



GoMembership Club Administration Manual

TRIATHLON AUSTRALIA

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REPORTING

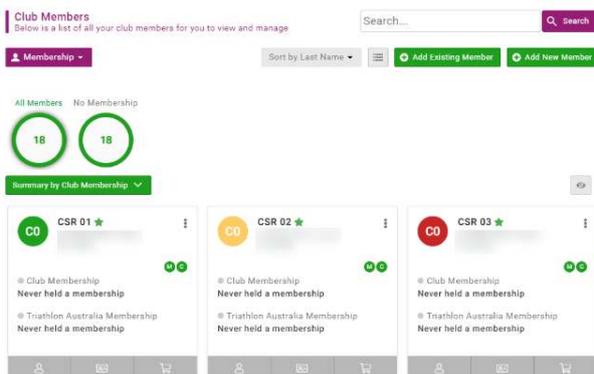
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TEAM SET-UP

MANAGING MEMBERS

From the Menu, select “Club Members”, or, if already in the Club Profile area of GoMembership, click on the words “Club Members” which is located under the purple header.



MEMBER OVERVIEW

By default, this page will show you a list of your members by Membership. There will be infographic circles near the top of the screen which will display each of the memberships set up at your Club and the number of members that hold that membership. You can click on any of these circles to display just the members registered to this Membership.

From this page, you are also able to search for members by using the search bar to the top right. You can enter in a first name, last name or email address. Click on “Search” after entering in details and all matching member “Tiles” will appear on the screen.

You can change the view of the members by clicking on the green drop down “**Summary by Club Membership**” button where you will be able to select to change the view by renewal status, role, Club Members Status and Member Status.

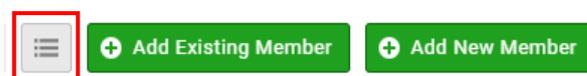


You can also change the display view from Tiles to List. To do this, click on the small square icon to the left of “**Add Existing Member**”. You members will then appear in a list as displayed below.

Name	Email	Roles	Membership	Primary	
Clyde Dale	clydes@outlook.com	Member	Club - No Membership NOB - No Membership	Yes	
Petal Foster	petal@outlook.com	Member, Club Administrator	Club - Active Membership Expires: 30/06/2027 NOB - Active Membership Expires: 30/06/2027	Yes	

ADD MEMBERS

To add a new member who has never had a profile within GoMembership previously, click on the green “**Add New Member**” button. If it is an individual who has held membership with any affiliated Club but not your own, you will need to click the “Add Existing Member” button and search for them using their email address and date of birth. The system will send an email to the Member requesting confirmation that they agree to be added to your Club.



When clicking on the “**Add New Member**” button, you will be presented with the same sign-up form as individuals will see on the login screen. Complete all mandatory fields. The username will automatically populate with the email address entered on the form, however this can be changed. When you are finished entering their details, click on the declaration tick box and then click “**Continue**”.

You will then be able to select to add another Member, Edit the Member you have just created or add Membership to the Member. Click on the relevant button.

TRIATHLON AUSTRALIA

Add member

First Name Last Name

Email Address

Contact Number

Date of Birth

Day Month Year

Success!
Member has been successfully added.

What Next?

Add another member

Edit member

Add membership

Close

EDIT MEMBER DETAILS

To edit a member, click on their tile, or if in list view, their name or the edit pencil to the far right of their name. This will take you into their profile. You will be able to select which area of their profile you want to look at or update by navigating through the grey menu options to the left under their profile image. You can click on the yellow **“Update”** buttons or the **“add”** buttons throughout each of these areas.

To view the members answers to any of the Forms that you have set-up at your Club, click on the **“Additional Details”** tab in the grey menu options. On the page that comes up, you will be able to see your Club listed along the top.

When you click on your Club tab, you will then see any of the Forms you have set up and the Members answers. If you have any fields that are only managed by the Club (hidden or set to not editable by the members e.g. Life Member) this is where you will update those fields. Be sure to click on the **“Save”** button at the bottom of the screen when making changes.

Back To Members

Triathlon Australia Template Club

Template Club Profile

Go To Membership >

Basic Details

Emergency Contact

Club Role

Additional Details

Credentials

CLUB UNIFORM

LIFE MEMBER (CLUB)

Please select your shirt size

Label text

XS

S

M

L

XL

2XL

Save

If you have Life Members at your Club, you can view/edit and update this field for the members through this area.

ASSIGNING MEMBER ROLES

To grant a member Club Administrator access to your Club or to assign an additional role to a Member, such as Secretary, President or General Committee Member, click on the **“Club Role”** tab from the left-hand side and click on the **“Update Roles”** button.

All of your members will have “Member” ticked by default. You can select their roles within your Club by clicking on the tick box next to the relevant role. When you have finished, click on the **“Save”** button, then click on the **“Back to Members”** button above the member profile picture to repeat this process for the rest of your members.

It is important to remember to untick the Club Administrator box if someone leaves your Club or no longer requires administrator access to ensure security of your club and member information.

MEMBER ROLES

- i. Club Administrator - FULL administrative access to the Club and Members within the system.
- ii. Event Administrator - administrative access to the Event Management area and the Field Management area allowing set-up and administration of events for your Club and creating and editing event forms.
- iii. All other roles are titles only and do not give any special permissions

Note: DO NOT remove the Club Administrative role from your profile unless absolutely intending to do so. You will no longer be able to access any of the administrative areas if you do.

MEMBER CREDENTIALS

You can view the credentials that have been added by a member by clicking on the “**Credentials**” button.

To view the details of the Credential such as the Number and any supporting documentation that was uploaded, simply click on the tile with the credential details you want to see. This will open up a pop-up which will show the detailed information.

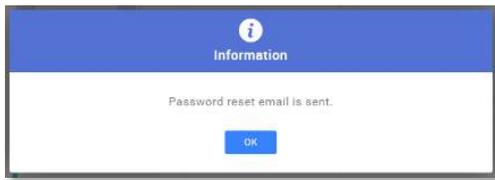
You can also edit this information when in there if need be.

MEMBER USERNAME AND PASSWORD

You can view a member’s username from the main screen in **Basic Details**. Scroll to the bottom of the screen. Under the phone number field, you will see a small head and shoulders icon. The text to the right of this is the members username. Neither the member themselves or you as Club Administrator can update a username. If you require this to be done contact Triathlon Australia at info@triathlon.org.au

To reset a member’s password, click on the “**Update Details**” button from the Basic Details screen, scroll to the bottom and under their username field, you will see “Password Notification”.

Click this button to send a password reset to the members email address. You will receive an on-screen message advising that the password reset email has been sent.

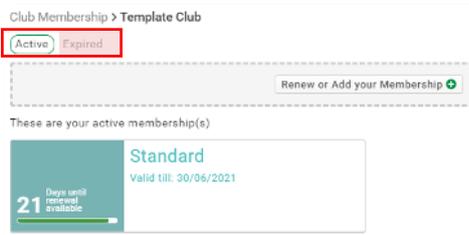


MANAGING MEMBERSHIPS

VIEW MEMBERSHIPS

You can view the Membership that is held by your members when in their profile. You can also manage memberships on their behalf. To do this, click on the **“Go To Membership>”** tile under the Profile Image.

You will see your Club Tile at the bottom, If the Member has any active Membership with your Club, you will see a number in your Club Tile and a note on how many days/months until it expires. If they do not have an active membership, you will see **“+ ADD”**



For a

member with active memberships, you can view past Memberships that have been held with your Club, after clicking on your club tile, click on **“Expired”** to the right-hand side. This will then show the memberships that have previously been held by the individual and their expiration date.

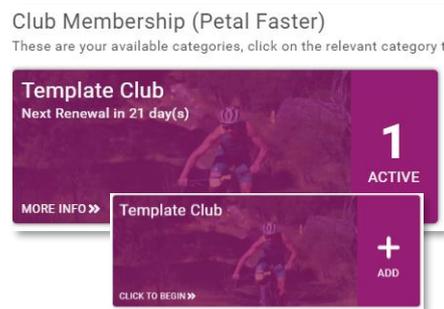
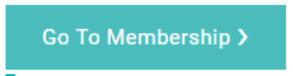
If the member does not have any Active Memberships with your Club, when you click on the Club tile, you will be taken straight to the Membership Tile view to make a selection. You will only be able to see the memberships that

are valid for the member profile that you are currently managing. For example, if you are in the profile of a member over the age of 20 and you have age restrictions on your junior Membership, you will only see the Adult Memberships.

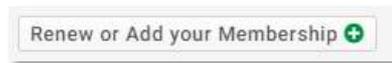
MEMBERSHIP – ADD

If you need to process a membership purchase or renewal on behalf of a member you will need to **“Add”** a membership for them.

Following the steps above to view a membership, locate the required member profile, click on **“Go To Membership”** and click on your Club Tile.

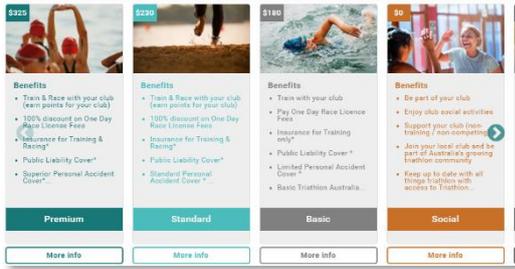


If the member still has an active membership, you will need to click on **“Renew or Add your Membership”**



Make your Membership selection by clicking on the relevant membership tile. If you have set-up any additional questions or products that can be purchased by members you will need to enter this information (or skip for non-mandatory fields).

When complete, at the bottom of the screen you will be able to select either **“Save and Continue”** or **“Checkout”**. If you are managing the Memberships for more than one member, select **“Save and Continue”** this will take you back to the Member List where you can add memberships for additional members in your Club by following the same steps as above.



When you are finished making your selections, click on **“Checkout”** and you will be taken directly to the checkout where you will see all memberships purchased for all members.

ITEM SUMMARY	QTY	NET TOTAL	GST	TOTAL
<p>Premium (Petal Faster) Template Club (CL900815) <small>Good to know: Designed for the avid triathlete who wants additional value and benefits from their club membership.</small></p>	1	\$9.99	\$0.99	\$1.00
<p>Premium Adult (Petal Faster) Queensland (CL000007) <small>Designed for the avid triathlete who wants additional value and benefits from their triathlon membership.</small></p>	1	\$0.99	\$0.99	\$0.99
<p>Premium Adult (Petal Faster) Triathlon Australia <small>Designed for the avid triathlete who wants additional value and benefits from their triathlon membership.</small></p>	1	\$227.27	\$22.73	\$250.00

The National and State Memberships are automatically applied at the cart. The Memberships will be grouped by member, where you have added membership for more than one.

You will also be able to remove any memberships incorrectly selected for a member by clicking on the **“Remove”** button under their Club Membership. This will automatically remove the National and State Memberships for the member.

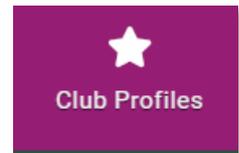
To finalise the purchase, select **“Pay with Card”**. Complete all fields on the dialogue box and click the **“Pay”** button. You will receive a notification that payment was successful and you will be taken to a summary screen where you can download the pdf invoice or return to **“home”**.

MANAGING FAMILY GROUPINGS

It is important to note that when members are grouped together as a family, they will each be able to manage the profiles and memberships for all members within the group when they log into their account. So only families/those who should have access to each other’s accounts, should be grouped using the Families functionality.

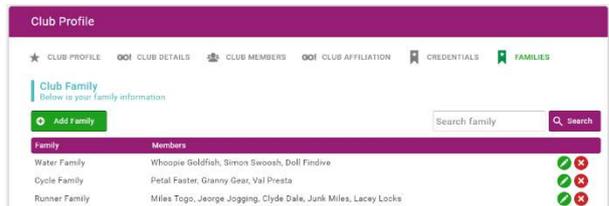
When referring to Families in GoMembership, this is only the **“Grouping”** of individuals into their family group. This is NOT a connection to a family membership and does not automatically qualify anyone for a family discount.

From the Menu, locate and click on the **“Club Profiles”** tile. On the new page, click on the word **“Families”** which is located under the purple header. You will also see this option if you are in the **“Club members”** area of the system.



Any families that have a connection to your Club will appear here. In some instances, not all of the family members will belong to your Club. Where this is the case, you will not be able to see that members details, only that there are additional people within the family who not part of your Club. They will show as **“+ 1 Member”**

ADD A FAMILY



To add a Family, click on the green **“Add Family”** button on the screen. By default, the family name will be **“My Family”**. To change this, click on the small pencil icon, change the name then click on the small green tick to save.

+ Add

Miles Togo (miles@outlook.com)
 Junk Miles (junk@outlook.com)

Next you will need to select which members from your Club are part of this Family Group. To do this, slowly type the name/s in the search box and click on the relevant member name then select the “Add” button. Repeat this process for all individuals you want grouped together. When finished, click on the yellow “Save” button at the bottom.

EDIT A FAMILY

To edit a family, click on the green pencil icon to the far right of the family in your list. You will be able to edit the family name, add members (only those within your Club) and remove members. Follow the steps listed above to edit the family name and add members. To Remove members, click on the red “X” to the right of their name. Click on the yellow “Save” button when done.

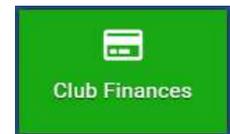
Any changes that you make to a family will be reflected when any of the members within the family log into their profile. This includes the removing of members.

MANAGING FINANCES

FINANCE OVERVIEW

Please do not manage any of your Finances via the Stripe website. GoM is integrated with Stripe and therefore ALL transactions and refunds etc are to be viewed and transacted via GoMembership. You will break the link between the funds and the transaction if you perform any refunds etc in Stripe. *Also, please note that in this area, clubs will only see the club component of a transaction and Triathlon Australia will only see their component.*

From the Menu, locate and click on the “Club Finances” tile.



This will take you straight to the Payment Summary screen where you will see an overview of payments by the Current Month. You can change the view by making a selection from the drop-down box on the left-hand side. This only changes the summary data at the top of the page. It does not filter the invoices listed out below.

Payment Summary	Subscription Summary	Instalment Summary	Planned Payments	Failed Payments
Breakdown of your club payments				
Last month: ▼				
Payment Summary Payments: \$34.00 Received income: \$32.30 Fees: \$1.70			Payment Breakdown Membership: \$34.00 Events: \$0.00 Other: \$0.00	

Under the summary you will see a list of payments. You will be able to see the payer name, the payment method, the value and the status. You can click on the settings cog to the far right to see more information on any of the payments/invoices. This will show you all of the people on the invoice as well as all of the Club Products purchased for each of them.

Reference	Date	Payer Name	Type	Method	Total	Status
48432218	10/01/2021	Dot Kofke	Payment	Credit/Debit Card	\$0.00	Paid
48432217	10/01/2021	Opak-Gladwin	Payment	Credit/Debit Card	\$0.00	Paid

REFUNDS

In GoMembership (not Stripe) you can process refunds for any memberships that have been paid via credit card. This will refund the money straight to the payers credit card. To do this, click on the settings cog to the far right of the record. You will then be taken into a copy of the invoice/payment record. You will see to the right you can click on **“Refund”** or at the bottom of the list of memberships/items paid for, you will have **“Refund All”**.

If you need to make a full refund of all fees paid to your Club by this member, click on **“Refund All”**. In doing this you will be presented with a pop-up to enter in any notes to add to the refund. When you are finished, click on **“Refund”**.

If you are only processing the refund for one member in the invoice or only some of the items/memberships purchased, click on the **“Refund”** button to the right of the record you want to refund. You will be presented with a pop-up where you can select to make a full or partial refund.

If you select partial, even if you make multiple refunds on the one record, you will

only ever be able to refund up to the full value that the member paid. You will then see the summary screen updates with the status of either Refunded or Partially Refunded in the Status Column of the payment record.

Gross	Max Refundable	Refunded	
\$400.00	\$400.00	\$0.00	

If a refund needs to be processed for Triathlon Australia Fee paid for by the member, this will need to be processed by Triathlon Australia directly as the funds are deposited into their Bank Account. Please contact Triathlon Australia at info@triathlon.org.au

SUBSCRIPTIONS (AUTORENEWALS) & FAILED PAYMENTS

From the Club Finances area you will also be able to view a list of the **“Subscriptions”** set-up for your members as well as details on any failed payments.

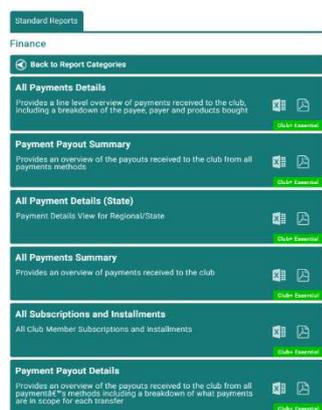
If you click the **“View Plans”** button next to a member record, you will see the details of which membership (including any add-on items) are set to auto-renew and when.

If you need to assist a member with updating their credit card details, you can do so by clicking the **“Update Card Details”** button. You will not be able to see the existing card details except for the censored data on the summary page, but you will be able to enter in new credit card details.

RECONCILIATION REPORT

One of the standard issues reports in GoM is the **Payment Payout Details** report.

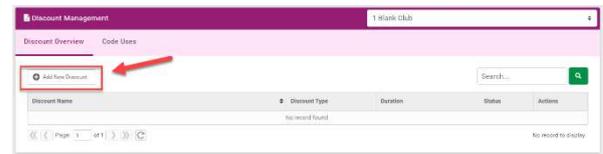
This report details the payments that have been **made to your Club's bank account** (from your Stripe account), the payer information, amounts paid including fees and date information. This



report will only show you the payments that have been deposited to your account.

There are other, more detailed finance reports available.

Select the Club that the discount is for and click **Add New Discount**



Next, give the discount a name in the **Discount Details** field. A description is optional but helps for reporting, so enter details as necessary

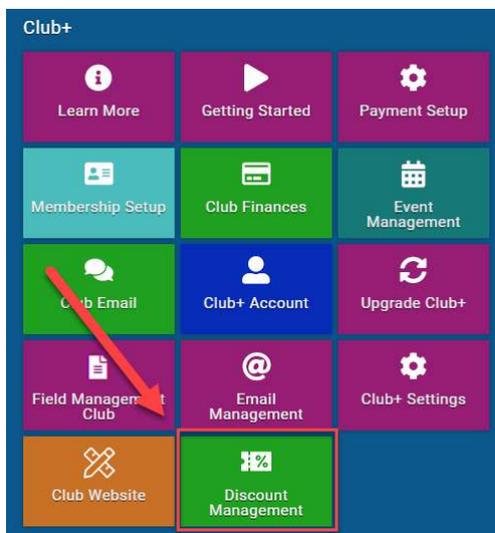
1 Discount Details

Discount Name *

Explanation

DISCOUNT CODES

Discount codes can be used on Triathlon Australia and Club memberships to give a partial or full discount at the checkout.



Discount type is to specify which type of purchase the code is to be used for.

- Membership
 - o *Only a membership purchase*
- Event
 - o *Only an event purchase*
- Product
 - o *Only a product purchase*
- Cart discount
 - o *Anything that may be in the cart (including all of the above types)*

Discount Type *

Cart Discount

- Cart Discount
- Membership
- Event
- Product

CREATE A CODE

To create a code, please go to the **Discount Management** tile under the Menu button

Set a start and end date for the validity of the codes

Discount Starts * Time-Hr: Min:

01/08/2021 00 00

Discount Ends * Time-Hr: Min:

14/08/2021 00 00

Usage limits is where you can specify the number of uses and whether they have to be unique (ie if you wanted to allow an individual to use the same code multiple times you can otherwise set them to only use by a person once)

Usage Limit

Unlimited Use

Restricted Use

Usage limit per discount group code

1

Is there a limit per user?

Usage limit per Member

1

From there, in usage restrictions, if we wanted the discount to only work with a specific type of purchase, this drop down appears to allow you to put conditions on it.

2 Usage Restrictions

Discount code will be applied to

Always apply to all Memberships

Always apply to all Memberships

Always apply to the following Categories

Always apply to the following Memberships

Apply to all but exclude from the following Categories

Apply to all but exclude from the following Memberships

If selected, a window will appear to let you specify those items based on what is available with the club. This will feed from the clubs already set up membership, events and product items.

+ Add Items

Items	Actions
Basic	
Social	
Premium	
Standard	

Discount Value provides a field to enter the discount you want to provide. The slider lets you change between a % or \$ figure for the value above.

3 Discount

Discount Value *

10.00

Is Percentage

4 Codes

+ Add Code + Generate Codes

Codes

Use the **Codes** window to create the code. There is also an option to bulk-create codes based on the parameters above. Please note, you won't be able to generate codes until you have completed some items above (it will prompt and highlight missing items).

x Add Code ✓ Save

Beginning text

TEST

Code *

123

Ending text

TA

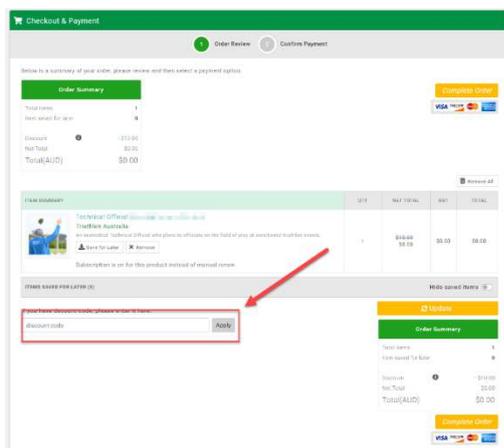
Preview: TEST123TA

When adding a code it will let you create a code/set of codes including if you want to put a prefix or other text around it. Once done click on save.

The Codes window will show all available codes, including usage (this will come later). Finally here you will click on save and the created code should be ready to go.



At the checkout there is a section to enter the discount codes in. If the code you used matches with any of the conditions behind it, it will activate and discount as appropriate



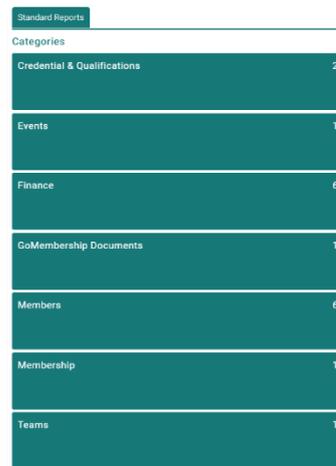
Discount codes can be used on Triathlon Australia and club memberships to give a partial or full discount at the checkout.

To create or view codes, please go to **Discount Management** under the Menu tile

REPORTING

There are a suite of reports available in GoM covering all areas of the database including Events, Members, Memberships, Finance and Credentials.

From the Menu, locate and click on the **“Club Reports”** tile. You will then see different categories listed. Click on each of the tiles to view the reports within.



When you have located the report you want to run, click on either the excel or pdf icon depending on your preferred report output format. The report will automatically begin to generate.

CLUB EMAIL

“Club Email” functionality allows you to email your Club members ad-hoc. It should not to be confused with the **“Email Management”** area of the system which is the automatic “action based” sending of emails (for example, the automatic confirmation email when a membership is purchased).

Through Club Email, you can communicate with your members as required. You can also select which members to email.

NEW EMAIL

From the Menu, locate and click on the **“Club Email”** tile. On the new page, click on the small yellow circle with the envelope **“New Message”**.



SENDER EMAIL

When the page loads, you will see that the sender email address will be the one that is attached to the Member profile who is creating the email. You are also able to select the email address that is listed in the Club profile from the drop down selection box.



RECIPIENT OPTIONS

To add recipients, click on the purple “**Select Members**” button. You will then be presented

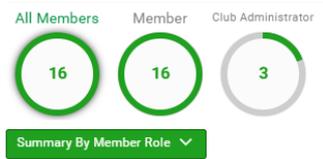


with a list of members in your Club. Using the green drop-down button under the infographic circles, you can change the view to see members by Club Membership, Member Role or Team.

Club Membership will group the members based on their membership with your Club. You will see all of your Club memberships in the Infographic Circles. Clicking on any of these will further refine the members displayed for selection. If you select the summary by “NGB Membership” this will show you the breakdown by National Classification (per image below).



Member Role will group the members based on the role they hold with your Club. You will see all the variances in the Infographic Circles. Clicking any of these will further refine the members displayed for selection.



For information on attaching Roles to your members, refer to section 1.d above

Team will group the members based on the team they are in within your Club. You will see all the teams you have set up in your Club in the infographic Circles. Clicking on any of these will further refine the members displayed for selection.



For information on creating Teams and adding members, see below.

You can also use the search function to look for specific members.

SELECTING RECIPIENTS



To select the members you want to send an email to you can either click on the tick box to the far right of their details or to select all members in view, click on the tick box in the header and you can untick any members as required.

As you make your selections, you will see the number in brackets on the “Confirm” button increase. When you have made your selection, click the “**Confirm**” button.



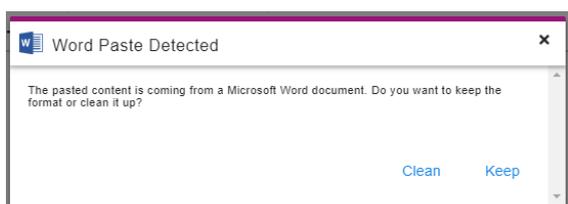
Click

on “**Recipients**” at any time to view the members selected and delete any as required. You will need to click the small yellow icon at the end of the word recipients.



EMAIL CONTENT

Within the email body, you have normal email type functionality. You can also copy data from Microsoft Word and paste it into the email body. Doing so will result in a pop-up notification advising that “Word Paste Detected”. You will then have the option to keep the formatting as it appears in Word or to clear it down so it will be pasted in plain text. Any images copied from within the Word Document will also be copied to your email.

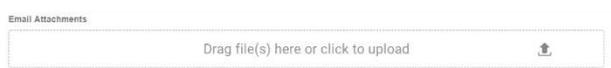


You can add images by clicking on the small image icon and selecting an image from your device

It is important that there are NO SPACES in the file name of your image as this will create a broken link in the sent email. Amend your file name as require PRIOR to inserting/uploading.

You can link a document in your text by clicking the upload file icon

You can also add a file as an attachment by click on the email attachments area at the



bottom of the screen.

There are a range of other formatting options along the top of your email including Font type and size, colour of font and background, alignment, hyperlinks and bullet point formatting.



You also have the option to personalise your email by using “Profile Fields”. Click on the “#” from the email header area.

You will then be able to select from a list of Member fields including First Name, Last Name, email address etc. This way you can address the email directly to the Member rather than a generic “Hi All” or “Dear Members”.



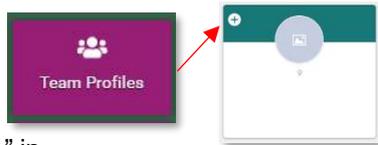
When you are happy with your email, you can click the green “Send” button, or if you want to save it for later, you can click the “Save as Draft” button. You will then see this email in the email list when you go to Club Email next. You can then edit it or send when you are ready to do so.

If you send a test email, any merge fields you use will come through as their merge field rather than the data itself. i.e #FirstName will appear on the test email as “#FirstName” rather than “Christian”. These fields will populate as expected in the actual emails providing they are entered correctly.

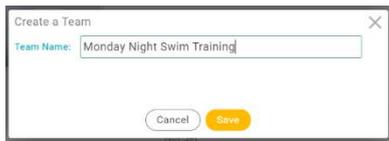
TEAM SET-UP

You can group your members into “Teams” in the database. Doing this will allow you to email members within those team groupings easily, rather than scrolling through the full list of members to make your selection.

From the menu, locate and click on the **“Team Profiles”** Tile, then click on the **“+”** in the tile under your Club name on the left-hand side.



You will then need to enter a name for your Team and click **“Save”**.



Along the top menu, click on **“Team Members”** then click on the green **“Add Members”** button

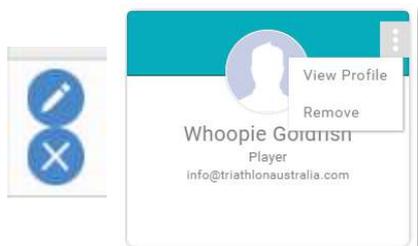
You will then see a list of all the Members in your Club. You can change the view to List View by clicking on the small icon to the left of the **“Done”** button at the top of the screen.



When you view your members by list view, you will also see the role/s they have with your Club. Click on the tick box beside/under the member that you want to add to the team. When you have made your selections, click on the green **“Done”** button at the top of the screen.

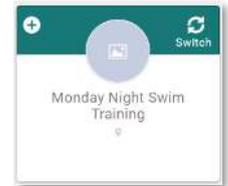
You will then see all of the members you have added to the Team. You can sort them by Roles or by Surname, by changing the selection in the grey dropdown box at the top of the screen.

To remove any members, click on the three dots on the Member Profile if in Tile view and select **“Remove”** or Click on the **“x”** next to the member if in list view.



You can add as many teams as you like by repeating this process. Members can also be added to multiple teams. When you have more than one team, to change which team you are

in, click on the **“Switch”** button on the top right of the Team Tile. You will then be able to select from all teams that you have set up.



To make your selection, simply click on the team you want and the dialogue box will close and you will see the selected team name over on the left hand side of the page.

