



**TRIATHLON**  
AUSTRALIA

# GOMEMBERSHIP LIFE MEMBER SET-UP

This manual is provided to all Triathlon Australia affiliated clubs and contains support on the process for setting up the life member category in GoMembership.

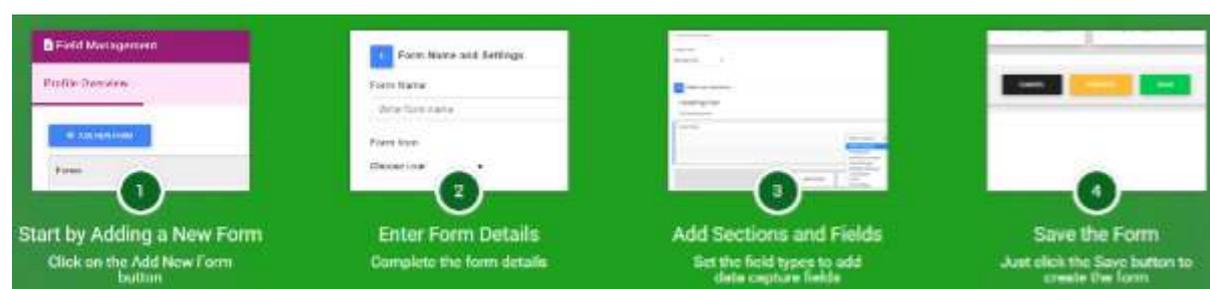
There are three steps to set up the Life Member Category and Process:

1. Form creation – create the form that contains the information
2. Rule creation – create the rule that determines if a member is eligible for life membership discount
3. Member Profile Designation – Mark the profile of the member as a “Life Member”

## FORM CREATION

From the menu, locate and click on the “Field Management” Tile. This is under the Club+ Header.

Create a Form by selecting “Add New Form” from the top left of the screen.



## FORM NAMES AND SETTINGS

You will need to give your Form a name. This form will appear on the Member Profile when they click on “Member Details” from within the “My Profile” area, unless you choose to “hide” the form from members (see below) so keep this in mind when considering the naming.

Next, select an icon for your form. You can search for types of icons by typing in the field provided.

## SECURITY

Choose whether you want the form information hidden from the member or if it will be seen on their profile.

## FIELDS & SECTIONS

If you want to provide a preamble on your form, you will need to add a "Section". This will give you the ability to enter a Header and a Sub header. To do this, click on "Add Section" then enter in the header and in the sub heading area, type in your preamble.



Adding a "Field" to your Form.

A field is the question/information being asked/collected. Click on the "Add Field" button. You will see that Label Text is already highlighted. This is the question field. Typing over the Label text, enter "Club Life Member" or similar.

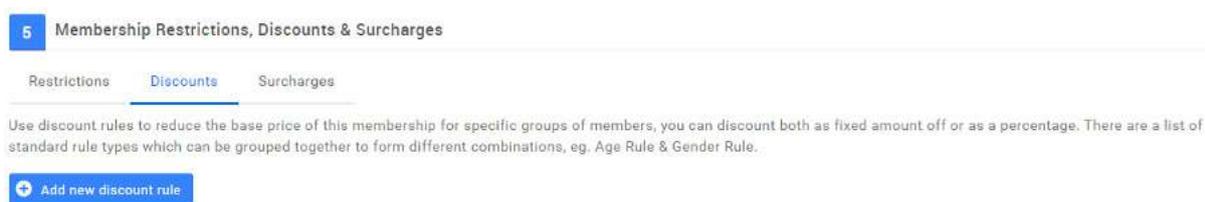


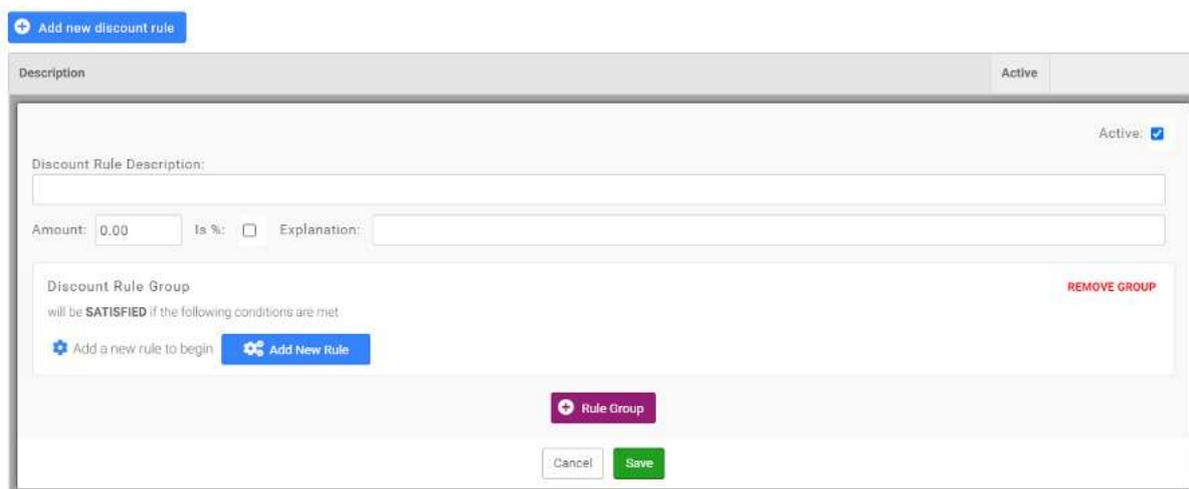
The answer type will also be pre-set to Short Answer. From the drop down on the left, please choose the answer type as Tickbox. This answer type is used because you only need confirmation if they are a Life Member or not.

Save the Form at the bottom of the screen. It will now appear in the list of Forms available to the club.

## RULE CREATION

Click on the Membership Setup Tile and select the Edit button against the membership you wish to add the rule to. To add a new rule, click on the blue "Add New Discount Rule" button, taking note of whether you are in Restrictions, Discounts or Surcharges based on which of the headings in blue.



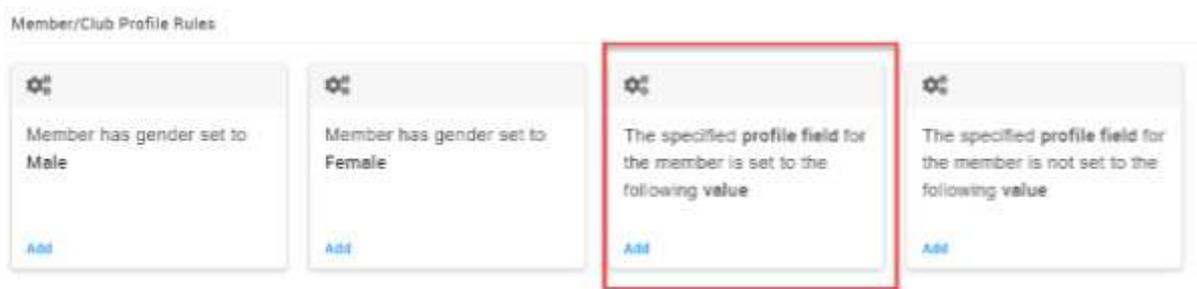


For discounts, the value can be either a dollar amount or a percentage. Enter the value into the “Amount” field. Where it is a percentage, you will need to note this by ticking the “Is Percentage” box after entering the value – Life Memberships generally give a 100% discount.

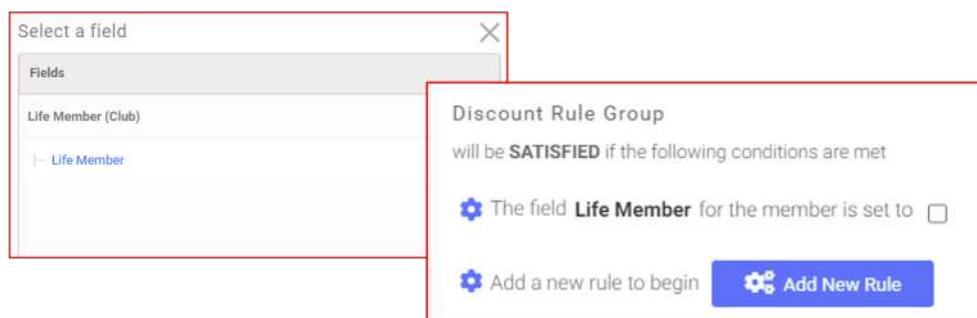
The text entered into “Description” is only for the Club reference and does not need to be detailed. “Life Member” will suffice. The text entered into “Explanation” will be seen by the member at the checkout, so enter a succinct description here, such as “Club Life Member 100% Club Membership Discount”.

After entering the description, explanation and discount amount, click on the blue “Add New Rule” button to define the rule for who this discount applies to. The information will tell you at the top what type of rule you are applying and to which membership.

To set a rule based on the Life Member field you have created above for your Club, select the rule tile “The specified profile field for the member is set to the following value” as per the below screenshot. You will then see a list of any forms and the fields that you have set-up for your Club.



You will select the Life Member field that you set up and chose the value as “ticked”. Clicking on the field will close the dialogue box and return you to the rule creation screen in the membership. Selecting this field will mean that where a Club administrator has marked the member profile with a “tick” for Life Member, they will receive the discount that you set.

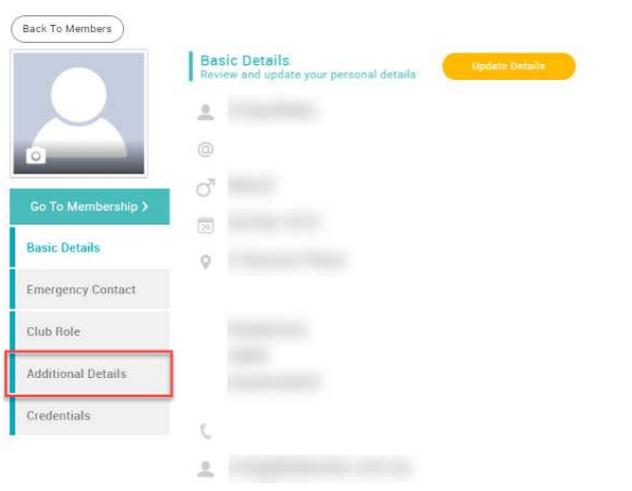
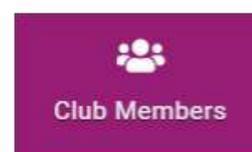


It is important to order your rules where there is more than one on a particular area, with the highest discount at the top. This is because where a member meets more than one of the rules you have applied, the discount or surcharge listed first is the one that will be applied. So, if you have 25% off for members over 65 years and 100% off for Members who are Club Life Members and they are listed in that order on the Membership, a Life Member who is over 65 years will only be given the 25% discount because that is the rule that is listed first.

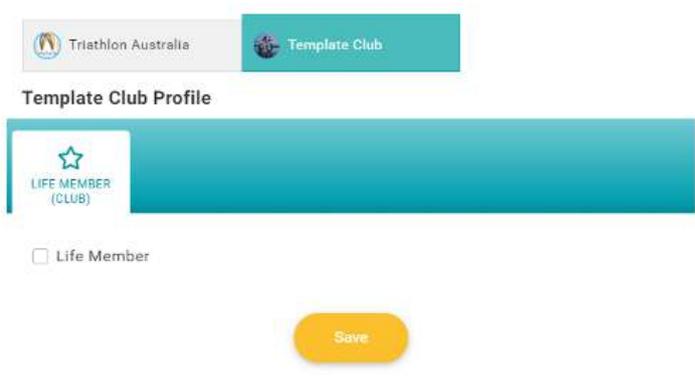
## MEMBER PROFILE DESIGNATION

Select the Club Members Tile and find the relevant member.

In the member’s profile, select the Additional Details tab.



Click on the Club Tab and tick the box noted as the Life Membership (Club)



Remember to select Save

Once these three steps are completed, when the member comes into the system and selects a membership that you have applied the rule to, the discount will automatically apply and be shown at checkout.

NOTE: It will NOT update the display price on the memberships, which means until your member gets to the checkout, it will appear that the cost is the same for them as for non-Life Members. Assure them that once they proceed with finalising their selection, they will see the discount at the checkout page.