



**GMS**  
**Adding Contacts and relationships**  
**Individually and Bulk Upload**

**Irish Rugby Football Union**

10-12 Lansdowne Road | Ballsbridge | Dublin 4 | D04 F720

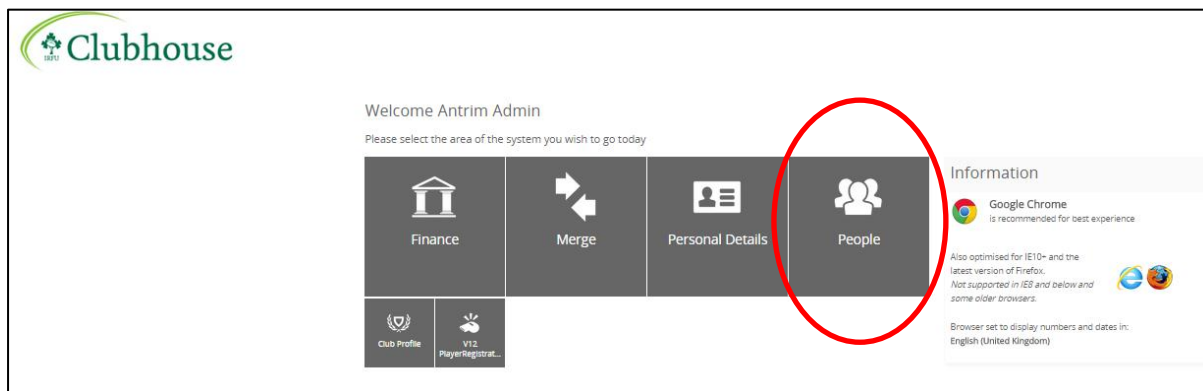
**T** +353 01 6473800 | **F** +353 01 6473801

[www.irishrugby.com](http://www.irishrugby.com)   

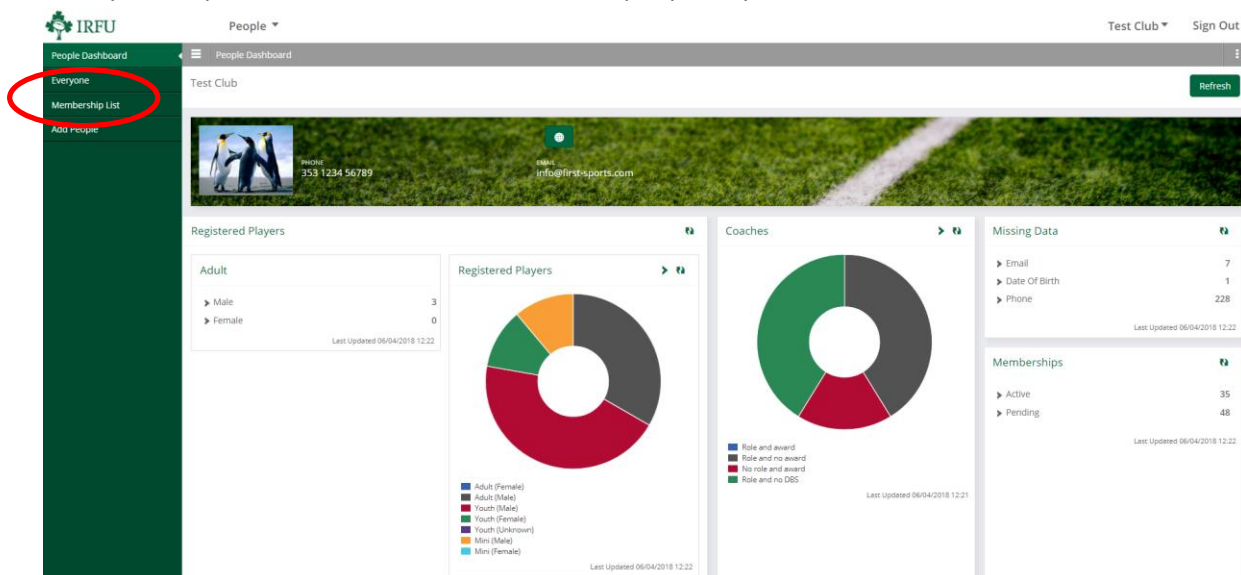


## Introduction

To create a new contacts, the user must select **People**



Here you are presented with a dashboard of the people in your club:



There are two options to select, “Everyone” and “Membership List”

**Everyone** – Is a combined list of ALL individuals that have ever been involved with the club. This is both old and new data, current and past members.

**Membership List** – By default it displays a list of all individuals with a current (Active) membership at the club, however it is possible to change the view to include old memberships (inactive, pending or archived) (NOTE: When a membership expires, the membership status changes from Active to Inactive, until such time that a new/renewal of membership is assigned to the individual)

### Irish Rugby Football Union

10-12 Lansdowne Road | Ballsbridge | Dublin 4 | D04 F720

T +353 01 6473800 | F +353 01 6473801

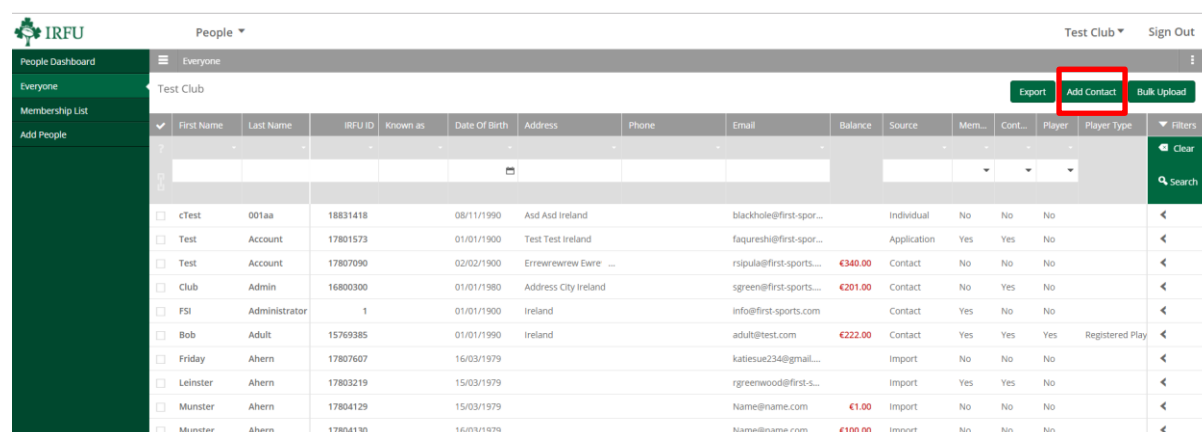
www.irishrugby.com



## Entering Contacts individually

To add contacts individually

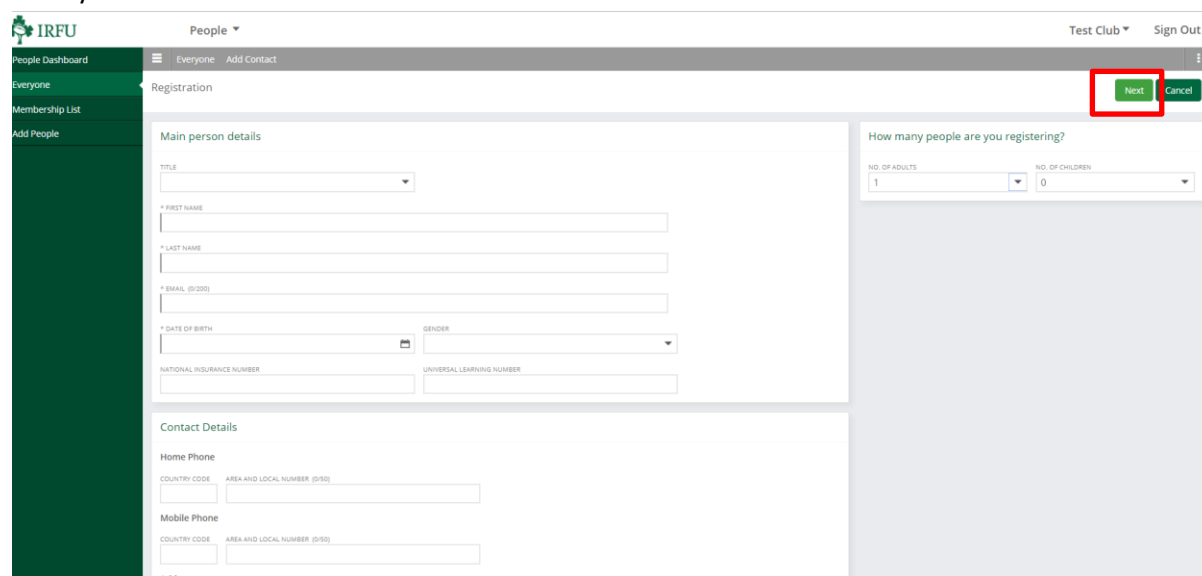
Click People > Everyone > Add Contact



The screenshot shows the IRFU People Dashboard. On the left is a sidebar with 'People Dashboard', 'Everyone', 'Membership List', and 'Add People'. The main area shows a list of contacts with columns: First Name, Last Name, IRFU ID, Known as, Date Of Birth, Address, Phone, Email, Balance, Source, Mem., Cont., Player, and Player Type. A table of contacts is displayed below. The 'Add Contact' button is highlighted with a red box.

First Name	Last Name	IRFU ID	Known as	Date Of Birth	Address	Phone	Email	Balance	Source	Mem.	Cont.	Player	Player Type
cTest	001aa	18831418		08/11/1990	Asd Asd Ireland		blackhole@first-spor...		Individual	No	No	No	
Test	Account	17801573		01/01/1900	Test Test Ireland		faqureshi@first-spor...		Application	Yes	Yes	No	
Test	Account	17807090		02/02/1900	Errewewrew Ewre ...		rsipula@first-sports...	€340.00	Contact	No	No	No	
Club	Admin	16800300		01/01/1980	Address City Ireland		sgreen@first-sports...	€201.00	Contact	No	Yes	No	
FSI	Administrator	1		01/01/1900	Ireland		info@first-sports.com		Contact	Yes	No	No	
Bob	Adult	15769385		01/01/1990	Ireland		adult@test.com	€222.00	Contact	Yes	Yes	Yes	Registered Play
Friday	Ahern	17807607		16/03/1979			katiesue234@gmail...		Import	No	No	No	
Leinster	Ahern	17803219		15/03/1979			rgreenwood@first-s...		Import	Yes	Yes	No	
Munster	Ahern	17804129		15/03/1979			Name@name.com	€1.00	Import	No	No	No	
Munster	Ahern	17804130		16/03/1979			Name@name.com	€100.00	Import	No	No	No	

Here you can add the contacts details



The screenshot shows the IRFU Registration form. The form is divided into two main sections: 'Main person details' and 'Contact Details'. The 'Main person details' section includes fields for Title, First Name, Last Name, Email, Date of Birth, Gender, National Insurance Number, and Universal Learning Number. The 'Contact Details' section includes fields for Home Phone and Mobile Phone. A sidebar on the left contains 'People Dashboard', 'Everyone', 'Add Contact', 'Registration', 'Membership List', and 'Add People'. The 'Next' button is highlighted with a red box.

Once entered click 'Next' – then on the next page you will be presented with the details you have just entered; click 'Confirm' to save.

### Irish Rugby Football Union

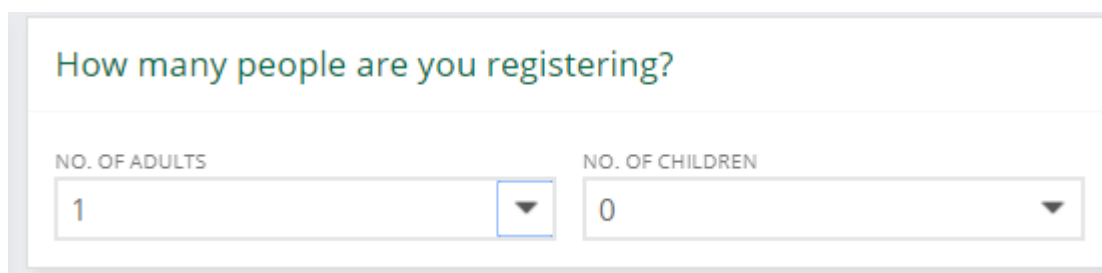
10-12 Lansdowne Road | Ballsbridge | Dublin 4 | D04 F720

T +353 01 6473800 | F +353 01 6473801

www.irishrugby.com



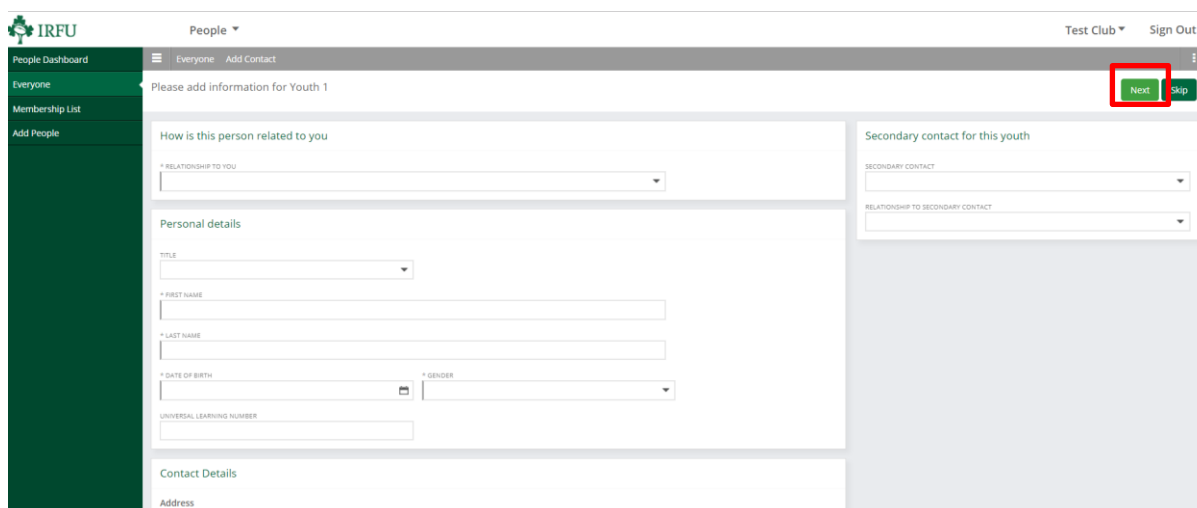
The contact page also gives you the option to add a family together – by adding additional members to ‘How many people are you registering?’



The screenshot shows a form titled "How many people are you registering?". It contains two dropdown menus. The first is labeled "NO. OF ADULTS" and has the number "1" selected. The second is labeled "NO. OF CHILDREN" and has the number "0" selected. Both dropdowns have a small downward arrow icon on the right side.

When you select to add more here you will be presented with the following page after entering in the first contact.

You can here enter the relationship of the additional contacts. (i.e. child)



The screenshot shows the "Add People" page in the IRFU system. The page has a dark green sidebar on the left with the IRFU logo and navigation links: "People Dashboard", "Everyone", "Membership List", and "Add People". The main content area is titled "People" and "Please add information for Youth 1". It contains two main sections: "How is this person related to you" and "Personal details". The "How is this person related to you" section has a dropdown menu for "RELATIONSHIP TO YOU". The "Personal details" section has fields for "TITLE", "FIRST NAME", "LAST NAME", "DATE OF BIRTH", "GENDER", and "UNIVERSAL LEARNING NUMBER". To the right of these fields is a section titled "Secondary contact for this youth" with dropdowns for "SECONDARY CONTACT" and "RELATIONSHIP TO SECONDARY CONTACT". At the top right of the main content area, there are two buttons: "Next" (highlighted with a red box) and "Skip".

Once complete select next to additional contacts.

Once complete enter skip and then you will be asked to confirm the contacts you have entered.

When you add contacts whether individually or through the bulk upload they will now receive a welcome email with their login details where they can view their profile and purchase memberships etc.

#### Irish Rugby Football Union

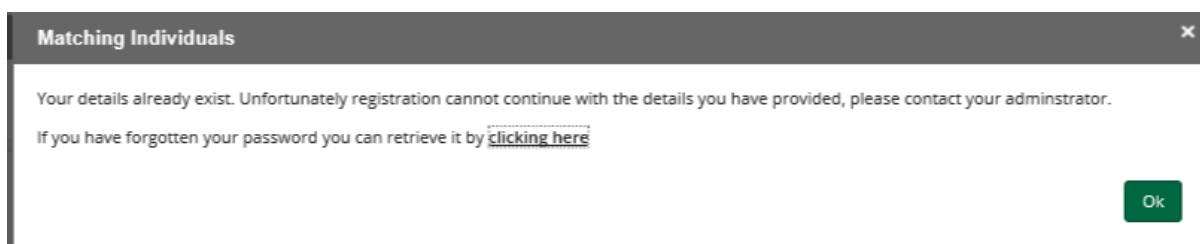
10-12 Lansdowne Road | Ballsbridge | Dublin 4 | D04 F720

T +353 01 6473800 | F +353 01 6473801

[www.irishrugby.com](http://www.irishrugby.com)



If you enter in a contact that already exists in the system (same Name, email and DOB) you will receive a notification that the user already exists.



## Entering Contacts by bulk upload

The bulk upload tool is a facility that enables Clubs and Branches to upload a group of individuals at the organisation on mass. Via a template spreadsheet the club can choose to download and populate the document with the individuals they want to upload. (Please be aware that there are not currently restrictions on total numbers, but the greater the number, the longer it will take to upload. As an example 1000 individuals could take up to 10 minutes to upload.)

The spreadsheet that is populated and uploaded is a standard template. It is only ever possible to upload the data listed in that spreadsheet, if additional columns or data is included, this will be discarded and the upload will fail.

Currently the data that can be uploaded is as follows:

- Title
- First Name
- Last Name
- Date of Birth
- Number
- Address 1
- City
- Post Code
- Tel Home/mobile/Work/Fax/Preferred
- Email

Please bear in mind the individuals being uploaded will not hold any status at the club at that point of being uploaded, they will not have a membership, a role or be a registered player. If they are in fact one of the above, then these statuses will need to be associated to them after the upload. i.e. once uploaded the individual can then be registered as a player

### Irish Rugby Football Union

10-12 Lansdowne Road | Ballsbridge | Dublin 4 | D04 F720

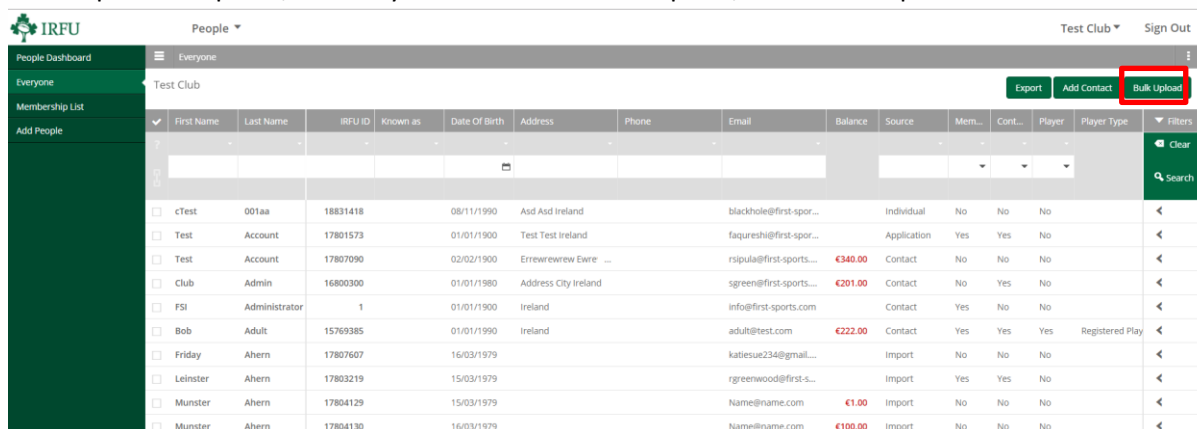
T +353 01 6473800 | F +353 01 6473801

[www.irishrugby.com](http://www.irishrugby.com)



Select People > Everyone

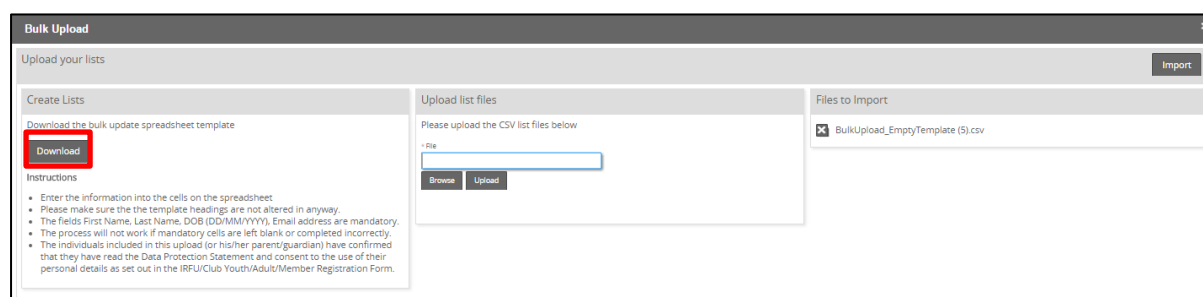
To complete an upload, via Everyone or the Membership List, select Bulk Upload



The screenshot shows the IRFU People Dashboard. On the left sidebar, 'Everyone' is selected. In the top right corner, the 'Bulk Upload' button is highlighted with a red box. The main table displays a list of people with columns for First Name, Last Name, IRFU ID, Known as, Date of Birth, Address, Phone, Email, Balance, Source, Mem..., Cont..., Player, and Player Type. The table is filtered for 'Test Club'.

First Name	Last Name	IRFU ID	Known as	Date Of Birth	Address	Phone	Email	Balance	Source	Mem...	Cont...	Player	Player Type
cTest	001aa	18831418		08/11/1990	Asd Asd Ireland		blackhole@first-spor...		Individual	No	No	No	
Test	Account	17801573		01/01/1900	Test Test Ireland		faqueshi@first-spor...		Application	Yes	Yes	No	
Test	Account	17807090		02/02/1900	Ernewrewew Ewre ...		rsipula@first-sports...	€340.00	Contact	No	No	No	
Club	Admin	16800300		01/01/1980	Address City Ireland		sgreen@first-sports...	€201.00	Contact	No	Yes	No	
FSI	Administrator	1		01/01/1900	Ireland		info@first-sports.com		Contact	Yes	No	No	
Bob	Adult	15769385		01/01/1990	Ireland		adult@test.com	€222.00	Contact	Yes	Yes	Yes	Registered Play
Friday	Ahern	17807607		16/03/1979			katiesue234@gmail...		Import	No	No	No	
Leinster	Ahern	17803219		15/03/1979			rgreenwood@first-s...		Import	Yes	Yes	No	
Munster	Ahern	17804129		15/03/1979			Name@name.com	€1.00	Import	No	No	No	
Munster	Ahern	17804130		16/03/1979			Name@name.com	€100.00	Import	No	No	No	

Download the upload template



The screenshot shows the 'Bulk Upload' form. On the left, under 'Create Lists', the 'Download' button is highlighted with a red box. The form includes instructions for uploading CSV files and a list of files to import.

**Create Lists**

Download the bulk update spreadsheet template

**Download**

**Instructions**

- Enter the information into the cells on the spreadsheet.
- Please make sure the template headings are not altered in anyway.
- The fields First Name, Last Name, DOB (DD/MM/YYYY), Email address are mandatory.
- The process will not work if mandatory cells are left blank or completed incorrectly.
- The individuals included in this upload (or higher parent/guardian) have confirmed that they have read the Data Protection Statement and consent to the use of their personal details as set out in the IRFU/Club Youth/Adult/Member Registration Form.

**Upload list files**

Please upload the CSV list files below

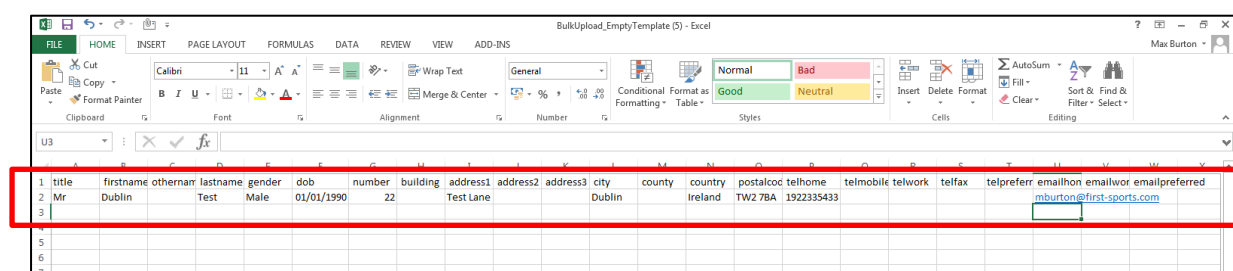
File

Browse Upload

**Files to Import**

- BulkUpload\_EmptyTemplate (5).csv

Populate the template



The screenshot shows the Excel spreadsheet template for bulk upload. The first row is highlighted in red. The columns are: title, firstname, othername, lastname, gender, dob, number, building, address1, address2, address3, city, county, country, postcode, telhome, telmobile, telwork, telfax, telpreferred, emailhon, emailwor, emailpreferred.

1	title	firstname	othername	lastname	gender	dob	number	building	address1	address2	address3	city	county	country	postcode	telhome	telmobile	telwork	telfax	telpreferred	emailhon	emailwor	emailpreferred
2	Mr	Dublin		Test	Male	01/01/1990	22		Test Lane			Dublin		Ireland	TW2 7BA	1922335433					mburton@first-sports.com		
3																							
4																							
5																							
6																							
7																							

**Irish Rugby Football Union**

10-12 Lansdowne Road | Ballsbridge | Dublin 4 | D04 F720

T +353 01 6473800 | F +353 01 6473801

www.irishrugby.com



## Upload the template and select Import

**Bulk Upload**

Upload your lists

Create Lists

Download the bulk update spreadsheet template

Download

Instructions

- Enter the information into the cells on the spreadsheet
- Please make sure the template headings are not altered in anyway.
- The fields First Name, Last Name, DOB (DD/MM/YYYY), Email address are mandatory.
- The process will not work if mandatory cells are left blank or completed incorrectly.
- The individuals included in this upload (or his/her parent/guardian) have confirmed that they have read the Data Protection Statement and consent to the use of their personal details as set out in the IRFU/Club Youth/Adult/Member Registration Form.

Upload list files

Please upload the CSV list files below

File

Browse Upload

Files to import

BulkUpload\_EmptyTemplate (5).csv

Import

A list will appear informing the user of how many of the individuals have been uploaded. NOTE: If there are any duplicate records the in the system will not upload and they fall under the failed rows column. To see why they have failed, select Error Records. If complete, select **Finished**.

**Bulk Upload**

Processing Lists

Imported lists will appear once processed

Name	Successful Rows (Warnings)	Failed Rows	Error File	Warning File
BulkUpload_EmptyTemplate (5).csv	1 (1)	0		

All files have been processed

Finished Upload more

The original Everyone grid will load, from here it is possible to filter to see if the individual was entered.

People Dashboard

Everyone

Antrim

New Member New Contact Export Bulk Upload

First Name	Last Name	IRFU ID	Known as	Date Of Birth	Address	Phone	Email	Balance	Source	Member	Contact	Player	Player Type
Dublin	Test	15747832		01/01/1990		1922335433	mburton@first-sports.c...		Import	No	No	No	

Filters Clear Search

It is important to bear in mind, upon Bulk Uploading those individuals, they are not currently members, therefore they are only viewable via the Everyone and Non Members grids.

### Irish Rugby Football Union

10-12 Lansdowne Road | Ballsbridge | Dublin 4 | D04 F720

T +353 01 6473800 | F +353 01 6473801

www.irishrugby.com

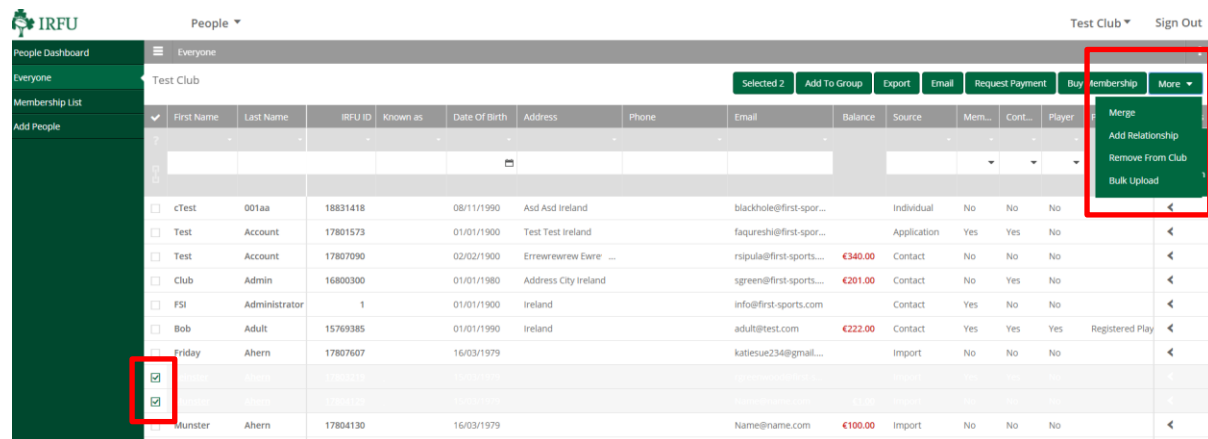


## Adding relationships to existing contacts

Click People > Everyone > Add Contact

Click the checkbox beside the two names you wish to add the relationship for

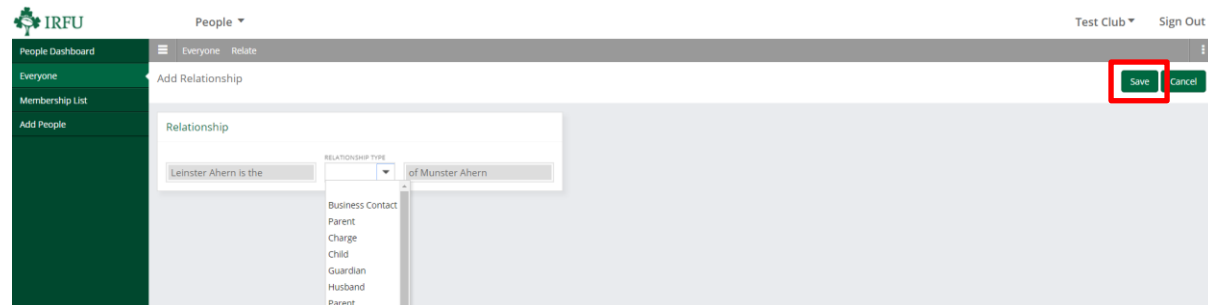
Then click on 'More' in the right hand corner and 'Add relationship' from the drop down



The screenshot shows the IRFU People Dashboard. The left sidebar has a green header with 'IRFU' and a menu with 'People Dashboard', 'Everyone', 'Membership List', and 'Add People'. The main area is titled 'People' and shows a list of contacts. The top bar has 'Test Club' and 'Sign Out'. The contact list has columns: First Name, Last Name, IRFU ID, Known as, Date Of Birth, Address, Phone, Email, Balance, Source, Mem..., Cont..., and Player. Two contacts are selected, indicated by checkboxes. The 'More' dropdown menu is open, showing options: Merge, Add Relationship, Remove From Club, and Bulk Upload.

First Name	Last Name	IRFU ID	Known as	Date Of Birth	Address	Phone	Email	Balance	Source	Mem...	Cont...	Player
cTest	001aa	18831418		08/11/1990	Asd Asd Ireland		blackhole@first-spor...		Individual	No	No	No
Test	Account	17801573		01/01/1900	Test Test Ireland		faqureshi@first-spor...		Application	Yes	Yes	No
Test	Account	17807090		02/02/1900	Errewewew Ewre ...		rsipula@first-sports...	€340.00	Contact	No	No	No
Club	Admin	16800300		01/01/1980	Address City Ireland		sgreen@first-sports...	€201.00	Contact	No	Yes	No
FSI	Administrator	1		01/01/1900	Ireland		info@first-sports.com		Contact	Yes	No	No
Bob	Adult	15769385		01/01/1990	Ireland		adult@test.com	€222.00	Contact	Yes	Yes	Yes
Friday	Ahern	17807607		16/03/1979			katiesue234@gmail...		Import	No	No	No
Munster	Ahern	17804130		16/03/1979			Name=name.com	€100.00	Import	No	No	No

Enter the relationship and click 'Save'



The screenshot shows the IRFU People Dashboard with the 'Add Relationship' form open. The form has a 'Relationship' section with a dropdown menu showing 'Leinster Ahern is the' and a text input field 'of Munster Ahern'. A list of relationship types is shown: Business Contact, Parent, Charge, Child, Guardian, Husband, and Parent. The 'Save' button is highlighted in the top right corner.

### Irish Rugby Football Union

10-12 Lansdowne Road | Ballsbridge | Dublin 4 | D04 F720

T +353 01 6473800 | F +353 01 6473801

www.irishrugby.com

