

Grainger Wind Symphony CRM System players manual

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Purpose of the CRM

What is it?

The CRM system is an implementation of the open source software known as “civiCRM”. The software aims to make managing the relationship between non profit organisations and their “customers” smooth and easy. The software approaches this with the viewpoint that all members, sponsors and donors are “customers” of a non profit organisation. As a player of the Grainger Wind Symphony we are members paying membership and participating in various activities, mostly rehearsals and concerts. CiviCRM provides various functions that can aid GWS in the administration and management of these memberships, events and payments.

How it can help:

The CRM has been implemented for GWS with the aim of reducing the workload on the personnel and section managers while simultaneously improving communications between players and section managers.

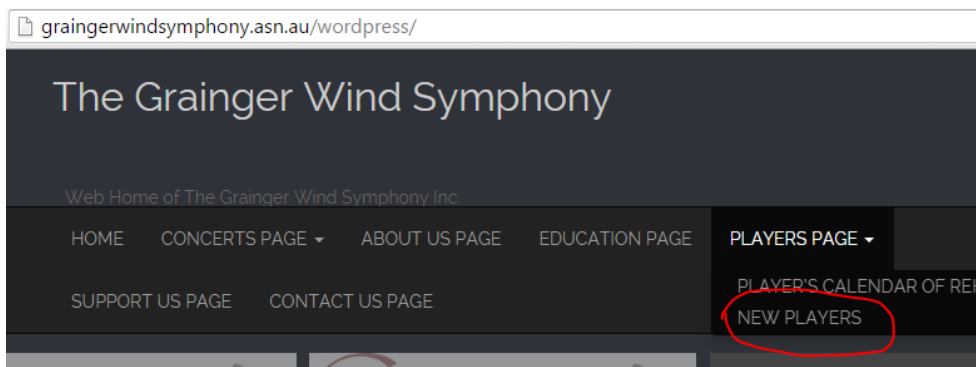
The CRM will reduce the administrative load on the personnel manager and section managers by shifting a large part of administration to the players themselves. Players can self administer to a large extent with records automatically created for reporting player numbers at any given concert and easy details of fees paid. The personnel manager no longer needs to spend significant time creating lists of who is playing and can spend more time finding more personnel and assisting those already playing. The treasurer also has ready lists of who is playing and who has paid what making accounting simpler.

The CRM can improve communications between section managers and players by providing reliable and up to date information on how to contact players in a central place. The CRM provides an easy way of sending bulk mail to appropriate groups of people, such as all those who play baritone saxophone or all saxophones playing in a given concert. This ease of bulk email can assist section managers giving them more time to concentrate on what they are saying and less time of creating lists of who they need to be talking to. The CRM can be extended to enable bulk SMS messages to groups of players also, this is planned for a later date.

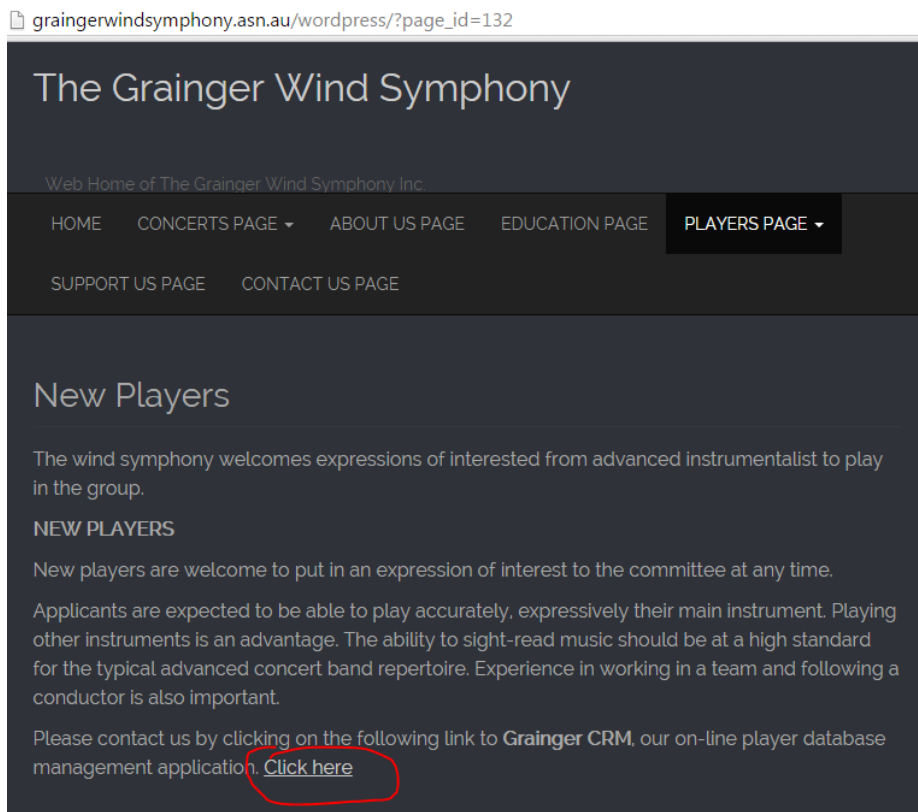
Initially signing up or expressing interest to play with GWS

If you have never used the GWS CRM before you will need to fill out the “Register your interest to play with GWS” web form. Even if you have been playing with GWS for a long period of time, this is the correct way to get access to the system initially. After you have completed this form a section manager or the personnel manager will approve you as a player to gain further access to the system.

1. First thing to do is go to the GWS web page: www.graingerwindsymphony.asn.au and “New players” in the players page menu as shown below:



2. Next, click the “Click here” link for new players to register on this page as shown below:




- This will take you to the “Register your interest to play with GWS” web form. [power-user tip: you can go directly to this web form with the URL: <http://crm.graingerwindsymphony.asn.au/drupal/index.php?q=civicrm/profile/create&gid=16&reset=1>] The first thing you need to do on this form is select a username for use with this system. This is important, as it is how you identify yourself next time you come back. Make it something easy to remember, it can even be your name, as long as it is not taken already. Type something in and click the “Check availability” button to the right.

- If you get a red “This username is taken appearing to the right of “Check availability, as pictured below, please try something else and press check availability again.

- Keep trying usernames until you get a green “This username is currently available” as pictured below:

6. Complete the rest of the form. Note you must fill in fields with a red asterisk next to them.
7. The final item of the form verifies you are a human user and not a naughty robot out to hack our system. This is a safety precaution to keep data about you safe from hackers. Click in the box next to "I'm not a robot". Please bear with us and answer this simple question(s) you may be presented with, you may be asked to select pictures containing certain types of images or read partly obscured or distorted text. If google can verify it thinks you are a real person without answering some questions you may get a tick from just clicking. You should end up with a tick next to "I'm not a robot"

Additional information

✓ I'm not a robot 
reCAPTCHA
Privacy - Terms

Thank you!

-
8. That is all there is to the form. Click the save button at the bottom and you are done with the form.
 9. You will, shortly after completing the form, get an email from the system. The email will contain a link you need to click on to set your password. Please click the link.
 10. The link will take you to a page that explains this is a one time login and you will need to set a password immediately. Click "log in"

11. You will then get a page like the one pictured below. You will need to think of a password, something not easy for other people to guess. I suggest using multiple words to make it easy to remember but hard to guess. You will need to enter your chosen password twice, just to make sure you typed it correctly. You may optionally select a photo at this point, but it is not required. You should also check you time zone is set correctly: Australia/Melbourne will be the correct setting for most of us and will be the default.

[View](#) [Edit](#)

[Account](#) | [Name and Address](#)

E-mail address *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password

Confirm password

Password strength: **Weak**

To make your password stronger:

- Make it at least 6 characters
- Add lowercase letters
- Add uppercase letters
- Add numbers
- Add punctuation

To change the current user password, enter the new password in both fields.

Picture

Upload picture

[Choose File](#) No file chosen

Your virtual face or picture. Pictures larger than 1024x1024 pixels will be scaled down. Please only use tasteful pictures of your face.

▼ **Locale settings**

Time zone

UTC: Monday, February 15, 2016 - 02:58 +0000 ▼

Select the desired local time and time zone. Dates and times throughout this site will be displayed using this time zone.

[Save](#)

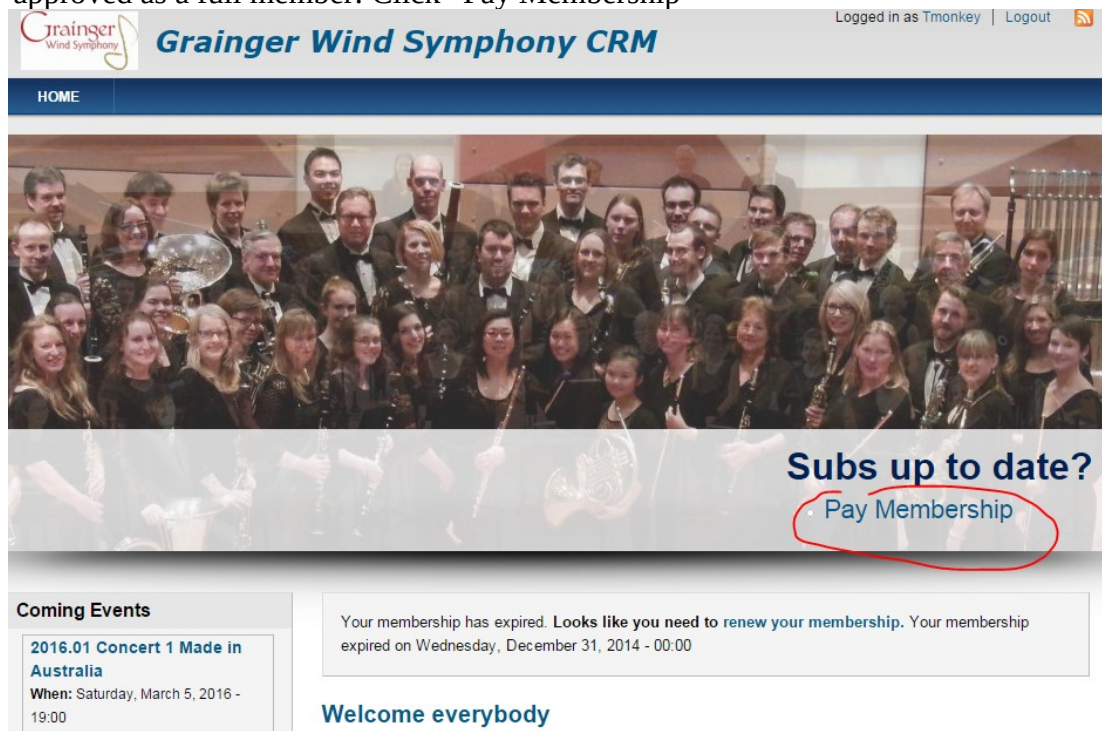
12. Click save at the bottom and you are all done.

You will need to wait for your section manager or the personnel manager to approve you as a player before you can do more.

Paying a one year subscription

Players may choose to purchase a one year subscription, as described immediately below, or choose to pay concert by concert, as described further down this document.

1. Type in your browser address bar "<http://crm.graingerwindsymphony.asn.au/>"
2. On the left hand side, under "User login" enter your username and password you set up in the initial sign-up, as document above. Press log in.
3. Your screen should look something like the picture below, providing you have been approved as a full member: Click "Pay Membership"



4. You will be taken to a form where you can pay a one year membership. Ensure you select the correct amount, full or concession price:

-
- Membership * Full Member - \$ 240.00
 Concession Full Membership - \$ 120.00

5. Update any details that are out of date, if nothing has changed you can leave the other name and address details as they are, but please do take this opportunity to check they are correct.
6. At the bottom of the form you have payment options to select. Select either PayPal, if you wish to pay by PayPal, Or the other option to pay cash in rehearsal or by direct deposit.

Payment Options

- Payment Method Pay By PayPal I will pay directly to the assistant treasurer in rehearsal or by direct deposit.

7. Press “confirm Contribution” at the bottom of the page. This will take you to a summary page before committing to a transaction. Please check that all details are correct here and then press “Make contribution” at the bottom.
8. If you selected to pay by paypal, you will be directed to a paypal screen once you press “Make Contribution” at the bottom. Complete this transaction with pay pal and you are done and your membership will we completed.
9. If you selected the other option there is more to do, you need to either pay cash at a rehearsal, or make a direct deposit bank transfer. You will only receive membership in the system after confirmation of payment is completed. There will be details at the bottom of this screen with BSB and account numbers to make a direct deposit to.

Register for events

Once your membership payment is complete you can go ahead and register for events, just as described in the section below, paying concert by concert, but all concerts will be free for the year. You will see the below rather than regular fees:

Concert by
concert fee *

Full fee (Member Discount: 100% Player with full mebership don't pay for concerts) - \$ 0.00

Concession fee (Member Discount: 100% Player with full mebership don't pay for concerts) - \$ 0.00

Payment Options

It is important for you to register for each event to help the section managers and personnel manager out. Please do so.

Paying concert by concert

1. Type in your browser address bar “<http://crm.graingerwindsymphony.asn.au/>”
2. on the left hand side, under “User login” enter your username and password you set up in the initial sign-up, as described near the start of this document. Press log in.
3. In the Coming Events section on the left, click “Register to Play” on the event you are interested in paying for.

Coming Events

2016.01 Concert 1 Made in Australia

When: Saturday, March 5, 2016 - 19:00

Concert of Australian works, four of which are World Premieres.

[Register to Play](#)

4. Ensure your Name and email address are correct, then select your options, Full or concession and payment method then click continue:

Concert by **Full fee - \$ 60.00**
concert fee * **Concession fee - \$ 28.80**

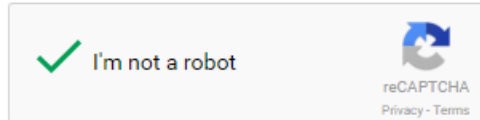
Payment Options

Payment Method Pay By PayPal I will pay directly to the assistant treasurer in rehearsal or by direct deposit.

5. You will then be taken to a confirmation page. If you are paying by direct deposit please take note of the instructions on this page that will include the correct BSB and account number. Click continue when you are happy everything is correct.
6. If you selected to pay by PayPal, you will be directed to a PayPal screen once you press "Make Contribution" at the bottom. Complete this transaction with PayPal and you are done and your concert by concert payment will be completed. You will receive an email receipt shortly.
7. If you selected the other option there is more to do, you need to either pay cash at a rehearsal, or make a direct deposit bank transfer. This will obviously take some time and your payment will be in a pending state until this transaction is confirmed by a treasurer.

What to do if you forget your password

1. Type in your browser address bar “<http://crm.graingerwindsymphony.asn.au/>”
2. On the left, under “User login” click the “request a new password” link
Enter your email address in the form you are presented with. You will also need to click in the box next to “I’m not a robot” possibly and answer a simple logic question that is hard for robots. You should end up with a green tick as below:



3. Now click “E-mail new password”
4. You will receive an email with a one time login link, click this link. You will get a notice that this is a one time login and you will need to set your password immediately. Click the “log in” link on this page to proceed
5. You will be presented with a screen similar to the one below. You simply need to enter a new password twice and select save at the bottom. That's it.

[Account](#) | [Name and Address](#)

E-mail address *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password

Password strength: **Weak**

Confirm password

To make your password stronger:

- Make it at least 6 characters
- Add lowercase letters
- Add uppercase letters
- Add numbers
- Add punctuation

To change the current user password, enter the new password in both fields.

Picture

Upload picture
 No file chosen
Your virtual face or picture. Pictures larger than 1024x1024 pixels will be scaled down. Please only use tasteful pictures of your face.

▼ [Locale settings](#)

Time zone

Select the desired local time and time zone. Dates and times throughout this site will be displayed using this time zone.