

# **FIRST** SPORTS

## **GMS** **Creating Membership Schemes**

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## Introduction

Membership Schemes are the foundation for the entire system, as this controls and helps determine your members, status of your members, amount paid and the total of members.

Administrators (level 2 and 5) at the club can take payments for memberships by cash, cheque or other. If the club have set up for online payments, they can process using card or direct debit where members can login to GMS and purchase a membership.

Clubs can now use multiple bank accounts to receive settled funds for each bank account type set up that has memberships or products assigned with a Budget Code. Where a membership or a product is not linked to a Budget Code or Product Category, the online payments received will be settled to the club's default bank account. Please see the other guides for further information on Budget Codes and Products.

### 1. Creating a New Membership Scheme

Creating a Membership Scheme is set up through the Finance tile or Inventory Module.



Select Membership Schemes and any existing Active schemes will display.

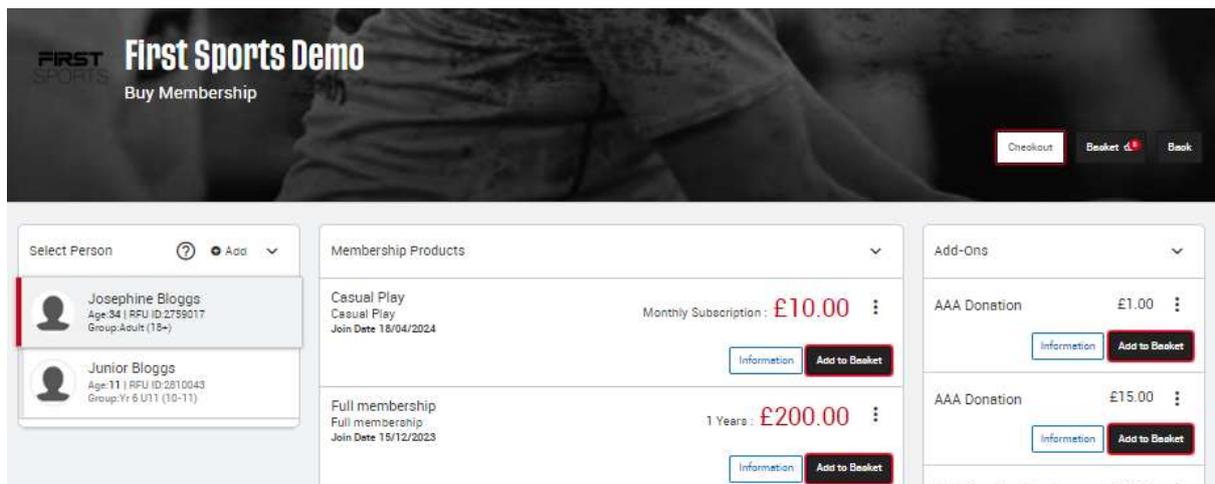


Select **New** top right and enter the Membership Details, Membership Options, Membership Fees, Instalments and Rules/Budget Codes (if applicable) etc, and Save.

<p><b>Membership Details</b></p> <p>VENDOR: First Sports Demo <span>✕</span></p> <p>NAME (0/200): <input type="text"/></p> <p>DESCRIPTION: <input type="text"/></p> <p>GATE ACCESS CODE: <input type="text"/> BUDGET CODE: <input type="text"/> <input type="button" value="Search"/></p>	<p><b>Membership Options</b></p> <p>SCHEME: Anniversary   TYPE: Adult   CATEGORY: <input type="text"/></p> <p>SCHEME START: 15/11/2022   SCHEME APPLICATION START: 15/11/2022</p> <p>STATUS: Active   CODE: MEM0000695   TAX TYPE: Value Added Tax   SORT ORDER: <input type="text"/></p> <p>AVAILABLE FOR ONLINE PURCHASE: No   IS IN STOCK: Yes   STATUS ON PURCHASE: Active</p> <p>DURATION: Years   UNIT: 1</p>
<p><b>Purchase Window</b></p> <p>PRE-PURCHASE WINDOW: 1 Month</p> <p><small>This pre purchase period applies to next season</small></p> <p>END PURCHASE WINDOW: None</p> <p><small>This period applies to the current season</small></p>	<p><b>Membership Fees</b></p> <p>JOINING FEE: <input type="text"/>   UNIT PRICE: 0   CURRENCY: GBP</p> <p><b>Instalments</b></p> <p>NO OF PAYMENTS: 1</p> <p><b>Rules</b></p> <p>No rules configured <span style="float: right;">+Add</span></p>

Once all the details have been saved and made available for online purchase, if the club have a website created via GMS these schemes will appear under **Memberships** on the website and appear for everyone on GMS. If set to No, only club admins will be able to view these memberships.





## 2. Membership Scheme Details

### Membership Details

- **VENDOR** – default to club.
- **NAME** – Scheme name e.g. Senior Adult Playing.
- **DESCRIPTION** – What the is scheme is about/for.
- **GATE ACCESS CODE** – not applicable.
- **BUDGET CODE** - For internal club use if using multiple bank accounts types. Additional field when exporting data.

### Membership Options

- **SCHEME – Anniversary:** A membership lasts for 1 year from that date e.g. scheme starts on 1<sup>st</sup> September 2023, it will run until 1<sup>st</sup> September 2024.  
**Join Date:** A membership lasts for 1 year and from that date e.g. joins on 4<sup>th</sup> October 2023, it will run until 4<sup>th</sup> October 2024.  
**Monthly subscriptions:** A membership that is ongoing, recurring payments will be taken each month without having to renew. A monthly subscription will only end if the member cancels their DD mandate which will move them into a suspended status, or the clubs decide to stop that monthly subscription running.

- **TYPE**– Adult, Junior, Individual. This field is mandatory and will help the club identify those memberships and for any rules being applied.
- **CATEGORY** – Playing, Social, Guardian. This isn't mandatory but can help clubs breakdown each category the memberships fall into on reporting.
- **SCHEME START** – When the membership starts e.g. 01/09/2023
- **SCHEME APPLICATION START** – When the membership can be purchased from (same or before start). This may affect the display on a club website, for example:  
Today's date: 02/06/2023  
Scheme Application Start date: 01/07/2023  
The membership scheme will not display on the website until 01/07/2023 as this is when it can be purchased from.
- **STATUS**– Active (current)/Inactive (not used)
- **CODE** – Default. For internal club use.
- **TAX TYPE** – For internal club use. This will be shown on reporting under Product Orders in Finance and within the order summary itself.
- **AVAILABLE FOR ONLINE PURCHASE** – **No**: Club admins only.  
**Yes**: View on FSI club websites and available for everyone to view on GMS.
- **IN STOCK** – Default as Yes, not required for memberships.
- **STATUS ON PURCHASE** – **Active**: Automatically goes to the membership list once the membership scheme has started.  
**Pending**: The individual appears in pending grid. This may be set to memberships that need further approval before updating to Active e.g. student memberships may have a discount, set status to pending to check those individuals have a student card for them to 1. Have that membership and 2. Have any discount applied.  
***If a membership has been purchased before its start date it will automatically go to a Scheduled status, once the scheme has started this will update to Active.***
- **DURATION** – Is the membership yearly, monthly or lifetime.
- **UNIT** – 1 year, can be set to more meaning that the membership will be applicable for longer.

## Membership Fees

- **JOINING FEE** – An additional joining fee to the membership e.g. membership is £100.00 but there is a joining fee of £10.00.
- **UNIT PRICE** – How much the membership will cost. If created a monthly subscription scheme then insert the price that it will cost a member each month, not the full amount.
- **CURRENCY** – Automatically set as GBP.

## Instalments

The Instalments field will not display if the SCHEME is set to monthly subscriptions. This is only applicable for anniversary and join date schemes.

- **No. OF PAYMENTS** – 1 Payment is to pay all in one go (this will have the option of card, DD, cash etc). Or set up for more than 1 payment, monthly instalments (option of DD).

If the no. of payments is greater than 1 the following will display to add:

- **ALLOW SINGLE PAYMENT** – If you want the members to have the choice of paying by instalments and one off payments, this field will need to be set as Yes. Leave set as No if you wish for the membership to be paid by instalments only.

**Note: if there is a premium for DD memberships these will need to be created separately.**

- **PAYMENT TERM** - This will display if number of payments is greater than 1.

**Rollup:** bundle any missed months in the first payment.

**ProRata:** If there are not enough months left in the membership the payments will pro rata over the remaining months, for example: membership runs for 1 year from 1<sup>st</sup> September, it is £200.00 with 10 x £20 instalments. If the member joins on 1<sup>st</sup> January, then the £200.00 will pro rata over 8 payments as that is the remaining months left of that membership.

This is aimed at any members purchasing after the scheme start date.

- **FIRST PAYMENT (£)** – How much the first payment for instalments will be, can take more or less in the first month or spread payments out evenly.
- **PAYMENT PLAN** – When the no. of payments and first payment is entered/adjusted a payment plan will display to show what the first payment amount will be and the remaining payment amounts.

### Payment Plan

No. of Payments		Payment(s)
1	@	10.00
11	@	10.00

## Pre Purchase

- **PRE-PURCHASE WINDOW** – The pre purchase window applies to next season. If a member has purchased this membership before and wishes to purchase again for the new season this function gives the club the ability of when they can purchase before the start of the scheme. E.g. Scheme starts on 01/09/2023, set as 3 months so members can purchase on 01/06/2023. This can be changed to 1, 2, 3, 4, 5 or 6 months before start date. There is also the option of none if you wish for the membership to not be purchased until it's intended start date. When a member purchases the membership before the start date the membership status will be 'scheduled' and will move into the active status once that start date hits.

***Note: if creating a new membership scheme for the upcoming season e.g. 2024/25 applying a pre-purchase won't come into effect until the following season e.g. 2025/26. A new membership scheme will apply its scheme application start date.***

- **END PURCHASE WINDOW** – Whereas, the end purchase window is set for memberships to stop displaying for purchase for the current season. This can be set to none or 1,2,3,4,5,6 months from when the membership is due to lapse. For example: A membership runs from 1<sup>st</sup> September to 1<sup>st</sup> September, set this field as 2 months the membership will no longer be available from 1<sup>st</sup> July. This is to allow members to not purchase for only x amount of months of that current season. However, this can be set to none if the club wish for the membership to run throughout until the new season.

## Rules

Rules can be applied to memberships e.g. gender or age specific, available for certain role groups or discounts if multiple are to be purchased. Further information below on what each rule does and how they can be handled.

## 3. Prices

Once the membership scheme has been saved, and you wish to edit e.g. the Prices field will be displayed.

New prices for the membership can be added.

These can give an effective to and from date on how long that price will be on offer at the club. There is also a **Allow Override** which will enable admins to change a price when it comes to paying an order. To create a new price point or allow override, select the +Add.

Prices



Price		From	To	Allow Override
£200.00		10/02/2021		

FS Senior Adult Playing  
 Price Edit Save Close

**Price**

UNIT PRICE

CURRENCY

EFFECTIVE FROM

EFFECTIVE TO

Price Override

**Payment Plan**

No. of Payments		Payment(s)
1	@	20.14
9	@	25.54

There is also the option to edit the current price by selecting the pencil icon, or deleted by clicking the x.

Prices



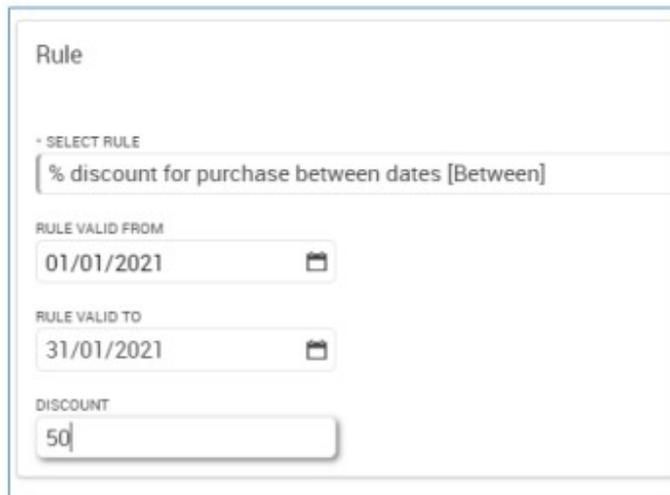
Price		From	To	Allow Override
£200.00		10/02/2021		

## 4. Rules

Product Rules can be applied to membership schemes to limit who can and cannot purchase a membership.

### **% discount for purchase between date [Between]**

Enter dates in which the discount would be applicable from and to  
DISCOUNT = percentage discounted from original price.



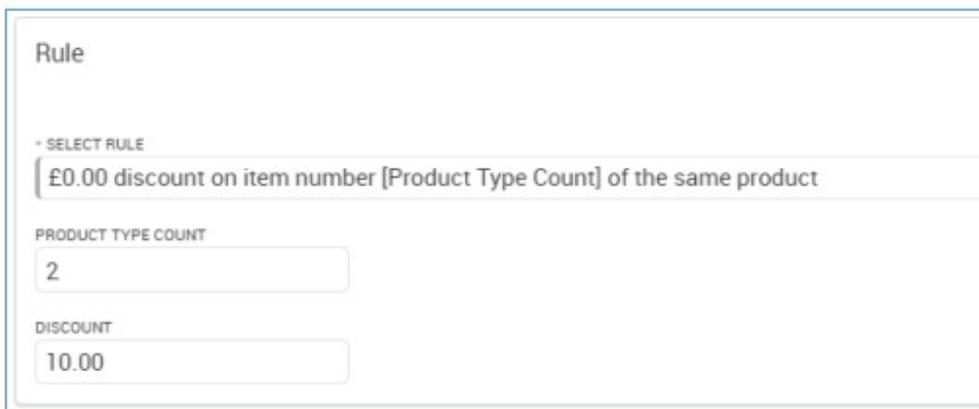
The screenshot shows a form titled 'Rule' with the following fields:

- SELECT RULE:** A dropdown menu with the selected option: "% discount for purchase between dates [Between]".
- RULE VALID FROM:** A date input field containing "01/01/2021" with a calendar icon.
- RULE VALID TO:** A date input field containing "31/01/2021" with a calendar icon.
- DISCOUNT:** A text input field containing "50".

### **£0.00 discount on each qualifying item where you have [Product Type Count] or more of the same product**

PRODUCT TYPE COUNT = from the number the discount applies from e.g. 2, so when the same membership is added to the order it will be discounted the DISCOUNT entered. However, if a third, fourth etc is added they will also be discounted.

DISCOUNT = amount discounted e.g. 10.00, £10 will be discounted each time.



The screenshot shows a form titled 'Rule' with the following fields:

- SELECT RULE:** A dropdown menu with the selected option: "£0.00 discount on item number [Product Type Count] of the same product".
- PRODUCT TYPE COUNT:** A text input field containing "2".
- DISCOUNT:** A text input field containing "10.00".

**£0.00 discount on each qualifying item where you have [Type And Category Count] or more of the same type and category**

TYPE AND CATEGORY COUNT = from the number the discount applies from e.g. 2, so when a membership that has the same TYPE (i.e. Adult) and CATEGORY (i.e. SOCIAL) is added to the order it will be discounted the DISCOUNT entered. However, if a third, fourth etc is added they will also be discounted.

DISCOUNT = amount discounted e.g. 10.00, £10 will be discounted each time.



The screenshot shows a 'Rule' configuration form. At the top, it says 'Rule'. Below that is a dropdown menu labeled '- SELECT RULE' with the selected option being '£0.00 discount on item number [Type And Category Count] of the same membership type and category'. Underneath, there are three input fields: 'TYPE AND CATEGORY COUNT' with the value '2', 'DISCOUNT' with the value '10.00', and a third empty field.

**£0.00 discount on individuals that are older than [Age more than]**

AGE MORE THAN = e.g. 17

DISCOUNT = 20.00

Those individuals that are 18+ will be discounted £20.

**£0.00 discount on individuals that are younger than [Age less than]**

AGE LESS THAN = e.g. 18

DISCOUNT = 20.00

Those individuals that are under 18 will be discounted £20.

**£0.00 discount on item number [Product Type Count] of the same product**

PRODUCT TYPE COUNT = the number the discount applies from e.g. 2, so when the same membership is added to the order it will be discounted the DISCOUNT entered. If more of the same membership is added to that order they will not be discounted, it is only on the item number.

DISCOUNT = amount discounted e.g. 10.00 on that item number

**£0.00 discount on each qualifying item where you have [Type And Category Count] of the same product**

PRODUCT TYPE COUNT = the number the discount applies from e.g. 2, so when a membership that has the same TYPE (i.e. Adult) and CATEGORY (i.e. SOCIAL) is added to the order it will be discounted the DISCOUNT entered. If more of the same membership type and category is added to that order they will not be discounted, it is only on the item number.

DISCOUNT = amount discounted e.g. 10.00 on that item number

**0% percentage discount on individuals that have a cashless balance greater than [Balance more than]**

This is applicable for POS users.

**0% percentage discount when paying cashless**

This is applicable for POS users.

**0% percentage discount when paying cashless and is an active member**

This is applicable for POS users.

**0.00% discount when purchaser has any active membership**

IS MEMBER = yes/no

DISCOUNT = percentage discount they will receive if they are or are not a member.

**0.00% discount when purchase has specific membership**

SELECT MEMBERSHIP = this is the membership in which they will receive a discount on when purchasing.

DISCOUNT = amount discounted e.g. 10.00, £10 will be discounted from total.

**Current Age of Individual**

AGE = restrict the age of who can see this membership within the list of options e.g. 12, those who have the current age of 12 on GMS will on see that specific membership.

**Discount of £0.00 for men's leagues, start from level [League level]**

LEAGUE LEVEL = use drop down to select league level discount will be applied too.

DISCOUNT = the amount that will discounted from the original price.

**Discount of £0.00 for women's leagues, start from level [League level]**

LEAGUE LEVEL = use drop down to select league level discount will be applied too.

DISCOUNT = the amount that will discounted from the original price.

**Discount when purchased with membership**

SELECT MEMBERSHIP = select from the search which membership they will receive a discount when purchased with. For example: if I add this rule to a junior membership but SELECT MEMBERSHIP is social, I will receive a discount when I purchase the junior and social membership together in one order.

DISCOUNT = amount discounted from the original price.

<b>Rule</b>	
• SELECT RULE	Discount when purchased with membership £0.00
• SELECT MEMBERSHIP	Adult Guardian Membership
DISCOUNT	30.00

**Display (not) Required Add-ons by**

Only applicable if you have any additional add on products.

**Dual membership is (not) allowed**

DUAL MEMBERSHIP ALLOWED = yes/no

Doesn't have to be added but this is to stop people having more than one membership if they do not need too.

**Families with 1 adult and up to children maximum fee 0.00**

CHILD COUNT = number of children applicable to e.g. 3

MAXIMUM FEE = capped amount

When one adult purchases their adult (type) membership and 3 children's membership (junior) the price in the order will be capped to that MAXIMUM FEE.

<b>Rule</b>	
• SELECT RULE	Families with 1 adult and up to children maximum fee 0.00
CHILD COUNT	2
MAXIMUM FEE	120.00

**Families with 2 adults and up to children maximum fee 0.00**

CHILD COUNT = number of children applicable to e.g. 3

MAXIMUM FEE = capped amount

When two adult purchases their adult (type) membership and 3 children's membership (junior) the price in the order will be capped to that MAXIMUM FEE.

Rule

+ SELECT RULE  
Families with 2 adults and up to children maximum fee 0.00

CHILD COUNT  
2

MAXIMUM FEE  
144.00

**Individual can (not) have outstanding orders**

OUTSTANDING ORDERS PERMITTED = yes/no

If a member creates an order and does not pay for it, leaving the order in pending, they will not be able to purchase another membership when set to no.

**Individual must (not) be an active member**

IS MEMBER = yes/no

May want to restrict to new members. Setting no means if they are not an active member they can purchase this. If yes, then they cannot purchase another membership.

**Individual must (not) have an active cashless card**

Applies to POS users.

**Individual must (not) have an emergency contact**

HAS EMERGENCY CONTACT = yes/no

This is to restrict who can see the membership, whether they have an emergency contact or not. All under 18's should be linked to an adult with an emergency contact.

**Individual must be at least [Age] years old**

This means that if you set the age to 18, then those who are 18 and above would be able to view this membership.

**Individual must be at least [Age] years old at the start of the season**

If you set the age to 18, then those who are 18 and above from the start of the season would be able to view this membership.

**Individual must be less than [Age] years old**

Individual needs to be under the age stated on rule e.g. Age – 18, this means only individuals under the age of 18 can see and purchase that membership (17 and below).

**Individual must be less than [Age] years old at the start of the season**

Individual needs to be under the age stated on rule e.g. Age – 18, this means only individuals under the age of 18 at the start of the season can see and purchase that membership (17 and below).

**Individual must be more than [Age] years old**

Individual needs to be over the age stated on rule e.g. Age – 18, this means only individuals over the age of 18 can see and purchase that membership (19+)

**Individual must be more than [Age] years old at the start of the season**

Individual needs to be over the age stated on rule e.g. Age – 18, this means only individuals over the age of 18 at the start of the season can see and purchase that membership (19+)

**Individual must have a role**

STRONG FIELD VALUE = yes/no

Yes covers all roles at the club, whereas no means those without a role at the club.

**Individual must have one of the following roles: [Role List]**

Applying and selecting a role or roles, allows only that role or roles to view and purchase that membership. E.g. Team Manager apply 'individual must have one of the following roles' and select Team Manager. Only the role of Team Manager will see and can buy that membership.

**Must (not) be first membership at the club**

ALLOW AS FIRST MEMBERSHIP ONLY = yes/no

This is a Yes or No rule and mainly for first time memberships.

When applying Yes as 'allow as first membership only' indicates that they need to purchase the membership before others. E.g. New Joiner Membership

Selecting No indicates that the membership cannot be the individuals first membership.

**Only available to [Gender] gender individuals**

You can apply which gender group can purchase the membership e.g. Female Playing membership add rule and apply Female.

**Only visible to people with the following security: [Role]**

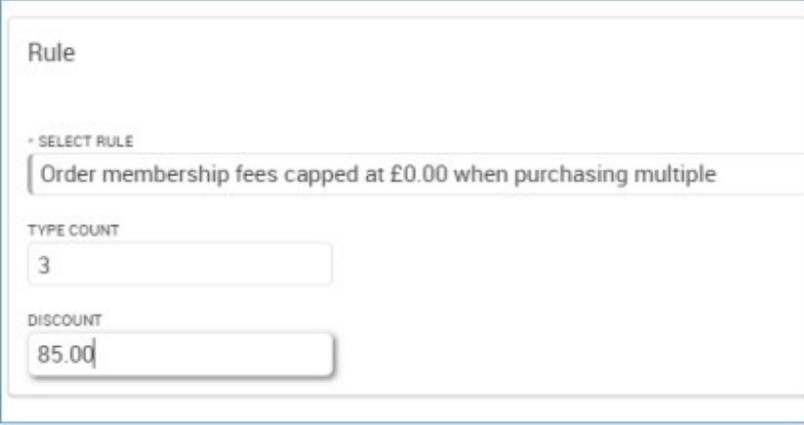
Like 'must have one of the following roles' rule, this for levels that have specific securities and permissions at the club e.g. Level 5. Selecting the permission of Level 5 and applying the rule means only the data officer at the club can view and purchase the membership.

**Order membership fees capped at £0.00 when purchasing multiple**

TYPE COUNT = 3, more than 3 purchased.

DISCOUNT = 250.00, this will be the price of the order overall. Capping the amount.

So, if this was applied to a social membership and 3 or more were purchased in the same order it would be capped at £250



Rule

+ SELECT RULE

Order membership fees capped at £0.00 when purchasing multiple

TYPE COUNT

3

DISCOUNT

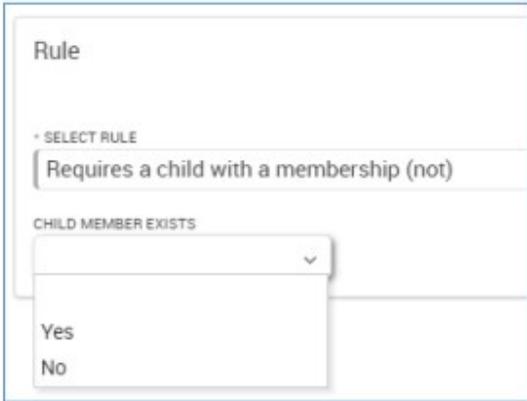
85.00

**Requires a child with a membership (not)**

Applied to more adult memberships.

If Yes, then to purchase the adult membership a child needs to purchase a membership before.

If No, then the adult membership can be purchased without a child membership.



Rule

+ SELECT RULE

Requires a child with a membership (not)

CHILD MEMBER EXISTS

Yes

No

**Requires a related guardian or parent membership (not)**

This is applied more to youth/junior memberships.

If Yes, then to purchase the youth membership a guardian/parent needs to purchase a membership before.

If No, then youth membership can be purchased without a parent/guardian membership.

**Subscription pro-rata discount or partial first month (number of days in month / [Number of instalments])**

This rule is to be applied to monthly subscription memberships.

If a monthly subscription is purchased within 10 days before end of month then member will be charged for 2 months i.e. the month they have created the order and the following month. For

example: purchase on 26/06/2020 they are purchasing for the rest of June and July, next order will be for August.

Applying this rule will pro rata the 1<sup>st</sup> month and leaving the full amount for the 2<sup>nd</sup> month.

NUMBER OF INSTALMENTS to 31 (31 days in month – this will still calculate if less days in the month)

This will also apply a pro rata discount when purchased part way through the month, e.g. if they purchase on 5th of the month the order will pro rata as they have not paid for a full month.

**This product is (not) excluded from all discounts**

This rule means that other discount rules applied to the other memberships will not be conflicted with this one.

Set as Yes = no confliction of other discounts

Set as No = All discounts applied to this rule and others will mean that further discounts may be added but not required.