/>
Emergency 1 Relationship (to Member)	---	Emergency 2 Relationship (to Member)	---

Here you can add second contact by typing a name - does NOT have to exist in PELHAM as separate contact

Update Email Address - detail

Full guidance is in the Pelham user guide.

- Duplicate email addresses are not permissible in the system.
- Following the migration, many correct email addresses were attached to the member, not the member administrator.
- Most of that has been resolved now, however if you need to change a member admin email address:
 - you must **check FIRST** if the same email already exists on the member, or elsewhere in the system, and remove if so.

Top tip:

To check if an email address is in the system multiple times, use the Search function which will return all records associated with that email address. You can then remove it from those records and update the record you need

Update Email Address - detail

Step 1

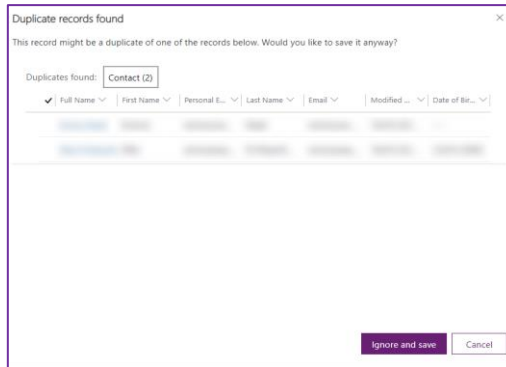
Contact Details	
Primary Email	beryl.stringer@pcuk.org
Preferred Email	Personal
Personal E-mail	beryl.stringer@pcuk.org
Work E-mail	---

Is driven from Preferred Email. Cannot be updated directly

Normally this is the email to change

Step 4

If this screen appears, press Ignore and Save as it sometimes counts the Primary email as a duplicate



Duplicate records found

This record might be a duplicate of one of the records below. Would you like to save it anyway?

Duplicates found: Contact (2)

Full Name	First Name	Personal E-mail	Last Name	Email	Modified	Date of Birth
...
...

Ignore and save Cancel

Step 2

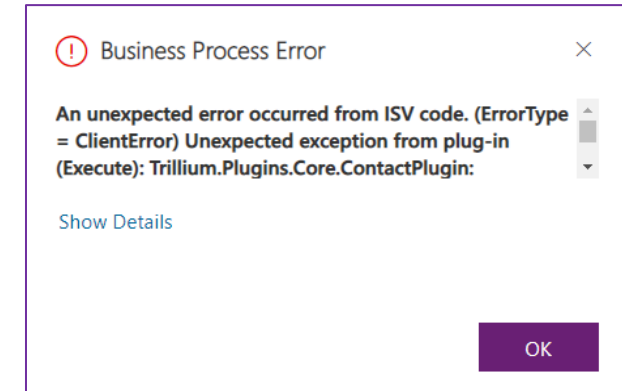
Contact Details	
Primary Email	beryl.stringer@pcuk.org
Preferred Email	Personal
Personal E-mail	beryl.stringer@pcuk.org
Work E-mail	---

Delete and type correct address

Step 3 PRESS SAVE

Step 5

If this screen appears, there is definitely a duplicate. If you cannot find it, please raise a support ticket as it may be that the duplicate is on a record that you do not have access to. We will then resolve the issue.



Business Process Error

An unexpected error occurred from ISV code. (ErrorType = ClientError) Unexpected exception from plug-in (Execute): Trillium.Plugins.Core.ContactPlugin:

Show Details

OK

Update Contacts summary

Contact summary page. This is the same for ALL contact types – see below sample Coach.

Branch App

Save Save & Close + New Deactivate Connect Create Gift Aid Declar... Create Direct Debit M... Pay Multi Transactions

JH Jess Hooley
Contact

Summary Addresses Family Membership Achievements Coach/Volunteer Preferences Related

Basic information

Select Title *	Member Administrator	Date of Birth
First Name *	Address Same as Member Administrator? Yes	Age 1st Jan (Current Year)
Last Name *	Additional Requirements	Gender Female
Is Parent/Guardian +	Additional Information	
Known As		
Middle Name		

Editable:
Title, First and Last Name
DOB and gender (if entered/known)
Email and phone numbers

Contact Details

Primary Email	Mobile Phone
Preferred Email Personal	Home Phone
Personal E-mail	Business Phone
Work E-mail	

Update Contact Address

Select Addresses tab from the Contact Summary Screen.

NB: to change addresses for a family, update the Member Administrator first and child addresses should be updated automatically

Branch App

BS Beryl Stringer
Contact

651423
Pony Club Number

Membership Payment

Summary **Addresses** Family Membership Preferences Related

Primary Address

Address Merged Address

Primary Address: Street 1 [Redacted] Primary Address: Street 2 Middle Barton Primary Address: Street 3 ---

Primary Address: City Chipping Norton Primary Address: County --- Primary Address: Post [Redacted]

Primary Address: Country United Kingdom

Merged Address

Merged Address
Merged Address
Home
Work
ODTS Overseas Address
Additional Contact

Click on “merged” address and select “home”

Update Contact Address

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

Merged Address

Address

General Loqate Notes Related

Address Name	*	Home
Address Type	*	Home
Country (Loqate)		United Kingdom
Postal Code	*	OX77BU

Delete existing post code and type new one

Select the address from the post code lookup table and Save the record

sy16 1r

SY16 1RA Heol Y Coleg, Newtown - 82 Addresses >

SY16 1RB New Road, Newtown - 6 Addresses >

Countryside Council For Wales, Ladywell House, Park Street Newtown, SY16 1RD

SY16 1RE Glandwr, Newtown - 33 Addresses >

SY16 1RF Clos Glandwr, Newtown - 25 Addresses >

SY16 1RG Heol Pengwern, Newtown - 58 Addresses >

SY16 1RH Minafon, Newtown - 10 Addresses >

Primary Address

Address Home

Primary Address: Street 1	Primary Address: Street 2	Primary Address: Street 3
Primary Address: City	Primary Address: County	Primary Address: Post Code
Primary Address: Country United Kingdom		

How to add a New Contact

You have permissions to add a new contact record (person) in the system if they do not already exist. Examples would be new coaches, volunteers or committee members (if not already on as parents)

There are 2 ways to find the Add Contacts screen.

Either from the Branch summary screen, +New Contact on Right:

Members Coaches & Volunteers Achievement History Financial Admin (Branch) General Notes Financial Related

📅 Current Members 244

Last updated: 12/05/2021 00:06

Current Branch Members (Subgrid) ▾

[Click Here](#)

+ New Contact

OR from the Contacts menu in the Navigation menu,
Click +New in the top menu

Branch App

← Show Chart + New Refresh 🔍

Current Branch Members (Branch) ▾

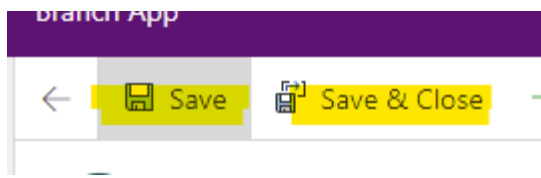
✓ Pony Club Num... ▾ First N... ↑ ▾ Last N...

[click for New Contact](#)

Add new contact

This will open the standard contact summary page.

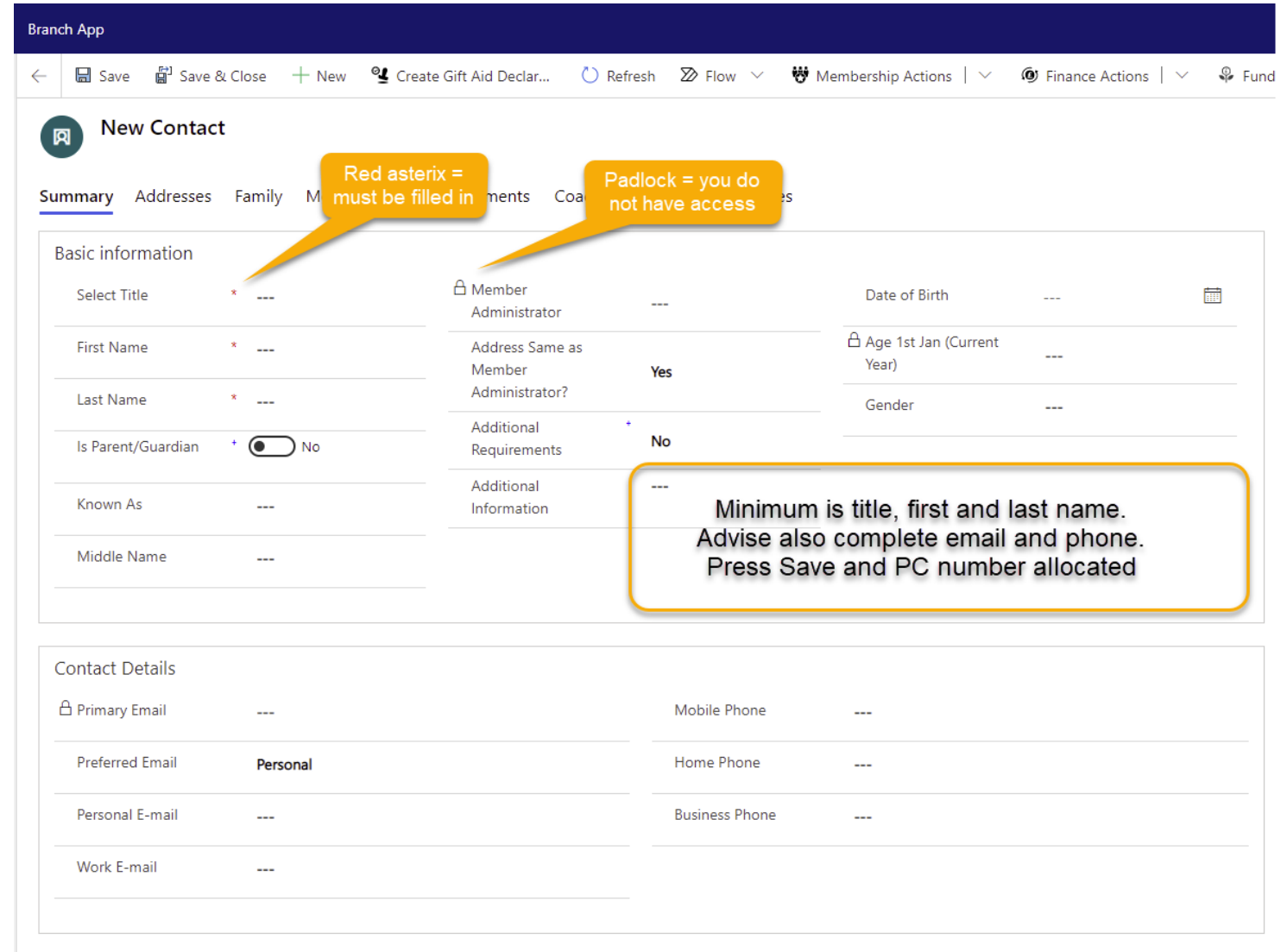
Complete required details and press Save.



A Pony Club number will be assigned and you can then add Address if required.

1003286
Pony Club Number

NB: you do not need to do this for new members that is all done by the membership team at Central Office.



Branch App

← Save Save & Close + New Create Gift Aid Declar... Refresh Flow Membership Actions Finance Actions Fund

New Contact

Summary Addresses Family M Red asterix = must be filled in Padlock = you do not have access

Basic information

Select Title *	---	Member Administrator	---	Date of Birth	---
First Name *	---	Address Same as Member Administrator?	Yes	Age 1st Jan (Current Year)	---
Last Name *	---	Additional Requirements	No	Gender	---
Is Parent/Guardian	<input type="checkbox"/> No	Additional Information	---		
Known As	---				
Middle Name	---				

Minimum is title, first and last name. Advise also complete email and phone. Press Save and PC number allocated

Contact Details

Primary Email	---	Mobile Phone	---
Preferred Email	Personal	Home Phone	---
Personal E-mail	---	Business Phone	---
Work E-mail	---		

For more detailed guidance, use the user guides
to be found on here
<https://pelham.pcuk.org/index.php>