



# PELHAM

## NEWSLETTER

Issue 29 - 14<sup>th</sup> September 2022

Dear all,

Please see below information about recent changes on Pelham.

Main updates this month are:

- Roll out of Read-only accounts
- Simplification of Gift Aid claims on the Portal
- Addition of Tetrathlon roles
- System Issues / Support

### Read-only access to Pelham

We have finally been able to set up the Read-only accounts. These accounts will allow access to VIEW all the records in Pelham, except for the financial transactions which are hidden. This account will also not be able to send emails from the system.

Log in details will be emailed to **the Branch email** address. Those Branches who have already requested a read-only account via the support portal will receive the email in the next week. If you would like to request a RO account, please raise the request here:

<https://ponyclub.atlassian.net/servicedesk/customer/portal/5/group/-1>

### Simplification of Gift Aid claims on the Portal

We have updated the way in which parents sign up to Gift Aid, if they have already done so. They will no longer need to recreate the declaration if they are happy for the previous declaration to continue.

## Individual membership applications

New memberships	Annual Cost	
<b>£37.00</b>	£37.00	<a href="#">Remove</a>
Centre: <input type="text"/>		
Membership band: Centre Membership		

*giftaid it*

**Total £37.00**

**Turn your gift of £37.00 into £46.25 at no extra cost!**

An existing Gift Aid Declaration is in place – Paul Stringer, OX7 5AN

Please select from the following options:

- Continue with current Gift Aid Declaration
- Update Gift Aid Declaration

If you would prefer to **opt out** at this stage please contact [membership@pcuk.org](mailto:membership@pcuk.org) after you have paid.

## Addition of Tetrathlon role and Certificate

A new volunteer role of “Range Conducting Officer” has been created, along with the qualification “Range Master Certificate”.

To assign a volunteer to this role, go to the Coach/Volunteer tab on their Contact record and select

Contact	Role	Age	Branch	Organisation	Start Date
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Start to type “Range” into the role and the role will be offered. Your Branch should already be populated. Add the start date and press save and close:

**New Contact Role**

General

Role:  (Dropdown: Range Conducting Officer)

Contact:

Email Address:

Age:

Branch:

Centre/Organisation:

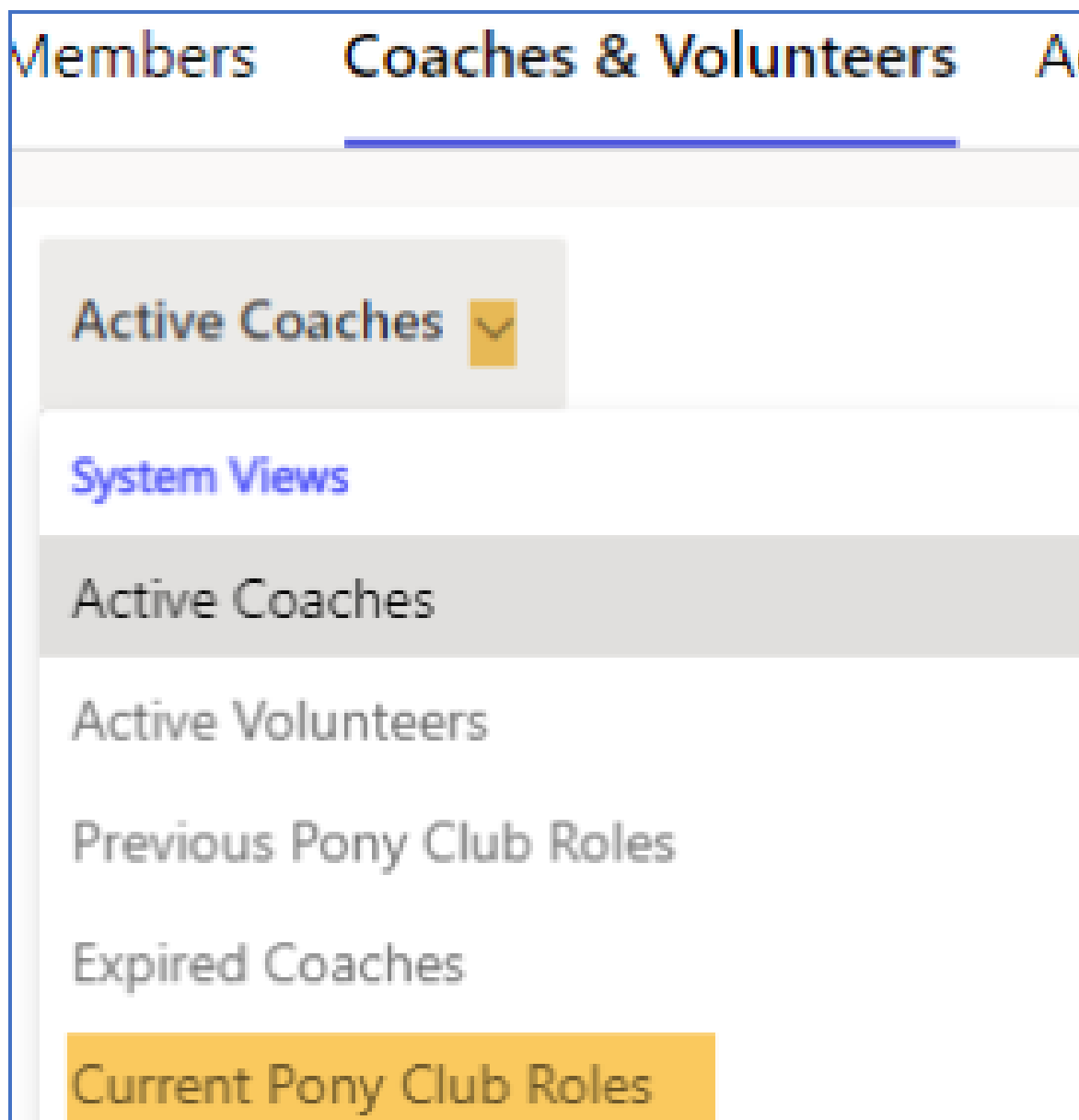
Start Date:

End Date:

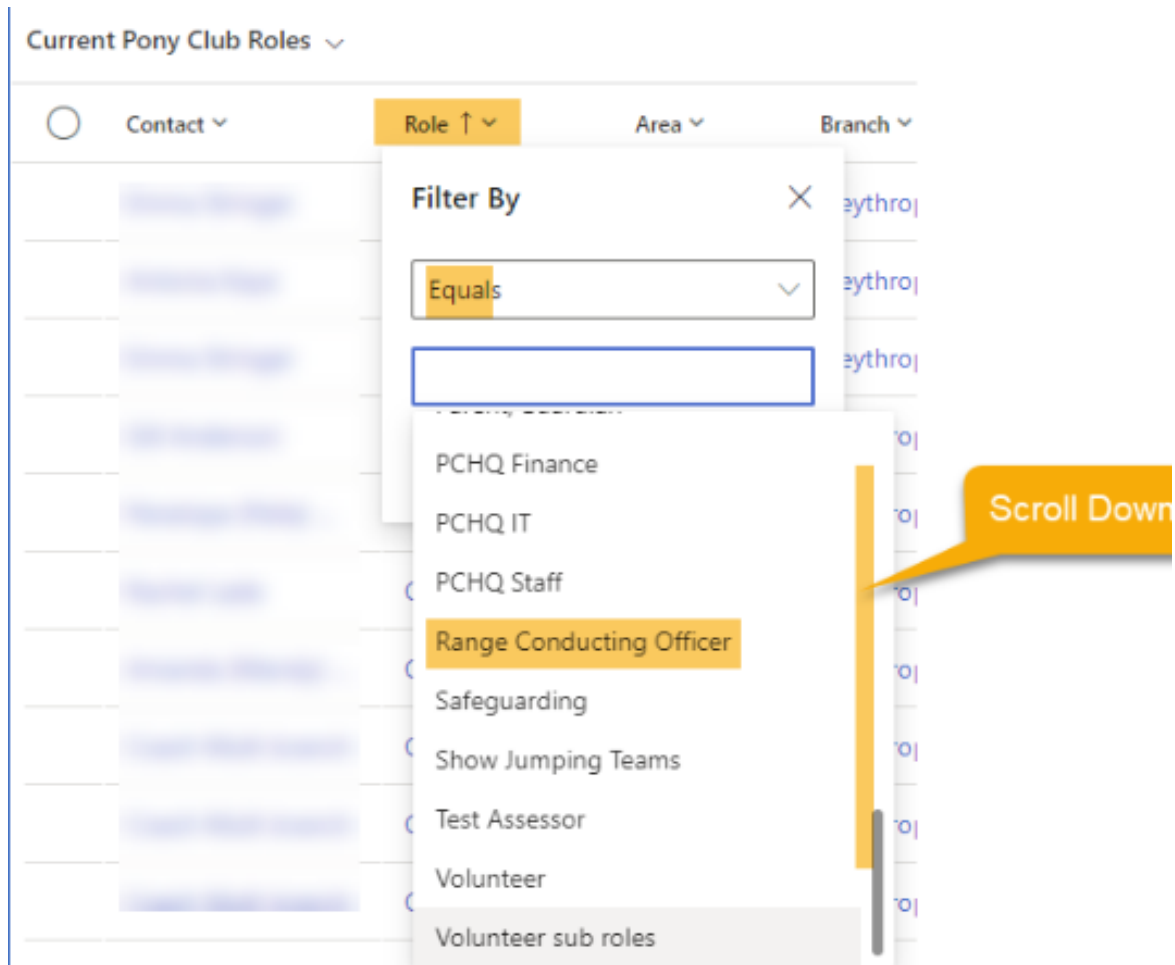
Reason for leaving:

You can then add the Range Master Certificate as a standard achievement, on the Achievement tab of the person.

To get a list of volunteers who are Range Conducting Officers once you have set them up, go to “Coaches and Volunteers” on the Branch page, and select “Current Pony Club Roles” and search for “Range Conducting Officer”:



The screenshot shows a navigation menu with three tabs: "Members", "Coaches & Volunteers", and "A". The "Coaches & Volunteers" tab is selected and highlighted with a blue underline. Below the tabs, there is a dropdown menu for "Active Coaches" with a yellow arrow icon. Underneath, there is a section titled "System Views" in blue text. Below "System Views", there is a list of options: "Active Coaches", "Active Volunteers", "Previous Pony Club Roles", "Expired Coaches", and "Current Pony Club Roles". The "Current Pony Club Roles" option is highlighted with a yellow background.



# Support

Please remember to use the project site with all of the user guides and updated videos:

[PELHAM User Guides](#)

Please report any issues or questions via the PELHAM support hub:

[PELHAM Support Hub](#)

NB when reporting issues, please do provide as much information as possible, including branch name, name/number of the contact/member with whom the issues is associated.



The Pony Club

The Pony Club, Lowlands Equestrian Centre, Old Warwick Road, Warwick, CV35 7AX

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